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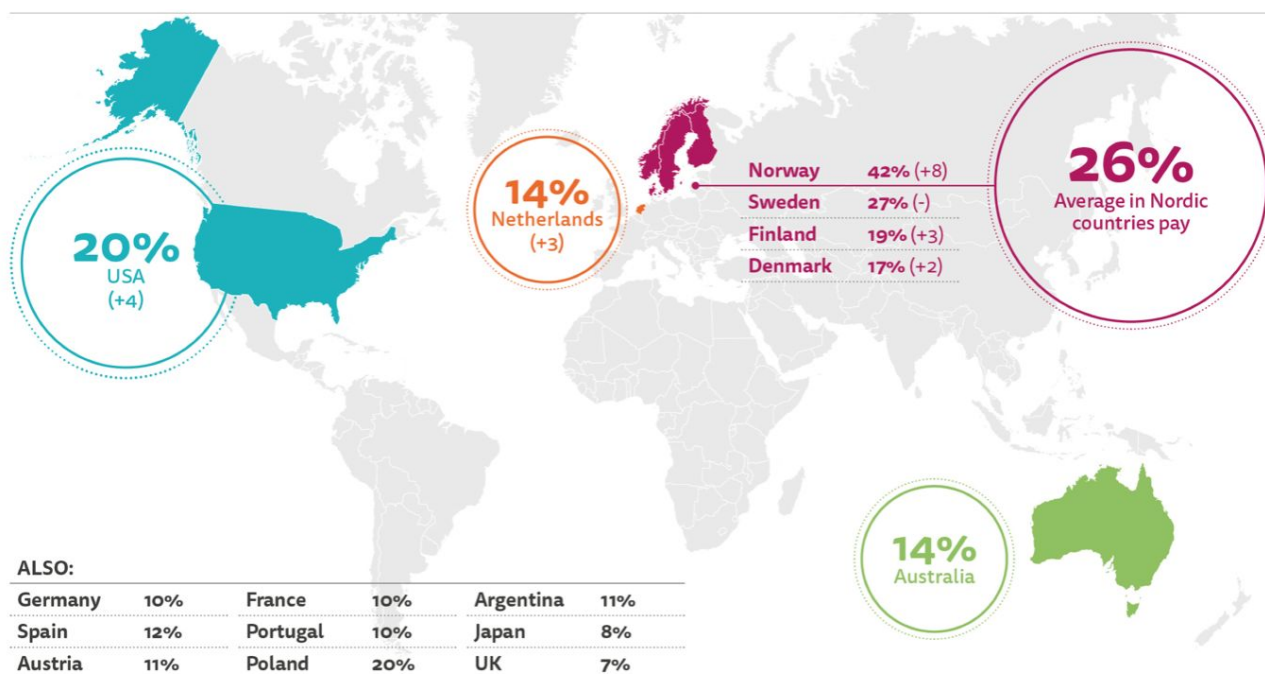
# Global trends towards digital, mobile and paid media continue, accelerated by coronavirus pandemic

This year’s **Reuters Institute Digital News Report** confirms underlying shifts towards a more digital, more mobile, and more platform-dominated media environment, with evidence that some distinctive and premium news publishers continue to see growth in subscriptions. The report suggests that the coronavirus crisis is likely to speed up these trends while also driving a real, but almost certainly temporary, surge in reliance of trusted news brands on television. Most of the research in this year’s report, which is based on a survey in 40 countries, was collected in January and early February before the crisis hit, but also draws on updated surveys in April at the height of the lockdown in many countries. The report reveals continuing high levels of concern about misinformation online and on social media with most people holding domestic politicians responsible rather than activists, journalists or foreign governments.

## Economic impacts of pandemic further drive to shift business models

The coronavirus crisis and its knock-on impact on print and advertising revenues is already putting a new focus on publisher strategies for subscription, membership and donations. Our data from January already showed significant increases in the percentage paying for any online news in a number of markets – including a jump of four percentage points in the United States to 20% and eight points in Norway to 42%. We’ve seen increases in other parts of Europe as well as Latin America and Asia.

### PROPORTION THAT PAID FOR ANY ONLINE NEWS IN LAST YEAR - SELECTED COUNTRIES



Q7a. Have you paid for ONLINE news content, or accessed a paid-for ONLINE news service in the last year? Base: Total sample in each market = 2000.

The majority of subscriptions are now for digital-only packages, though combined print/digital bundles are still popular in some markets. In countries with higher levels of payment (e.g. the US and Norway) between a third and more than half of all subscriptions go to just a few big national brands – suggesting that *winner takes most* dynamics are persisting. But in both these countries a significant minority are now taking out more than one subscription, often adding a local or specialist publication.

## PROPORTION WITH ACCESS TO PAID NEWS THAT HAVE ACCESS TO EACH BRAND UK, US, NORWAY



**PAY3.** You said that you currently have access to a single news brand. Please list all of the online brands you'd normally have access to for that you currently have access to. Base: All who have access to a single news brand: USA = 584, UK = 269, Norway = 751.

Overall, we find that the most important factor amongst those who subscribe is the distinctiveness and quality of the content followed by convenience and price. The purpose or political alignment of a publication is also a key factor for some, especially in the United States. Despite this, a large number of people remain perfectly content with the news they can access for free and we observe a very high proportion of non-subscribers (40% in the US and 50% in the UK) who say that nothing could persuade them to pay.

Our research shows that local newspapers (and their websites) are valued much more in some countries than others. Over half of those who regularly read local newspapers in Germany (54%) say they would miss them 'a lot' if they were no longer there, with 49% in Norway, and 39% in the US saying the same. Only 25% of those who read local newspapers in the UK say they'd miss them.

Co-editor **Rasmus Nielsen** says:

*“We see clear evidence that distinct, premium news publishers are able to convince a growing number of people to pay for quality news online. But most people are not paying for online news, and given the abundance of freely available alternatives, it is not clear why they would. In such a competitive market, only truly outstanding journalism can convince people to pay”*

## Misinformation and the role of platforms

Global concerns about misinformation remain high. Even before the peak of the pandemic, more than half of our global sample (56%) said they were concerned about what is true or false on the

internet when it comes to news. Domestic politicians are the single most frequently named source of misinformation, though in some countries – including the United States – people who self-identify as right-wing are more likely to blame the media – part of a *pick-your-side* dynamic.

#### PROPORTION THAT SAY THEY ARE MOST CONCERNED ABOUT FALSE OR MISLEADING INFORMATION FROM



**40% politicians**

More in... USA, Brazil, Philippines, South Africa



**13% ordinary people**

More in... Japan, Taiwan, South Korea



**14% activists**

More in... Hong Kong, Norway, Czech Republic



**10% foreign governments**

More in... Denmark, Finland, Germany, Netherlands



**13% journalists**

More in... Greece, South Korea, Croatia, USA

Q FAKE\_NEWS\_2020b. Which of the following, if any, are you most concerned about online? False or misleading information from... Base: Total sample = 80155.

When it comes to the spread of false information through online channels, respondents in most countries were most concerned about Facebook (29%) compared with other networks like YouTube (6%) and Twitter (5%). However, in parts of the Global South, such as Brazil, Mexico, Malaysia and Chile, people say they are more concerned about closed messaging apps like WhatsApp. This is a particular worry because false information tends to be less visible and can be harder to counter in these private and encrypted networks.

### How should the media and platforms deal with inaccurate statements by politicians?

Recent statements by Donald Trump and the Brazilian President Jair Bolsonaro have highlighted the issue of whether the news media - or platforms like Facebook or Twitter - should block inaccurate or dubious statements by politicians. Across countries the survey data show most people (52%) agree that the news media should report these statements prominently because ‘it is important for the public to know what the politician said’ rather than not emphasise the statement (29%) because it would give the politician unwarranted attention. This suggests people would like to make up their own mind rather than be told what to think by a journalist – or to feel that information was being withheld.

But when it comes to political advertising via social media the public is more cautious. In all but a handful of countries, most people say they want technology companies to block advertisements from political parties that *could* be inaccurate, because they have a responsibility to ensure that information on their platform is accurate. The survey did not ask specifically about organic social media posts by politicians. Senior Researcher **Richard Fletcher** says:

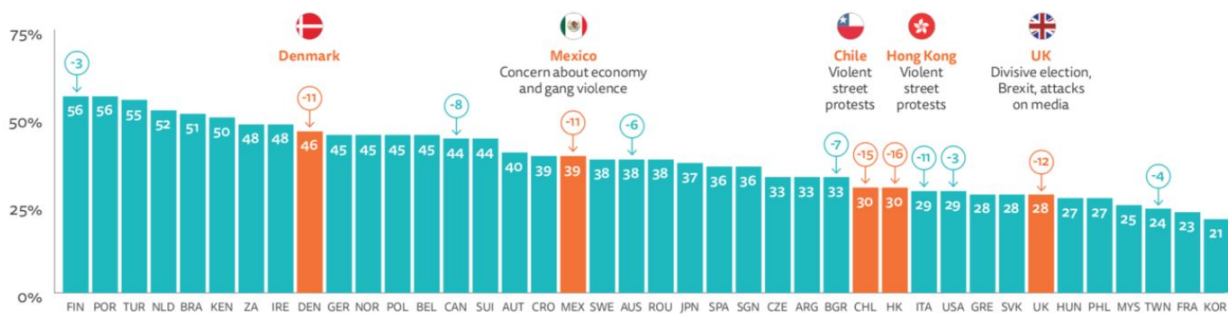
*“Platform companies may not want to have to decide what’s true – many politicians may not want them to either – but it seems that much of the public seems to have no principled opposition to the companies taking on this role, at least for political advertising”*

### Overall trust in the media continues to fall

In our January poll, across all 40 markets, less than four in ten (38%) said they trust ‘most news most of the time’ – a fall of four percentage points from 2019. Less than half (46%) said they trust the news they use themselves while trust in search (32%) and social media (22%) is even lower. Notable changes over the last 12 months include a 16-percentage point fall in Hong Kong (30%)

following violent street protests and a 15-percentage point fall in Chile (30%), which has seen regular demonstrations about societal inequality. In the UK trust has fallen 12 percentage points (28%), following a divisive election where many on the left blamed the media at least in part for their defeat. Political polarisation linked to rising uncertainty seems to have undermined trust in public broadcasters in particular, which are losing support from political partisans from both the right and the left.

## PROPORTION THAT AGREE THEY CAN TRUST MOST NEWS MOST OF THE TIME ALL MARKETS



Q6\_1. Please indicate your level of agreement with the following statement: I think you can trust most news most of the time. Base: Total sample in each market = 2000, Taiwan = 1027.

Subsequent polling for the Reuters Institute shows that the COVID-19 crisis did temporarily increase trust levels in the news media in the early stages of lockdown, though this has fallen almost as quickly as the media has stepped up its criticism of government and official handling of the pandemic.

Lead author **Nic Newman** says:

*“Divided societies seem to trust the media less, not necessarily because the journalism is worse but because people are generally dissatisfied with institutions in their countries and because news outlets often carry more views that people disagree with”*

Despite this, the majority (60%) say that they still prefer news that has no particular point of view and that only a minority (28%) prefer news that shares or reinforces their views. This preference for neutral news is strongest in countries like Germany, Japan, the UK, and Denmark – all countries with strong and independent public broadcasters. Partisan preferences have slightly increased in the United States since we last asked this question in 2013 but even here a *silent majority* seems to be looking for news that at least tries to be objective.

## Coronavirus consumption impact

Our surveys confirm that viewing of television news went up during the lockdown period in all six countries where we polled in January and April and this included increases with all age groups including younger audiences. Social media and online news sites also saw significant increases while readership of printed newspapers and magazines fell. Some trusted brands did disproportionately well online.

Across our six surveyed countries almost a quarter (24%) used WhatsApp to find, discuss, or share news about COVID-19, considerably up from January. Around a fifth (18%) joined a support or discussion group with people they didn't know on either Facebook or WhatsApp specifically to talk about COVID-19 and half (51%) took part in groups with colleagues, friends, or family. One in ten accessed closed video chats using platforms like Zoom, Houseparty, and Google Hangouts – many for the first time.

### Further data and insights from the 2020 report...

**Gateways to news:** Across all countries, just over a quarter (28%) prefer to start their news journeys with a website or app. Those aged 18–24 (so-called Generation Z) have an even weaker connection with websites and apps and are almost twice as likely to prefer to access news via social media. Across age groups, use of Instagram for news has doubled since 2018 and looks likely to overtake Twitter over the next year.

**Resurgence of email news:** To counter increased platform use, publishers have been looking to build direct connections with consumers via email. In the United States one in five (21%) access a news email weekly, and for almost half of these it is their *primary* way of accessing news. The majority of email users (60%) have signed up for a daily update, many of which are now anchored by a senior journalist and some of which have an audience of millions. These have been supplemented by pop-up newsletters about the coronavirus crisis.

**Podcasts and growing importance of audio:** The proportion using podcasts has grown significantly in the last year, with news podcasts continuing to be one of the most popular genres. Our January data show an overall rise in podcast listening to 31% (+2) across a basket of 20 countries we have been tracking since 2018. Around four in ten access podcasts monthly in Spain (41%), Ireland (40%), Sweden (36%), Norway (36%), and the United States (36%). By contrast usage in the Netherlands (26%), Germany (24%), and the UK (22%) is nearer to a quarter. Across countries, half of all respondents (50%) say that podcasts provide more depth and understanding than other types of media. Meanwhile, Spotify has become the number one destination for podcasts in a number of markets, overtaking Apple's podcast app.

**Climate change:** Across countries, almost seven in ten (69%) think climate change is a serious problem, but in the United States, Sweden, and Australia a significant minority dispute this. This group tends to be right-wing, and older. Television remains the most important source of news on the climate but younger groups pick up more information via social media and by directly following activists like Greta Thunberg.

While the COVID-19 crisis has reinforced the need for reliable and trusted news, the report argues that the next 12 months are likely to see significant changes in the media environment as severe economic pressures combine with political uncertainty and further consumer shifts to digital, social and mobile environments.

### Methodology

All figures, unless otherwise stated, are from YouGov Plc. Survey conducted in 40 countries; United States, United Kingdom, Germany, France, Italy, Spain, Portugal, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Hungary, Slovakia, Czech Republic, Poland, Croatia, Romania, Bulgaria, Greece, Turkey, South Korea, Japan, Hong Kong, Malaysia, Philippines, Taiwan, Singapore, Australia, Canada, Brazil, Argentina, Chile, Mexico, Kenya and South Africa.

Total sample size was 80,155 adults with around 2,000 per country. Fieldwork was undertaken at the end of January/start of February 2020.

The survey was carried out online. The data were weighted to targets set on age, gender and region, to reflect the total population. The sample is reflective of the population who have access to the internet and respondents were screened out if they had not accessed news in the last month. Note that in countries with more limited internet use, including Argentina, Brazil, Chile, Greece, Mexico, South Africa and Turkey, our samples tend to be based more around urban areas, which should be taken into consideration when interpreting results. In Kenya, the sample only includes people aged 18-55.

#### **Additional surveys:**

- » **COVID-19 (April 2020)** conducted in the United States, United Kingdom, Germany, Spain, South Korea, Argentina. Sample size was around 2,000 in the UK and Germany and 1,000 elsewhere.
- » **Paying for news (February 2020)** conducted in the United States, United Kingdom and Norway. Sample size around 4,000 in the UK and US and 2,000 in Norway.

#### **Contact**

For more information, interview requests or a copy of the full report, please contact **Eduardo Suárez** at [eduardo.suarez@politics.ox.ac.uk](mailto:eduardo.suarez@politics.ox.ac.uk) or **Matthew Leake** at [matthew.leake@politics.ox.ac.uk](mailto:matthew.leake@politics.ox.ac.uk).

#### **More information on the 2020 Digital News Report**

The research and report can also be found on a dedicated website ([www.digitalnewsreport.org](http://www.digitalnewsreport.org)) from 16<sup>th</sup> June containing slidepacks, charts, and raw data tables, with a licence that encourages reuse. A description of the methodology is available with the complete questionnaire.

Sponsors of this year's report include Google News Initiative, BBC News, Ofcom, Edelman UK, the Broadcasting Authority of Ireland (BAI), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation in Norway, the Dutch Media Authority (CvdM), the Korea Press Foundation, the Open Society Foundations as well as our academic sponsors at the Hans Bredow Institute, Hamburg University, the University of Navarra, the University of Canberra and Le Centre d'études sur les médias, Université Laval in Canada and Roskilde University in Denmark. Sole responsibility for the analysis, interpretation and conclusions lies with the authors and editors of the report.

#### **About the Reuters Institute for the Study of Journalism**

The Reuters Institute for the Study of Journalism is dedicated to exploring the future of journalism worldwide. The Institute receives core funding from the Thomson Reuters Foundation and is based in the Department of Politics and International Relations at the University of Oxford. It was launched in November 2006 and developed from the Reuters Journalist Fellowship Programme, established at Oxford 37 years ago. In addition to the fellowship programme for mid-career journalists from around the world, the Institute hosts leadership development programmes and research projects focused on the future of journalism. See <http://reutersinstitute.politics.ox.ac.uk/>

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Research Fellow at the Reuters Institute for the Study of Journalism. Her doctoral work explored online misinformation, mainly focusing on the sharing of false information via social media.

### **Rasmus Kleis Nielsen – Co-Editor**

Director of the Reuters Institute for the Study of Journalism and Professor of Political Communication at the University of Oxford, His work focuses on changes in the news media, political communication, and the role of digital technologies in both.

## About YouGov

YouGov is an international market research agency and pioneer of market research through online methods. YouGov has a panel of 6 million people worldwide, including 1.2 million in the UK representing all ages, socio-economic groups and other demographic types.