Reuters Institute Digital News Report 2020

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Reuters Institute Digital News Report 2020

Nic Newman with Richard Fletcher, Anne Schulz,
Simge Andı, and Rasmus Kleis Nielsen

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Foreword

Professor Rasmus Kleis Nielsen
Director, Reuters Institute for the Study of Journalism (RISJ)

The coronavirus crisis is having a profound impact not just on our health and our communities, but also on the news media. Most of the research presented in this year's *Digital News Report* was collected before the virus hit in many countries, but findings from the work we have carried out in the months since underline that the crisis is very likely to accelerate long-term structural changes towards a more digital, more mobile, and more platform-dominated media environment.

The bulk of this report is based on data collected by a survey of more than 80,000 people in 40 markets and reflects media usage in January/February just before the coronavirus hit many of these countries. But the key trends that we document here, including changes in how people access news, low trust, and rising concern about misinformation have been a backdrop against which journalists, editors, politicians, and public health officials have been battling to reach ordinary people with key messages over the last few months.

We know that this crisis has substantially increased the amount and frequency of news consumption as well as influenced attitudes to the news media, at least temporarily. We've captured this in a second set of polling data collected in April when the crisis was at its peak in some countries. This has helped us to see the impact of the crisis in terms of sources of news and also reminded us of the critical role that the news media play at times of national crisis, including documenting that people who rely on news media are better informed about the virus than those who do not.

While many media companies have been enjoying record audience figures, news fatigue is also setting in, and the short-term and long-term economic impact of the crisis is likely to be profound – advertising budgets are slashed and a recession looms, threatening news media, some of whom are struggling with adapting to a changing world. Against this background, this year's report also focuses on the shift towards paying for online news in many countries across the world, with detailed analysis of progress in three countries (the UK, USA, and Norway). What lessons can we learn about what could persuade more people to pay directly for news?

This year, our report carries important data about the extent to which people value and trust local news, perhaps the sector most vulnerable to the economic shocks that will inevitably follow the health crisis itself. And we also explore the way people access news about climate change as well as attitudes to media coverage for the first time.

Given that the coronavirus is continuing to impact the media landscape at great pace, we have significantly reduced the commentary on this year's market- and country-based pages, though we publish the key data that we collected in January/February in full.

Our main survey this year covered respondents in 40 markets, including 24 in Europe, and four in Latin America (Brazil, Argentina, Chile, and Mexico) as well as the United States and Canada. In Asia we have added the Philippines this year to our existing seven markets (Japan, South Korea, Taiwan, Hong Kong, Malaysia, Singapore, and Australia) and we are delighted to include Kenya for the first time, following the inclusion of South Africa in 2019. In the years to come we plan to continue to make this report even more comprehensive and more international by covering more countries in the Global South. Having said that, as we use online polling and need to make meaningful comparisons, we continue to focus on countries with high internet penetration and which are either broadly democratic or generally compare themselves to countries with a democratic tradition.

A report of this scale and scope is only possible due to collaboration from our partners and sponsors around the world. We are proud to have the opportunity to work with a number of leading academics and top universities in the report, as well as media experts from the news industry itself. Our partners have helped in a variety of different ways, from checking questionnaires to helping to analyse and interpret the results. Many are also organising events or publishing country reports looking in more detail at specific issues facing their national media – adding wider value to this international project.

Given the richness of the research, this report can only convey a small part of the data collected and work done. More detail is available on our website, www.digitalnewsreport.org, which contains slidepacks and charts, along with a licence that encourages reuse, subject to attribution to the Reuters Institute.

Making all this possible, we are hugely grateful to our sponsors: Google News Initiative, BBC News, Ofcom, the Broadcasting Authority of Ireland, the Dutch Media Authority (CvdM), the Media Industry Research Foundation of Finland, the Fritt Ord Foundation in Norway, the Korea Press Foundation, and Edelman UK, as well as our academic sponsors at the Hans Bredow Institute, the University of Navarra, the University of Canberra, the Centre d'études sur les médias, Quebec, Canada, and Roskilde University in Denmark. We are particularly grateful to the Open Society Foundations, our newest sponsor, which has helped us to expand the report to cover more countries in the Global South this year.

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

Methodology

This study has been commissioned by the Reuters Institute for the Study of Journalism to understand how news is being consumed in a range of countries. Research was conducted by YouGov using an online questionnaire at the end of January/beginning of February 2020.

- Samples in each country were assembled using nationally representative quotas for age, gender, region, and education. The data were also weighted to targets based on census/industry accepted data.
- As this survey deals with news consumption, we filtered out anyone who said that they had not consumed any news in the past month, in order to ensure that irrelevant responses didn't adversely affect data quality. This category averaged around 3%.
- We should note that online samples will tend to under-represent the consumption habits of people who are not online (typically older, less affluent, and with limited formal education). In this sense it is better to think of results as representative of *online* populations who use news at least once a month. In a country like Norway this is almost everyone (98%) but in Mexico it is only two-thirds (66%) and in South Africa just over half (55%). Our sample in Kenya only includes those aged 18-54 due to difficulties in reaching older people online. These differences mean we need to be cautious when comparing results between countries. We have marked countries with lower internet penetration or less representative online samples with an asterisk (*) in the table at the end of this section and have been careful in the report not to directly compare these countries on issues where we know that the sample difference would make results invalid (eg paying for news).
- It is important to note that some of our survey-based results will not match industry data, which are often based on different methodologies, such as web-tracking. The accuracy of these approaches can be high, but they are subject to different limitations, meaning that data can also be partial or incomplete.
- It is also important to note that online surveys rely on recall, which is often imperfect or subject to biases. We have tried to mitigate these risks through careful questionnaire design and testing. On the other hand, surveys can be a good way of capturing fragmented media consumption across platforms (eg social media, messaging, apps, and websites), and tracking activities and changes over time.
- We conducted two additional surveys this year. The first was a detailed study of paying for online news where we surveyed around 4,000 respondents in the United States and the United Kingdom and around 2,000 respondents in Norway. Polling was conducted by YouGov in February 2020 using a similar methodology as for the main survey. In April we conducted an additional survey with the Misinformation, Science and Media project run by the Reuters Institute in collaboration with the Oxford Internet Institute and support from the Oxford Martin School to understand the impact of the novel coronavirus on media consumption in six countries (UK, USA, Germany, Spain, Argentina, and South Korea). Samples sizes were approximately 2,000 in the UK and Germany, and 1,000 elsewhere. We have indicated occasions where data come from these additional surveys next to the appropriate chart. Where we compare the results from this survey to the *DNR*, we have removed those that use news less than once a month to make the data more directly comparable. For more details on the methodology for this survey, see the standalone report (Nielsen et al. 2020). Open questions were used in our surveys and some user comments have been drawn from these and are used in the text.
- A fuller description of the methodology, panel partners, and a discussion of non-probability sampling techniques can be found on our website along with the full questionnaire (digitalnewsreport.org).

Country/market	Sample size	Internet penetration
Europe		
UK	2011	95%
Austria	2005	88%
Belgium	2010	94%
Bulgaria*	2006	67%
Croatia	2009	92%
Czech Republic	2006	88%
Denmark	2061	98%
Finland	2050	94%
France	2038	92%
Germany	2011	96%
Greece*	2015	73%
Hungary	2011	89%
Ireland	2006	92%
Italy	2015	93%
Netherlands	2014	96%
Norway	2010	98%
Poland	2008	78%
Portugal	2012	78%
Romania*	2017	74%
Slovakia	2018	85%
Spain	2006	93%
Sweden	2091	96%
Switzerland	2012	94%
Turkey*	2017	83%
Americas		
USA	2055	89%
Argentina*	2007	93%
Brazil*	2058	71%
Canada	2002	93%
Chile*	2005	77%
Mexico*	2023	66%
Asia Pacific		
Australia	2131	89%
Hong Kong	2023	89%
Japan	2006	93%
Malaysia*	2013	81%
Philippines*	2019	72%
Singapore	2014	88%
South Korea	2304	96%
Taiwan	1027	93%
Africa		
Kenya (18-54)*	2003	87%
South Africa*	2006	55%

Source: Internet World Stats (http://www.internetworldstats.com). *Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users which should be taken into consideration when interpreting results.

Authorship and research acknowledgements

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

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

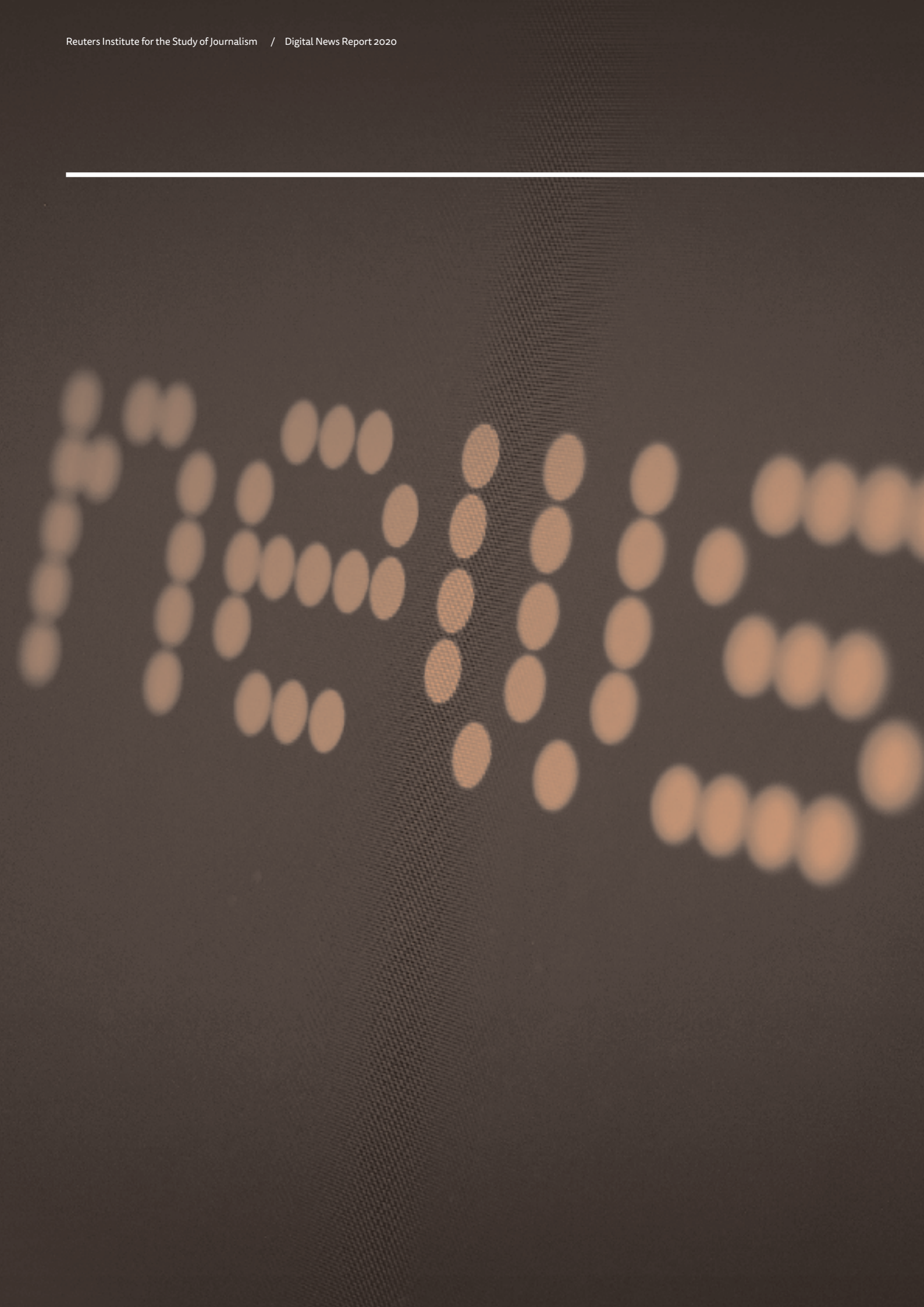
Dr Anne Schulz is a postdoctoral Research Fellow at the Reuters Institute for the Study of Journalism. Her doctoral work focused on populism, media perceptions, and news consumption. She is researching questions surrounding news audiences and digital news.

Dr Simge Andı is a postdoctoral 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. She uses survey and experimental data to study the consumption and sharing of news.

Professor Rasmus Kleis Nielsen is Director of the Reuters Institute for the Study of Journalism, Professor of Political Communication at the University of Oxford, and served as Editor-in-Chief of the *International Journal of Press/Politics* from 2015 to 2018. His work focuses on changes in the news media, political communication, and the role of digital technologies in both.

Market-level commentary and additional insight around media developments have been provided by academic partners and by our network of Reuters Journalist Fellows around the world.[1] Additional expert analysis and interpretation of the survey data were provided by the team at YouGov, in particular, Charlotte Clifford, Lucie Larboulette, David Eastbury, Mark Pellatt, and Anna Wilson.

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



SECTION 1

Executive Summary and Key Findings

Nic Newman
Senior Research Associate,
Reuters Institute for the Study of Journalism

This year's report comes in the midst of a global health pandemic that is unprecedented in modern times and whose economic, political, and social consequences are still unfolding. The seriousness of this crisis has reinforced the need for reliable, accurate journalism that can inform and educate populations, but it has also reminded us how open we have become to conspiracies and misinformation. Journalists no longer control access to information, while greater reliance on social media and other platforms give people access to a wider range of sources and 'alternative facts', some of which are at odds with official advice, misleading, or simply false.

Much of the data in this publication was collected before the virus hit many of the countries featured in this survey, so to a large extent this represents a snapshot of these historic trends. But to get a sense of what has changed, we repeated key parts of our survey in six countries (UK, USA, Germany, Spain, South Korea, and Argentina) in early April. These responses confirm industry data which show increased consumption of traditional sources of news, especially television, but also some online news sources.

Journalism matters and is in demand again. But one problem for publishers is that this extra interest is producing even less income – as advertisers brace for an inevitable recession and print revenue dips. Against this background it is likely we'll see a further drive towards digital subscription and other reader payment models which have shown considerable promise in the last few years. This is what makes it so important to understand how various models are progressing in different markets, such as the United States, Norway, and the UK, where we have conducted more in-depth research on pay this year. While the coronavirus crisis is likely to dramatically affect the short-term prospects for many publishers, our findings provide long-term insights into one important part of the future of the business of news. We also ask about the implications for society if more high-quality information disappears behind paywalls, a dilemma that has become more real during this health emergency.

Looking to the future, publishers are increasingly recognising that long-term survival is likely to involve stronger and deeper connection with audiences online, which is why we have also examined the growing importance of emails and podcasts, formats that are being deployed in greater numbers to increase engagement and loyalty. The coronavirus crisis has presented an immediate and urgent existential threat, but in the section on climate change, we explore how audiences access news about this longer-term threat to human existence and how they feel about media coverage.

Our report this year, based on data from six continents and 40 markets, aims to cast light on the key issues that face the industry at a time of unprecedented uncertainty. The overall story is captured in this Executive Summary, followed by Section 2 with chapters containing additional analysis, and then individual country and market pages in Section 3 with detailed data and extra context.

A SUMMARY OF SOME OF THE MOST IMPORTANT FINDINGS FROM OUR 2020 RESEARCH

- The coronavirus crisis has substantially increased news consumption for mainstream media in all six countries where we conducted surveys *before* and *after* the pandemic had taken effect. Television news and online sources have seen significant upticks, and more people identify television as their main source of news, providing temporary respite from a picture of steady decline. Consumption of printed newspapers has fallen as lockdowns undermine physical distribution, almost certainly accelerating the shift to an all-digital future.
- At the same time, the use of online and social media substantially increased in most countries. WhatsApp saw the biggest growth in general with increases of around ten percentage points in some countries, while more than half of those surveyed (51%) used some kind of open or closed online group to connect, share information, or take part in a local support network.
- As of April 2020, trust in the media's coverage of COVID-19 was relatively high in all countries, at a similar level to national governments and significantly higher than for individual politicians. Media trust was more than twice the level for social networks, video platforms, or messaging services when it came to information about COVID-19.

From our wider dataset collected in January:

- Global concerns about misinformation remain high. Even before the coronavirus crisis hit, more than half of our global sample 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. Facebook is seen as the main channel for spreading false information almost everywhere but WhatsApp is seen as more responsible in parts of the Global South such as Brazil and Malaysia.
- In our January poll across countries, 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. 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.
- Despite this, our survey shows that the majority (60%) still prefer news that has no particular point of view and that only a minority (28%) prefer news that shares or reinforces their views. 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.
- As the news media adapt to changing styles of political communication, most people (52%) would prefer them to prominently report false statements from politicians rather than not emphasise them (29%). People are less comfortable with political adverts via search engines and social media than they are with political adverts on TV, and most people (58%) would prefer platforms to block adverts that could contain inaccurate claims – even if it means they ultimately get to decide what is true.

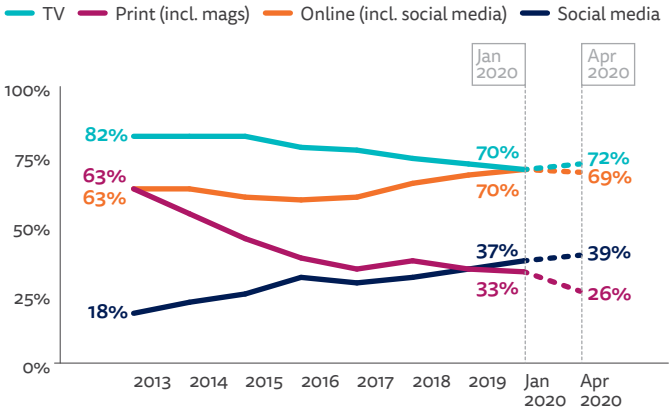
- We have seen significant increases in payment for online news in a number of countries including the United States 20% (+4) and Norway 42% (+8), with smaller rises in a range of other markets. It is important to note that across all countries most people are still not paying for online news, even if some publishers have since reported a 'coronavirus bump'.
- Overall, the most important factor for those who subscribe is the distinctiveness and quality of the content. Subscribers believe they are getting better information. However, a large number of people are perfectly content with the news they can access for free and we observe a very high proportion of non-subscribers (40% in the USA and 50% in the UK) who say that nothing could persuade them to pay.
- In countries with higher levels of payment (eg the USA and Norway) between a third and 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.
- In most countries, local newspapers and their websites remain the top source of news about a particular town or region, reaching four in ten (44%) weekly. But we find that Facebook and other social media groups are now used on average by around a third (31%) for local news and information, putting further pressure on companies and their business models.
- Access to news continues to become more distributed. 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 more than 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.
- To counter the move to various platforms, publishers have been looking to build direct connections with consumers via email and mobile alerts. 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. Northern European countries have been much slower to adopt email news channels, with only 10% using email news in Finland.
- The proportion using podcasts has grown significantly in the last year, though coronavirus lockdowns may have temporarily reversed this trend. 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.
- Overall, 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. Younger groups access much of their climate change news from social media and by following activists like Greta Thunberg.

CORONAVIRUS REMINDS PEOPLE OF THE VALUE OF TRADITIONAL NEWS SOURCES

Over the last nine years, our data have shown online news overtaking television as the most frequently used source of news in many of the countries covered by our online survey. At the same time, printed newspapers have continued to decline while social media have levelled off after a sharp rise.

The coronavirus crisis has significantly, though almost certainly temporarily, changed that picture. Television news has seen an uplift in all six countries where we polled in both January and April 2020. Taking Germany as an example (see chart), a 12-point decline in reach for TV news was partially reversed as many people turned to trusted sources of news including public service media.

PROPORTION THAT USED EACH AS A SOURCE OF NEWS IN THE LAST WEEK (2013–20) – GERMANY



Q3. Which, if any, of the following have you used in the last week as a source of news? **Q4.** (Apr. 2020). Which, if any, of the following have you used in the last week as a source of news? *Total 2013–20 samples ≈ 2000. Note. Apr. 2020 figures adjusted to exclude non-news users for comparability.*

Weekly TV news consumption rose by an average of five percentage points across all six countries. But it is worth noting that social media were also substantially up (+5) as more people used these networks for finding and sharing news in combination with television and online sites. By contrast, the lockdowns hit the reach of print newspapers and magazines with a six-point drop in Spain, not helped by difficulties in distributing physical copies.

PROPORTION THAT USED EACH AS A SOURCE OF NEWS IN THE LAST WEEK (APRIL 2020) – SELECTED COUNTRIES

	Online (incl. social media)	TV	Social media	Radio	Print (incl. mags)
UK	79%	71%	47%	35%	18%
USA	73%	60%	47%	21%	16%
Germany	69%	72%	39%	41%	26%
Spain	83%	71%	63%	24%	28%
South Korea	85%	65%	51%	14%	19%
Argentina	90%	77%	78%	24%	30%
Average change from January	+2	+5	+5	+2	-2

Q4. (Apr. 2020). Which, if any, of the following have you used in the last week as a source of news? *Base: Total sample: UK = 2191, USA = 1221, Germany = 2003, Spain = 1018, South Korea = 1009, Argentina = 1003. Note. Figures adjusted to exclude non-news users for comparability.*

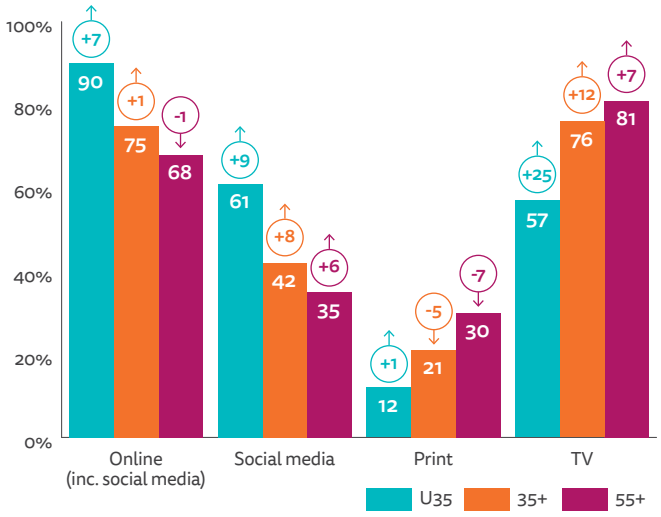
The change of underlying preferences is even more clear when we ask people to choose their *main* source of news. The UK shows a 20-percentage-point switch in preference from online to TV between the end of January and the start of April, and Argentina 19 points, with the average across six countries being a change of 12 points.

In the UK, Prime Minister Boris Johnson's address telling Britons to stay at home was one of the most-watched broadcasts in UK television history, with 27m tuning in live (excluding live streams via news websites and apps).[2] Nightly viewership of BBC TV bulletins was up by around 30% in March while the European Broadcasting Union (EBU) reported daily viewing increases across countries of 14% in the early stages.[3]

Two children watch British Prime Minister Boris Johnson's press conference as the spread of coronavirus disease (COVID-19) continues in Hertford, Britain March 23, 2020. REUTERS/ Andrew Couldridge

The uplift in TV and social media was experienced across all age groups, with under-35s proportionally showing the biggest increase in use of television as well as for using social media to access news. In the UK, under-35s showed an increase in watching TV news of 25 percentage points compared with January, though their core preference for online and social media remained. Older groups read fewer newspapers and watched more television news.

PROPORTION THAT USED EACH AS A SOURCE OF NEWS IN THE LAST WEEK (APRIL 2020) – UK

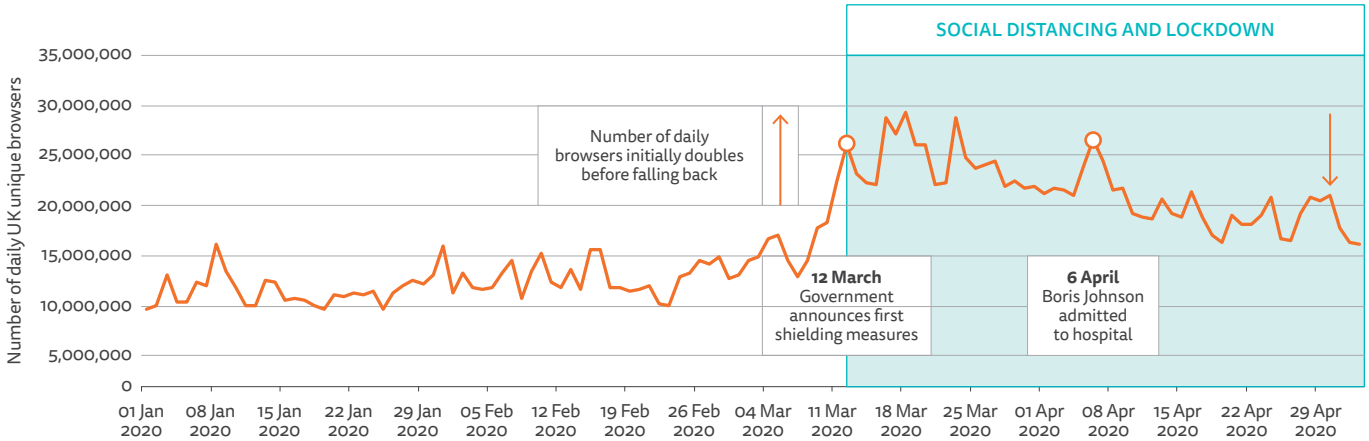


Q4. (Apr. 2020). Which of the following have you used in the last week as a source of news? *Base: U35/35+/55+: UK = 548/1643/923. Note. Showing change from Jan. 2020. Figures adjusted to exclude non-news users for comparability.*

By contrast to the UK experience, in countries with fewer widely used and broadly trusted sources, the television experience has been very different, with CNN and Fox News covering President Trump's press conferences in fundamentally different ways, and some broadcasters refusing to transmit live from sessions where the President often goes directly against medical and scientific advice. In the United States we see less of a boost for television news overall, though a similar growth in usage from under-35s.

Industry data also indicate strong traffic increases for *online* news with the most trusted brands often benefitting disproportionately. The BBC reported its biggest week ever for UK visitors, with more than 70m unique browsers as the lockdown came into effect – though traffic has since returned to more normal levels.

UK TRAFFIC DOUBLES TO BBC NEWS WEBSITE JAN-APRIL 2020



SOURCE: BBC. *Note: Unique browsers does not necessarily equate to people as they can be related to different devices or web browsers.*

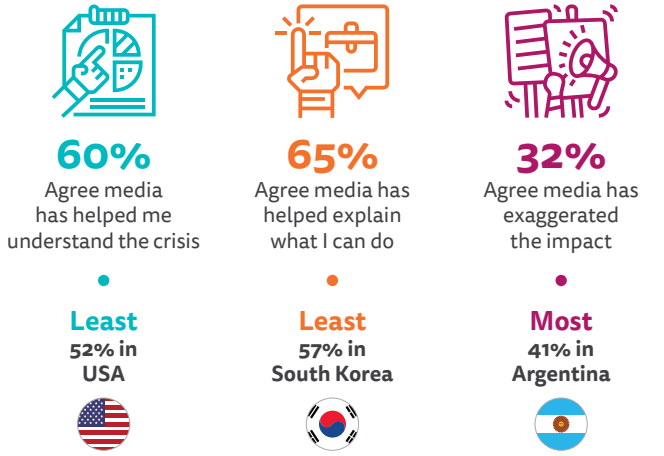
[2] https://www.theguardian.com/tv-and-radio/2020/mar/24/boris-johnsons-covid-19-address-is-one-of-most-watched-tv-programmes-ever
[3] https://www.newstatesman.com/culture/tv-radio/2020/03/coronavirus-bbc-corporation-boris-johnson-protect. EBU Report, *Covid-19: The Impact on Digital Media Consumption*, Apr. 2020, https://www.ebu.ch/publications

Commercial media have also reported a significant increase in online traffic and have produced many examples of innovations in data journalism and other visual formats online to help explain the crisis. Websites and apps have included practical guides for managing isolation and staying safe.

EXPLANATORY AND DATA-RICH ONLINE COVERAGE FROM THE *WASHINGTON POST*

Overall our April 2020 survey found the news media were considered to have done a good job in helping ordinary people understand the extent of the crisis (60%), and also in making clear what people can do personally to mitigate the impact (65%). Though some media have in the past been accused of sensationalising stories, on this occasion only a third (32%) think that the media have exaggerated the severity of the situation, though concern was higher in the United States (38%) and Argentina (41%), and amongst those that distrust the media already.

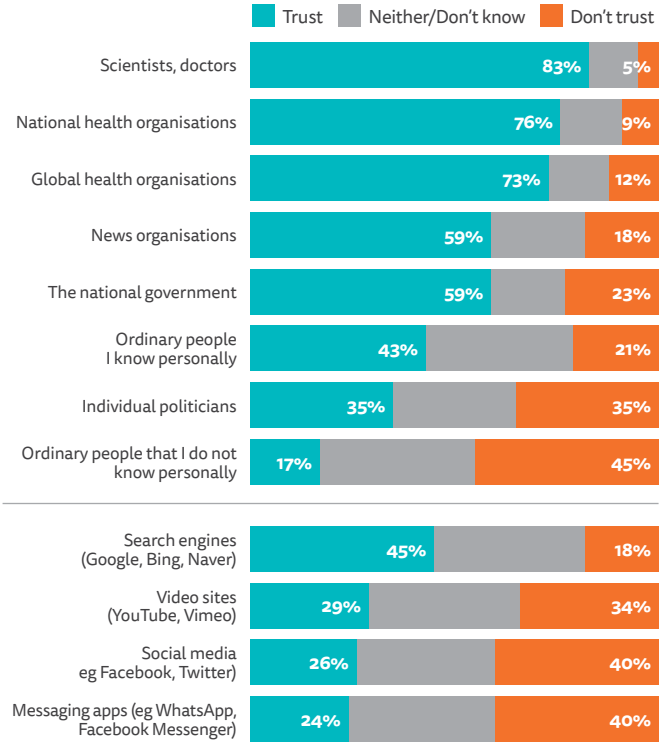
ATTITUDES TOWARDS NEWS MEDIA COVERAGE OF CORONAVIRUS (APRIL 2020) – SELECTED COUNTRIES



Q14. (Apr. 2020). To what extent do you agree or disagree with the following statements about the coronavirus (COVID-19)? *Base: Total sample: USA, UK, Germany, Spain, Argentina, South Korea = 8522.*

And in terms of trust for information about coronavirus, national news organisations score relatively well, behind doctors and health organisations but ahead of individual politicians and ordinary people. In recent years some populist politicians in particular have taken to undermining the media but this coronavirus pandemic has been a reminder that even weakened media play a critical role in informing populations and shaping opinion.

TRUST IN DIFFERENT SOURCES OF NEWS AND INFORMATION ABOUT CORONAVIRUS (APRIL 2020) – AVERAGE OF SIX COUNTRIES



Q10/11. (Apr. 2020). How trustworthy would you say news and information about coronavirus (COVID-19) from the following is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. *Base: Total sample: USA, UK, Germany, Spain, Argentina, South Korea = 8522. Note. Trust = 6–10, Don't trust = 0–4.*

At around the peak of the lockdowns, trust in news organisations around COVID-19 was running at more than twice that for social media, video sites, and messaging applications where around four in ten see information as *un*trustworthy. By contrast information found in search engines was seen as more reliable. Of course, neither search nor social companies create content themselves, so trust in this context is a reflection of the selection decisions they make.

It is particularly striking that average levels of trust in the national government and news organisations are almost identical, perhaps reflecting the way that in the early stages of this crisis many media organisations focused on amplifying government messages about health and social distancing, including carrying extended government press conferences. As things return to normal, the media are likely to become more critical of government and this may in turn lead to a return of more partisan approaches to media trust.

SOCIAL MEDIA AND THE CRISIS

While people are wary of social media and messaging apps, high usage may suggest that many people are confident in their own ability to spot misinformation or just that they value these platforms for other reasons, such as keeping in touch with family or friends, and for mutual support.

In April we found that across our six surveyed countries almost a quarter (24%) used WhatsApp to find, discuss, or share news about COVID-19 – up seven points on average on our January survey which asked about usage for *any* news. 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.

People applaud from their windows and balconies as they take part in an event organized through social media to show gratitude to healthcare workers during a partial lockdown as part of a 15-day state of emergency to combat the spread of coronavirus disease (COVID-19), outside a pharmacy in Ronda, southern Spain, March 20, 2020. REUTERS/Jon Nazca

Meanwhile Instagram and Snapchat have become popular with younger groups for accessing news about COVID-19. Celebrities and influencers play an outsized role on these networks, with some sharing music, running exercise classes as well as commenting on the wider health issues. Almost half of our 18–24 respondents in Argentina (49%) used Instagram, 38% in Germany. One in ten (11%) accessed COVID-19 news via TikTok in the US and 9% in Argentina.

Social media may be helping to spread false and misleading information, but it has also supported people at a time of anxiety and isolation and provided an effective way to amplify reliable information. It is important to remember that social media are generally used in combination with other types of information. In the six countries we surveyed in April, more than four-in-ten (43%) accessed both social media for news and traditional media sources on a weekly basis. A more detailed analysis showed that, in most countries, those who relied on news organisations for information about coronavirus were more knowledgeable about the crisis, whereas there was no consistent, significant pattern for those who relied on various platforms including social media – they were not more informed but, despite some fears to the contrary, they were not misinformed either (Nielsen et al. 2020).

PROPORTION OF 18-24s THAT USED EACH AS A SOURCE OF CORONAVIRUS NEWS IN THE LAST WEEK (APRIL 2020) – SELECTED COUNTRIES

	Instagram	Snapchat	TikTok
UK	24%	19%	6%
USA	26%	14%	11%
Germany	38%	10%	8%
Spain	26%	1%	1%
South Korea	10%	1%	5%
Argentina	49%	7%	9%

Q8. (Apr. 2020). Which, if any, of the following have you used in the last week as a source of news or information about coronavirus (COVID-19)? *Base: 18-24s: UK = 202, USA = 153, Germany = 183, Spain = 80, South Korea = 83, Argentina = 151.*

LASTING EFFECTS?

Media habits changed significantly during the COVID-19 lockdowns even if levels of interest have proved hard to sustain.[4] More people turned to live broadcast television news and to trusted news sources online, but the lockdowns have also accelerated the use of new digital tools, with many people joining online groups or taking part in video conferencing for the first time. Together with the impact on print production and distribution, it is likely that the net effect will be to speed up rather than slow down the shift to digital.

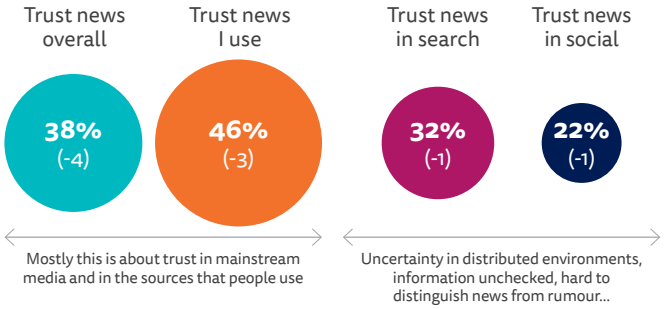
The implications for trust are harder to predict. In most countries the media played a largely supportive role in the early stages of the crisis – when lives were most at risk. But that consensus has already started to break down as normal activities resume and disagreements resurface about the best way to manage the recovery. Any 'trust halo' for the media may also be short-lived.

[4] https://www.niemanlab.org/2020/04/the-coronavirus-traffic-bump-to-news-sites-is-pretty-much-over-already

TRUST IN THE NEWS MEDIA CONTINUES TO FALL GLOBALLY

As the coronavirus hit, we observed overall levels of trust in the news at their lowest point since we started to track these data. In a direct comparison with 2019 we find that fewer than four in ten (38%) say they trust most news most of the time – down four percentage points. Less than half (46%) say they trust the news that they themselves use.

PROPORTION THAT TRUST EACH MOST OF THE TIME – ALL MARKETS



Q6_1/2/3/4. Please indicate your level of agreement with the following statements: I think you can trust most news/the news I use/news in search/news in social media most of the time. *Base: Total sample: All markets = 80155.*

We continue to see considerable country differences, ranging from Finland and Portugal where over half (56%) say they trust most news most of the time, to less than a quarter in Taiwan (24%), France (23%), and South Korea (21%). Just six countries now have trust levels of more than 50%.

Notable changes over the last 12 months include a 16-percentage point fall in Hong Kong (30%) following violent street protests over a proposed extradition law. In Chile, which has seen regular demonstrations about inequality, the media has lost trust (-15) partly because it is seen as too close to the elites and not focusing its attention enough on underlying grievances.[5]

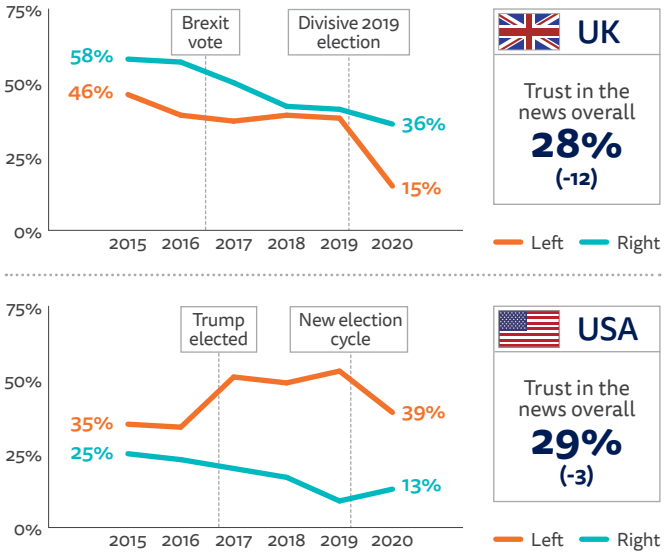
There were also significant falls in the United Kingdom (-12), Mexico (-11), Denmark (-11), Bulgaria (-7), Canada (-8), and Australia (-6) where our poll coincided with bitter debates over the handling of some of Australia's worst-ever bush fires.

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 perhaps because news outlets carry more views that people disagree with.

One recent example of how this works came in the UK election in December 2019 where Boris Johnson asked the people to endorse his Brexit deal. The Tory victory came after a toxic political campaign where the media were heavily criticised by both sides (Fletcher et al. 2020). Many on the left blamed the Labour defeat on unfair media treatment of its leader Jeremy Corbyn by a 'biased press'. The impact can be seen in the next chart with trust amongst respondents who self-identify on the left collapsing from 38% in January 2019 to just 15% a year later. Trust amongst those on the right also declined but by much less.

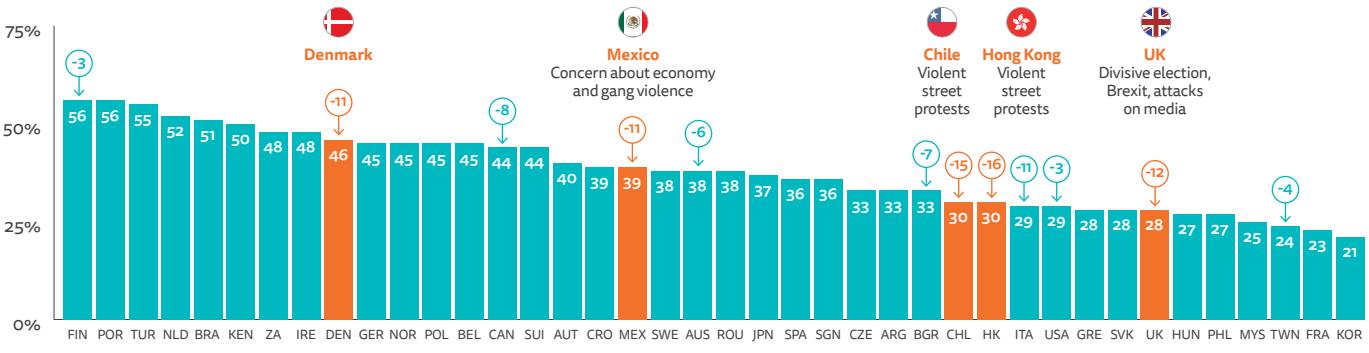
In the United States we observe the same picture but in reverse. It is the right that has lost trust, partly inflamed by the anti-media rhetoric of the president himself. A bruising Democratic Presidential Primary may help account for the decline in trust on the left.

PROPORTION THAT TRUST MOST NEWS MOST OF THE TIME BY LEFT-RIGHT POLITICAL LEANING (2015–20) – UK & USA



Q6_2016_1. Please indicate your level of agreement with the following statement: I think you can trust most news most of the time. **Q1F.** Some people talk about 'left', 'right' and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? *Base: 2015–20 Left/Right: USA ≈ 500/500, UK ≈ 500/300.*

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

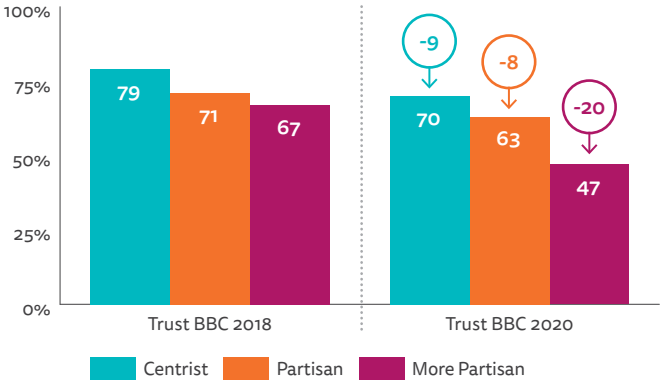


Q6_1. Please indicate your level of agreement with the following statement: I think you can trust most news most of the time. *Base: Total sample in each market ≈ 2000, Taiwan = 1027.*

[5] https://www.aljazeera.com/programmes/listeningpost/2019/11/chile-protests-media-191103105957626.html

Although the left has long had a problem with right-wing bias in the UK press, the Brexit crisis saw the public service BBC increasingly in the firing line. The BBC has a duty to be duly impartial in its news coverage but our data show that, although overall trust in its news remains high, criticism from those who are politically committed (on the left and the right) has grown over the last few years. Trust in the BBC with the most partisan groups has fallen by 20 percentage points since 2018.

PROPORTION THAT TRUST BBC NEWS BY LEVEL OF POLITICAL COMMITMENT (2018 AND 2020) – UK



Q6_2018_trust. How trustworthy would you say **news** from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. **Q1F.** Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? *Base: Centrist/Partisan/More partisan: 2018 = 1018/645/170, 2020 = 1019/536/97. Note centrist = those that selected 'centre', 'slightly left/right of centre', Partisan = 'fairly left/right wing', More partisan = 'very left/right wing'.*

Public service media remain by and large the most trusted brands, especially in Northern European countries where they have a strong tradition of independence. But criticisms from the extremes do seem to be chipping away at this confidence in many countries, especially when combined with anti-elitist rhetoric from populist politicians. Our country and market-based pages clearly show that, though trust remains high, *distrust* of public service media is growing and is often higher than for many other news brands.

For full brand trust scores see section 3: Country and Market pages

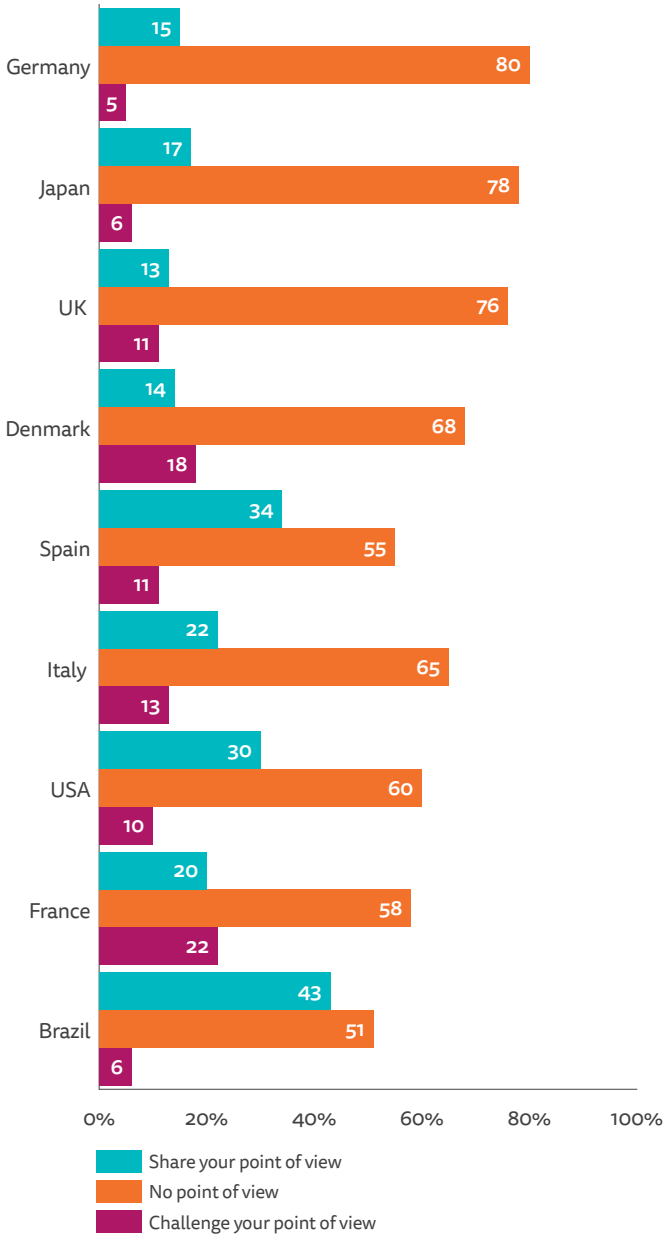
DESPITE PARTISAN PRESSURES, SILENT MAJORITY STILL PREFER 'OBJECTIVE' NEWS

Greater political polarisation has coincided with an explosion of low-cost internet publishing which in turn has led to the widespread availability of partisan opinions online. With news coverage increasingly commoditised, parts of the traditional media have also focused more on strong and distinctive opinion as a way of attracting and retaining audiences. Some commentators have increasingly questioned the value of objective news in a world where people have ready access to news from so many different points of view, while others worry that social media and algorithms are encouraging echo-chambers and pushing communities apart. In this context we were interested to know if consumer preferences for news that reinforce people's views had grown since we last looked at this subject in 2013.

Looking across nine markets we see that the majority in each country say they prefer news with no particular point of view. In a sense this is not surprising given that traditional expectations are that journalists *should* produce neutral and detached news, but the differences between countries are striking.

This preference for neutral news is strongest in Germany, Japan, the UK, and Denmark – all countries with strong and independent public broadcasters. A preference for more partial news is strongest in Spain, France, and Italy – countries that scholars have labelled 'polarised pluralist' (Hallin and Mancini 2004) – as well in the United States.

PROPORTION THAT SAY THEY PREFER TO GET NEWS FROM SOURCES THAT HAVE NO POINT OF VIEW – SELECTED COUNTRIES



Q5c_2020. Thinking about the different kinds of news available to you, do you prefer getting news from sources that share/challenge/have no point of view. *Base: Total sample (excluding don't knows): USA = 1760, UK = 1659, Germany = 1624, France = 1437, Italy = 1762, Spain = 1756, Denmark = 1611, Japan = 1538, Brazil = 1901.*

Comparing 2020 with data from 2013, we see increased preference over time in the UK (+6) for news that has 'no particular point of view'. At the same time, the proportion that prefers news that 'shares their point of view' has declined by a similar amount (-6). It is hard to be sure about the reasons, but one possibility is that a silent majority is reacting against a perceived increase in agenda-filled, biased, or opinion-based news. These themes came out strongly in comments from our survey respondents.

> ***I prefer that news is delivered objectively so individuals are able to analyse what they have heard/read and come to their own conclusions without being unduly influenced.***
> *Female, 61, UK*

A DIFFERENT STORY IN THE UNITED STATES

In the United States, where both politics and the media have become increasingly partisan over the years, we do find an increase in the proportion of people who say they prefer news that shares their point of view – up six percentage points since 2013 to 30%. This is driven by people on the far-left and the far-right who have both increased their preference for partial news sources.

PARTIAL TV AUDIENCES

62% of those who self identify on the right watch Fox (11% from the left)

34% of those who self identify on the left watch CNN (9% from the right)

In the USA, audiences for cable television networks, such as Fox on the right and CNN and MSNBC on the left, are strongly weighted to one view or another. At the same time, the influence of partisan websites (eg Breitbart, the Blaze, the Daily Caller, Occupy Democrats, Being Liberal) grew rapidly ahead of the 2016 election and even today around a quarter (23%) of our sample visits at least one of these each week. In our survey we asked respondents who said they prefer news that 'shares their point of view' to explain why they held that position. Many suggested that it helped avoid political arguments or because they felt they were getting closer to the truth:

> ***I'm tired of hearing fake news from the dishonest left socialist commie traitors!!!***
> *Female, 69, USA survey respondent*

> ***Because CNN, MSNBC tell the truth whereas Fox News is not bound by pure facts.***
> *Female, 73, USA survey respondent*

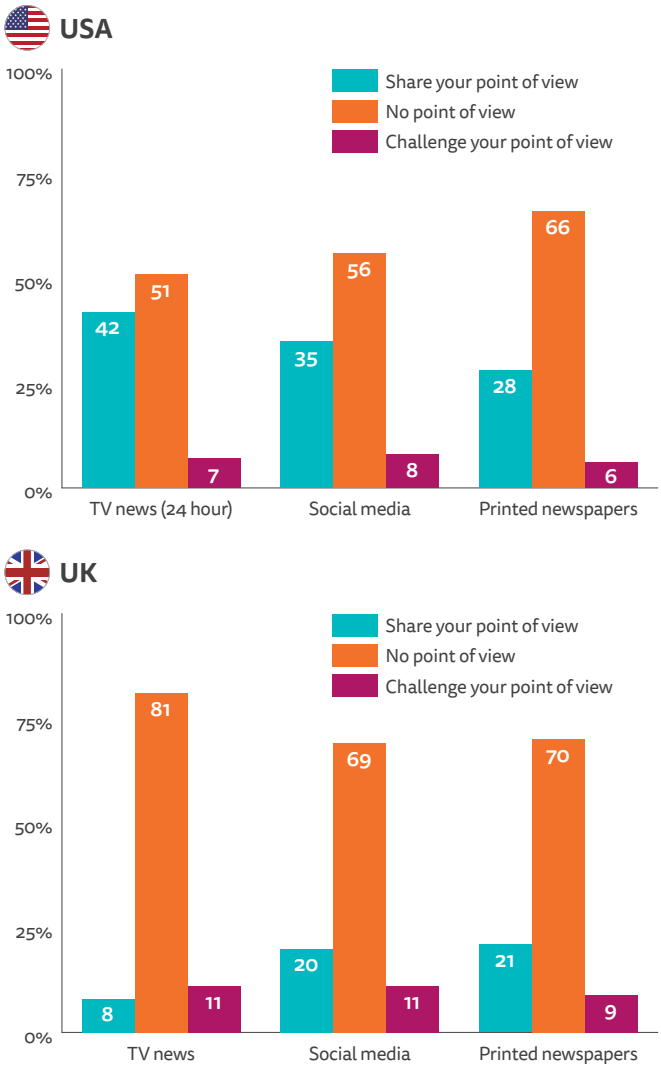
Complaints like this about the media have become increasingly vocal in recent years and yet it is striking that even in the United States a majority (60%) still express a preference for news without a particular point of view. We can also note that, during the coronavirus crisis, partisan websites and TV brands showed stagnant or low traffic growth compared with other brands.[6]

THE ROLE OF THE NEWS SOURCE

It is interesting how people's attitudes to objective, partial, or challenging news is related to the source of news they use most often. In the next chart we can see that in the USA people who regularly use strident 24-hour news channels like Fox and CNN are most likely to prefer partial news, followed by social media and then print.

In the UK we see the reverse picture, with people who use television as main source most likely to prefer neutral or objective news. This is not surprising given that television in the UK has an obligation to be duly impartial and is regulated accordingly. By contrast, those whose main source is a printed newspaper (or social media) are three times as likely to prefer news that shares their point of view. In Spain and Brazil, we see all three media sources being associated with a preference for partial news – and social media playing the biggest role.

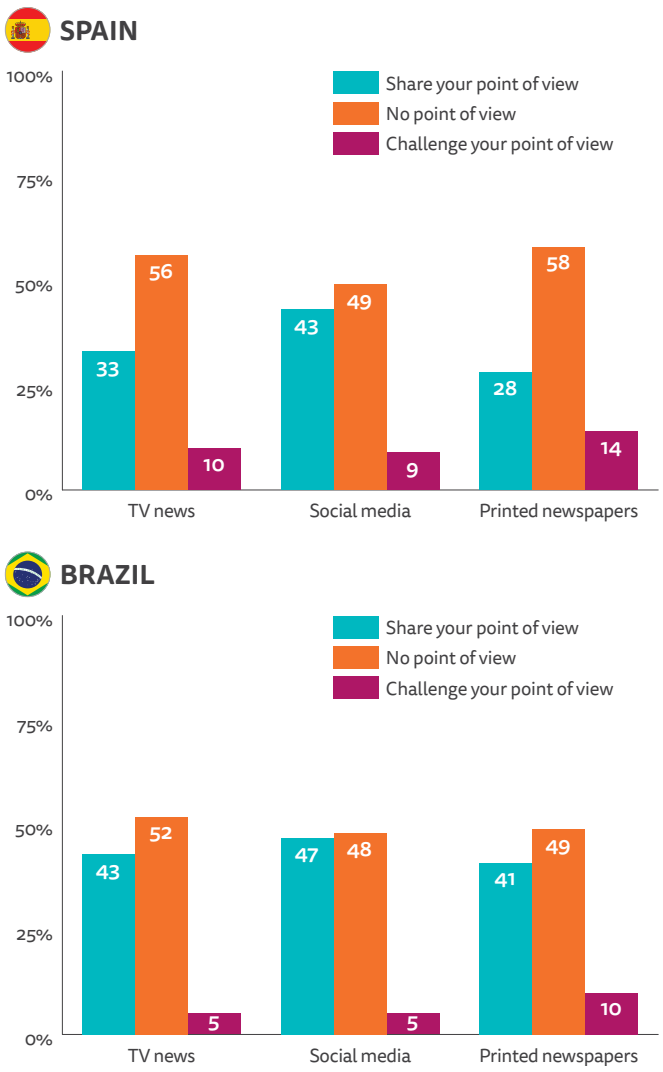
PROPORTION THAT SAY THEY PREFER TO GET NEWS FROM SOURCES THAT HAVE NO POINT OF VIEW BY MAIN SOURCE OF NEWS – SELECTED COUNTRIES



Q5c_2020. Thinking about the different kinds of news available to you, do you prefer getting news from sources that share/challenge/have no point of view. *Base: Total sample (excluding don't knows): USA = 1760, UK = 1659.*

[6] *New York Times* analysis of traffic changes https://www.nytimes.com/interactive/2020/04/07/technology/coronavirus-internet-use.html

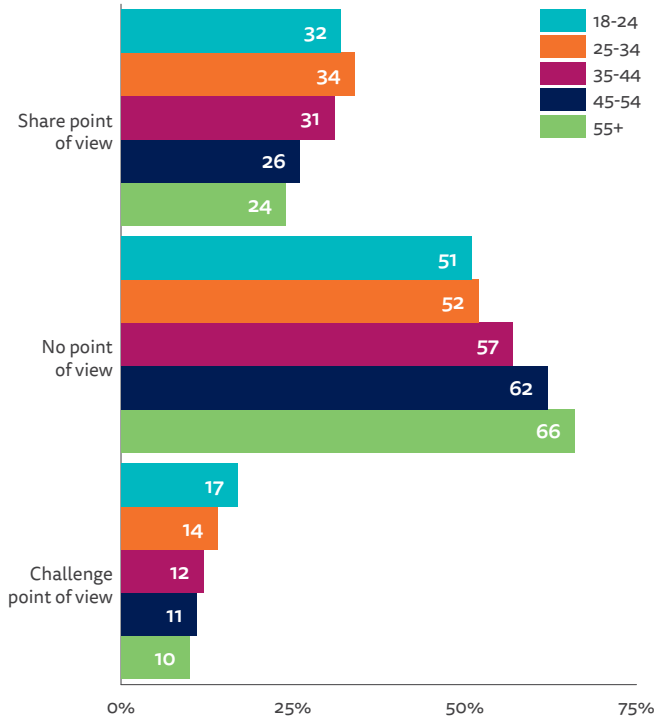
PROPORTION THAT SAY THEY PREFER TO GET NEWS FROM SOURCES THAT HAVE NO POINT OF VIEW BY MAIN SOURCE OF NEWS – SELECTED COUNTRIES



Q5c_2020. Thinking about the different kinds of news available to you, do you prefer getting news from sources that share/challenge/have no point of view. *Base: Total sample (excluding don't knows): Spain = 1756, Brazil = 1901.*

Interpreting notions of objectivity is not an easy task at a time of rising political polarisation, even on issues in which the weight of scientific evidence overwhelmingly favours one side. Public media organisations like the BBC in the UK have faced criticism for adopting a 'he said, she said' approach to coverage of topics such as climate change as they seek to present both sides of arguments. Some UK news organisations have taken a different approach to these issues, with the *Guardian* adopting the term 'climate emergency' to describe the urgency of the story. Our recent qualitative study of news behaviours amongst under-35s showed that younger age groups in particular tend to respond well to approaches and treatments that take a clear point of view (Flamingo 2019). Our survey data also show that, across countries, young people are also less likely to favour news with no point of view.

PROPORTION THAT SAY THEY PREFER TO GET NEWS FROM SOURCES THAT HAVE NO POINT OF VIEW BY AGE – ALL MARKETS



Q5c_2020. Thinking about the different kinds of news available to you, do you prefer getting news from sources that share/challenge/have no point of view. *Base: 18–24 = 8639, 25–34= 12603, 35–44 = 12643, 45–54 = 11605, 55+ = 23773.*

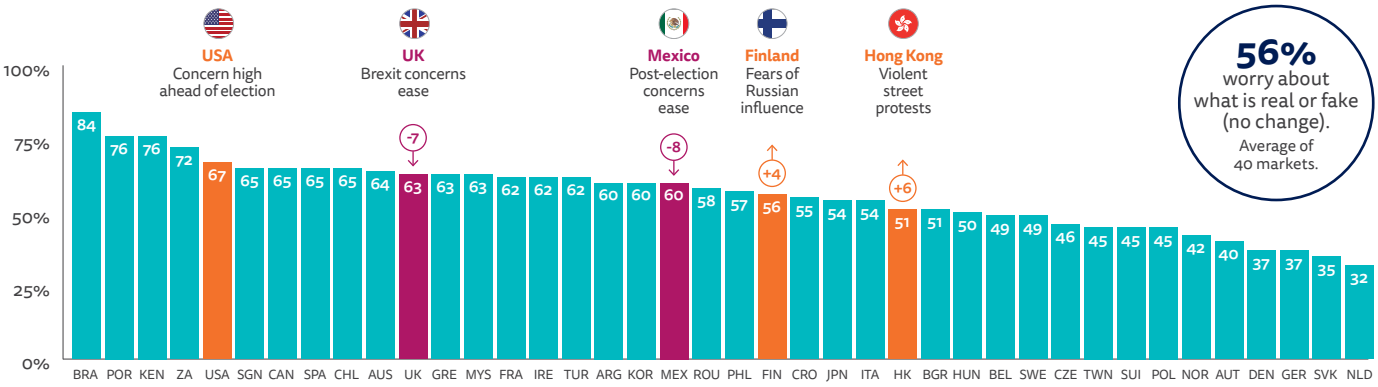
In reality this is not a zero-sum game. Most people like to mix news that they can trust with a range of opinions that challenge or support their existing views. We do find, however, that those with extreme political views are significantly less attracted to objective news – and these are often the same people that are increasingly distrustful of mainstream media. Younger people are more ambivalent. They still turn to trusted mainstream brands at times of crisis but they also want authentic and powerful stories, and are less likely to be convinced by 'he said, she said' debates that involve false equivalence.

MISINFORMATION AND DISINFORMATION

More than half (56%) of our sample across 40 countries remains concerned about what is real and fake on the internet when it comes to news. Concern tends to be highest in parts of the Global South such as Brazil (84%), Kenya (76%), and South Africa (72%) where social media use is high and traditional institutions are often weaker. Lowest levels of concern are in less polarised European countries like the Netherlands, Germany, and Denmark.

The biggest increase in concern came in Hong Kong this year (+6) as the conflict between the government and student protesters continued and also in Finland (+4), where we see higher than average concern over false and misleading information from foreign governments.

PROPORTION CONCERNED ABOUT WHAT IS REAL AND WHAT IS FAKE ON THE INTERNET WHEN IT COMES TO NEWS – ALL MARKETS



Q_FAKE_NEWS_1. Please indicate your level of agreement with the following statement. Thinking about online news, I am concerned about what is real and what is fake on the internet. *Base: Total sample in each market ≈ 2000, Taiwan = 1027.*

Domestic politicians are seen as most responsible (40%) for false and misleading information online, followed by political activists (14%), journalists (13%), ordinary people (13%), and foreign governments (10%). Despite widespread media coverage of alleged attempts by outside powers to undermine elections, it is striking that it is the rhetoric and behaviour of national politicians that is considered the biggest problem. This echoes arguments from scholars that misinformation often comes from the top (and not from ordinary people).

PROPORTION THAT SAY THEY ARE MOST CONCERNED ABOUT FALSE OR MISLEADING INFORMATION FROM EACH OF THE FOLLOWING – ALL MARKETS

40% politicians
More in... **USA, Brazil, Philippines, South Africa**

14% activists
More in... **Hong Kong, Norway, Czech Republic**

13% journalists
More in... **Greece, South Korea, Croatia, USA**

13% ordinary people
More in... **Japan, Taiwan, South Korea**

10% foreign governments
More in... **Denmark, Finland, Germany, Netherlands**

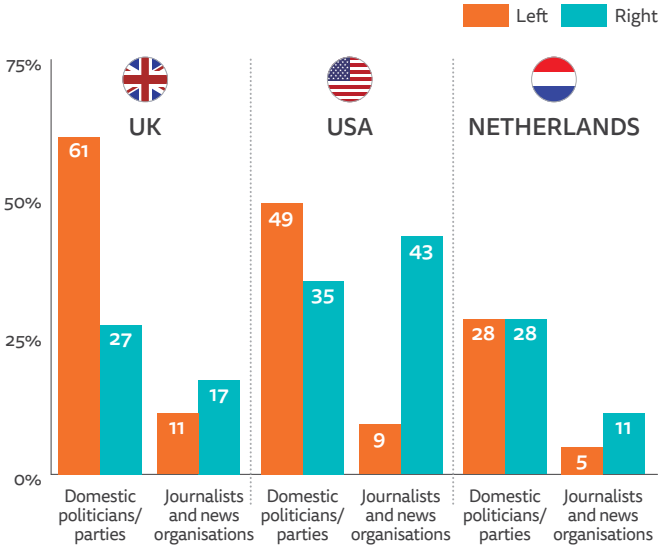
Q_FAKE_NEWS_2020b. Which of the following, if any, are you most concerned about online? False or misleading information from... *Base: Total sample = 80155.*

We see a slightly different pattern in parts of Asia where the behaviour of ordinary people – for example, in sharing false information without considering the consequences – is considered the biggest problem in Japan (27%) and is second only to domestic politicians in Taiwan (29%).

But political starting positions can make a big difference when it comes to assigning responsibility for misinformation. In the most polarised countries, this effectively means picking your side. Left-leaning opponents of Donald Trump and Boris Johnson are far more likely to blame these politicians for spreading lies and half-truths online, while their right-leaning supporters are more likely to blame journalists. In the United States more than four in ten (43%) of those on the right blame journalists for misinformation – echoing the President's anti-media rhetoric – compared with just 35% of this group saying they are most concerned about the behaviour of politicians. For people on the left the situation is reversed, with half (49%) blaming politicians and just 9% blaming journalists.

By contrast, in the Netherlands, there is less political polarisation and less picking of sides required, though those on the right are still twice as critical of the role of journalists.

PROPORTION THAT SAY THEY ARE MOST CONCERNED ABOUT FALSE OR MISLEADING INFORMATION FROM EACH OF THE FOLLOWING BY LEFT-RIGHT POLITICAL LEANING – SELECTED COUNTRIES

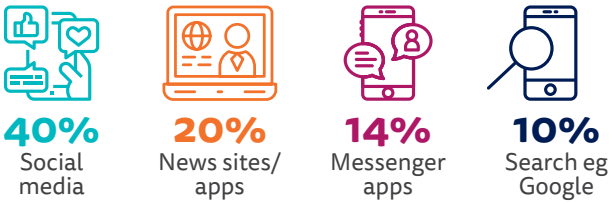


Q_FAKE_NEWS_2020b. Which of the following, if any, are you most concerned about online? False or misleading information from... *Base: Left/Right: UK = 352/283, USA = 507/458, Netherlands = 334/305.*

CHANNELS OF MISINFORMATION

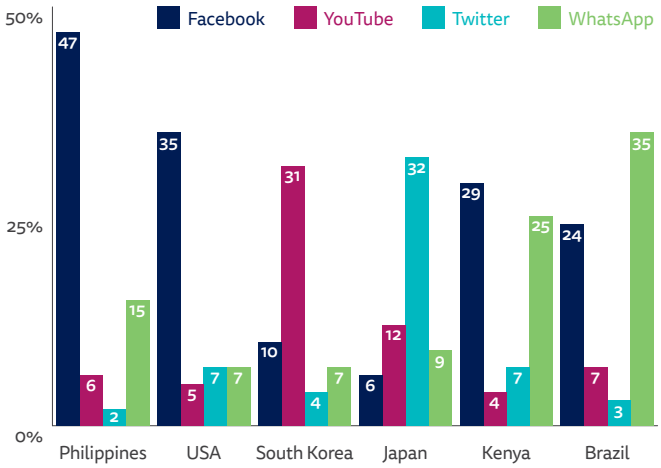
It is perhaps no surprise that people see social media as the biggest source of concern about misinformation (40%), well ahead of news sites (20%), messaging apps like WhatsApp (14%), and search engines such as Google (10%).

PROPORTION THAT SAY THEY ARE MOST CONCERNED ABOUT FALSE OR MISLEADING INFORMATION FROM EACH OF THE FOLLOWING – ALL MARKETS



Q_FAKE_NEWS_2020c. Which of the following, if any, are you most concerned about online? False or misleading information from... *Base: Total sample = 80155.*

MOST CONCERNING PLATFORM FOR FALSE AND MISLEADING INFORMATION – SELECTED COUNTRIES

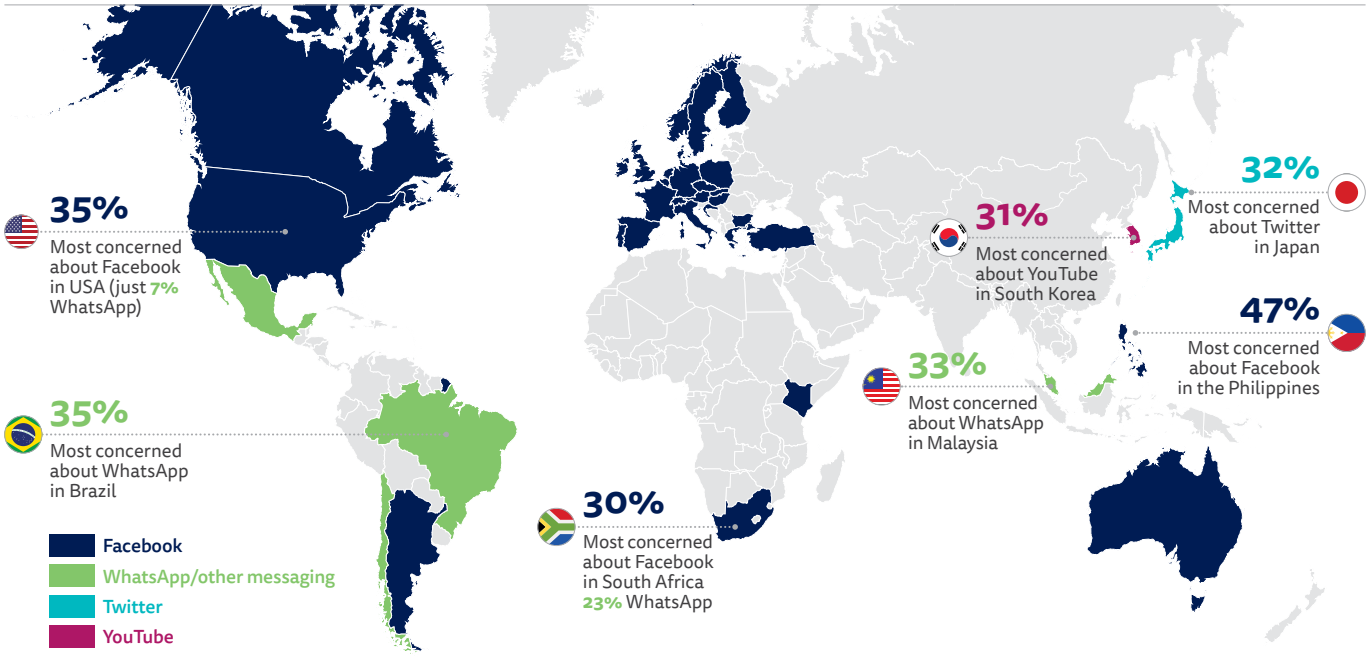


FAKE_NEWS_2020c. Which of the following, if any, are you most concerned about online? Please select one. False or misleading information from... *Base: Total sample in each market ≈ 2000.*

Breaking the social data down further, across all countries 29% say they are most concerned about Facebook, followed by YouTube (6%) and Twitter (5%). But in parts of the Global South, such as Brazil, people say they are more concerned about closed messaging apps like WhatsApp (35%). The same is true in Chile, Mexico, Malaysia, and Singapore. 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. By contrast, in the Philippines (47%) and the United States (35%) the overwhelming concern is about Facebook, with other networks playing a minor role. Twitter is seen to be the biggest problem in Japan and YouTube in South Korea. Facebook is used much less widely in both of these countries.

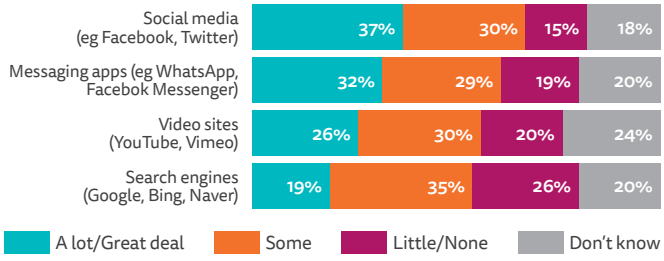
The coronavirus crisis has reminded us that these networks can be used to spread all kinds of damaging misinformation, not just about politics. A range of unsubstantiated conspiracy theories have been doing the rounds including one linking COVID-19 to 5G networks and another suggesting that the virus was a biological weapon originating in a Chinese military research facility – though it is important to note that politicians and the media have also played a role in bringing these ideas to a wider public. In our April survey, almost four in ten (37%) said they had come across a lot or a great deal of misinformation about COVID-19 in social media like Facebook and Twitter, and 32% via messaging apps like WhatsApp.

MOST CONCERNING PLATFORM FOR FALSE AND MISLEADING INFORMATION – ALL MARKETS



FAKE_NEWS_2020c. Which of the following, if any, are you most concerned about online? Please select one. False or misleading information from... *Base: Total sample in each market ≈ 2000, Taiwan = 1027.*

PROPORTION THAT SAY THEY HAVE SEEN FALSE OR MISLEADING INFORMATION ABOUT CORONAVIRUS ON EACH (APRIL 2020) – AVERAGE OF SIX COUNTRIES



Q13 (Apr. 2020). How much false or misleading information about coronavirus (COVID-19), if any, do you think you have seen from each of the following in the last week? *Base: Total sample: USA, UK, Germany, Spain, Argentina, South Korea = 8522.*

Given these concerns, Facebook has stepped up funding for independent fact-checkers and a number of platforms including Facebook, Twitter, and YouTube have taken down misinformation that breached guidelines, including a video from Brazilian President Jair Bolsonaro.[7]

Digital literacy has also been a priority, with a prominent link to trusted information sources pinned at the top of Facebook news feeds in many countries. Algorithms have been tweaked to prioritise official and trusted news sources.

It may be that COVID-19 finally supercharges the fight against misinformation and gives social networks more confidence to take down damaging or dubious content, but these judgements are likely to get more difficult once the immediate crisis is over, the blame game begins, and the cut and thrust of normal politics resumes.

POLITICAL ADS AND FACEBOOK

One flashpoint is likely to be the extent of any intervention by social networks in the run-up to the US presidential election in November. A burning question is the extent to which social networks should remove misleading advertising from politicians standing for election. Facebook has exempted candidates from normal fact-checking processes but has increased transparency so it is clear what campaigns are being run and how much is being spent. Twitter has taken a different view and has restricted political ads on its platform entirely.

In our January survey we find that 58% of our respondents think that misleading ads should be blocked by social media companies, with just a quarter (26%) thinking it should not be up to technology companies to decide what is true in this context. Support for blocking such ads was strongest in countries like Germany, France, and the UK where political advertising is already tightly controlled, and was weakest in countries that have traditionally worried about regulating free speech – such as the United States and the Philippines.

By contrast people are less keen on media companies omitting potentially misleading statements by candidates in the course of a campaign. Over half (52%) say that news organisations should report statements prominently because it is important to know what the politicians said. This is consistent with our earlier data which suggest the majority of 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.

For further analysis see section 2.3: How do People Want the Media to Cover Politics?

[7] https://news.sky.com/story/coronavirus-brazil-president-refuses-to-ramp-up-covid-19-lockdown-as-facebook-pulls-video-11966279

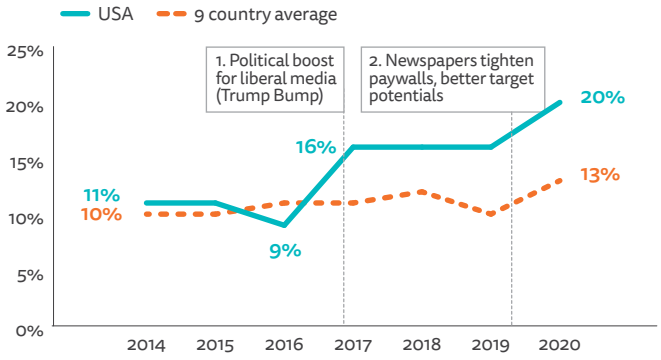
CHANGING BUSINESS MODELS AND THE GROWTH OF PAID CONTENT

It is too early to predict the full impact of the COVID-19 crisis on the news industry but it is almost certain to be a catalyst for more cost-cutting, consolidation, and even faster changes in business models. While some publications report growth in digital subscriptions, some publishers say advertising revenue has fallen by up to 50% and many newspapers have cut back or stopped printing physical copies and laid off staff.[8] In Australia, News Corporation suspended print production of around 60 newspapers, while in the UK analysts warn that as many as a third of journalists in the media could lose their job as a result of the pandemic.[9] All of this puts more focus on reader payment models online – including subscription, membership, donation, and micropayment – and on the issue of trust which underpins these.

In the last 12 months more publishers have started charging for content or tightening paywalls and this is beginning to have an impact. Across countries we have seen significant increases in the percentage paying for online news, including a jump of four percentage points in the United States to 20% and eight points in Norway to 42%. We've also seen increases in Portugal, the Netherlands, and Argentina, with the average payment level also up in nine countries that we have been tracking since 2013.

Looking back, we can detect two clear waves of subscription growth in the United States. The first was sparked by the election of Donald Trump, with many younger and liberal voters looking to support publications that could hold the President to account. This year's uptick may be partly driven by a new election cycle but also by publisher tactics to restrict the amount of content people can see for free combined with special deals.

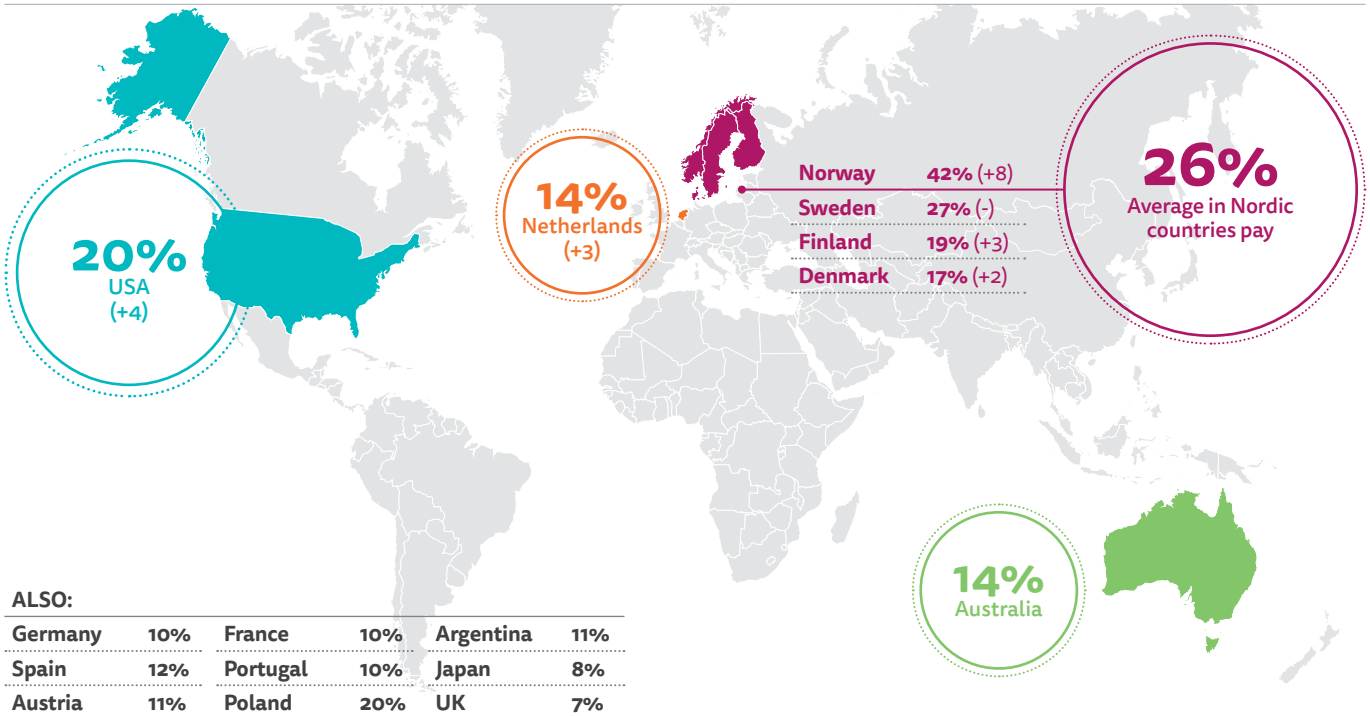
PROPORTION THAT PAID FOR ANY ONLINE NEWS IN LAST YEAR (2014–20) – SELECTED COUNTRIES



Q7a. Have you paid for ONLINE news content, or accessed a paid-for ONLINE news service in the last year? *Total 2014–20 samples ≈ 2000. Note: 9 country average includes USA, UK, France, Spain, Italy, Germany, Denmark, Japan, and Finland.*

In the wake of the pandemic, the *New York Times* and the *Atlantic* are among US publications reporting substantial increases in digital subscriptions while the *Guardian* has seen a boost to the numbers of contributors. Some publishers have emphasised the value of trusted and accurate journalism through a series of coronavirus-themed messaging campaigns designed to increase subscriptions or donations. But the crisis has also raised new dilemmas around paywalls, with many news organisations like the *New York Times* and *El Pais* in Spain dropping their paywalls for a time. Others like the *Financial Times* have offered a subset of content for free to ensure that critical public health content was available to all.

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



ALSO:

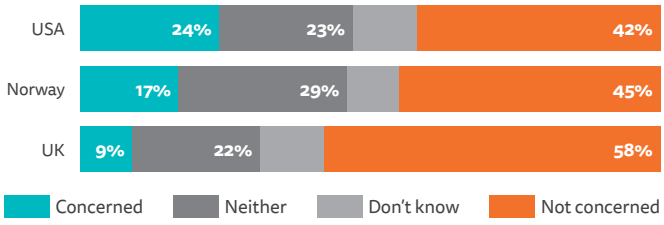
Germany	10%	France	10%	Argentina	11%
Spain	12%	Portugal	10%	Japan	8%
Austria	11%	Poland	20%	UK	7%

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.*

[8] https://www.poynter.org/business-work/2020/a-qa-with-tampa-bay-times-chairman-and-ceo-paul-tash-about-the-times-print-reduction
[9] https://www.endersanalysis.com/reports/enders-analysis-calls-government-support-news-magazine-media

Many fear growing levels of information inequality, where people with less money become more dependent on social media and other low-quality news while those who can afford it get better information. Currently levels of concern about this issue from respondents are highest in the United States (24%) and Norway (17%). Lower concern in the United Kingdom (9%) may be because of widespread availability of high-quality free news from the BBC News website, many widely read popular newspapers and digital-born titles, and titles like the *Guardian*, with its open donation model.

PROPORTION CONCERNED THAT OTHERS MAY BE MISSING OUT ON NEWS BECAUSE OF PAYWALLS – USA, NORWAY, UK



P3_2020_1. Some news providers now charge money for access to their online news content. How concerned are you, if at all, that other people might be missing out on news from sources that they have to pay for? *Base: USA = 2055, UK = 2011, Norway = 2010.*

WINNER-TAKES-MOST IN SUBSCRIPTIONS

This year we conducted a second more detailed survey in three countries (USA, UK, and Norway) to understand more about patterns and attitudes to online news payment. This research clearly shows that a few large national news brands have been the biggest winners in all three countries. Around half of those that subscribe to any online or combined package in the United States use the *New York Times* or the *Washington Post* and a similar proportion subscribe to either *The Times* or the *Telegraph* in the UK, though in much smaller numbers. In Norway the quality newspaper *Aftenposten* leads the field (24% of those that pay), along with two tabloid newspapers that operate premium paywall models, *VG* (24%) and *Dagbladet* (14%). One surprise in these data is the extent to which people subscribe to local and regional newspapers online in Norway (64%). Most local news publishers in Norway charge for online news, with a total of 129 different local titles mentioned by our respondents. In the United States 30% subscribe to one or more local titles, with 131 different titles mentioned. By contrast in the UK only a handful of local publishers have put up a paywall.

PROPORTION WITH ACCESS TO PAID NEWS THAT HAVE ACCESS TO EACH BRAND – UK, USA, 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 to pay for that you currently have access to. *Base: All who have access to a single news brand: USA = 584, UK = 256, Norway = 751.*

In all three countries the majority of those who pay only subscribe to one title, but in Norway more than a third (38%) have signed up for two or more – often a national title and a local newspaper. It is a similar story in the United States with 37% taking out two or more subscriptions, with additional payment often for a magazine or specialist publication such as the *New Yorker*, the *Atlantic* or The Athletic (sport). By contrast, in the UK a second or third subscription is rare, with three-quarters (74%) paying for just one title.

In the UK and Norway, three-quarters (75%) pay for subscriptions with their own money, around 5% are on a free trial, with the rest paid for by someone else (by work or a gift). The free trials seem to be twice as prevalent in the United States (10%), where competition for a limited pool of subscribers is extremely fierce.

For further results from our detailed pay survey see section 2.1: How and Why People are Paying for Online News

Donations for news are relatively new, though Wikipedia and National Public Radio have generated much of their income this way for many years. Our survey showed a growing array of publications to which people are prepared to give money. In the United States 4% now say they donate money to a news organisation, 3% in Norway, and 1% in the UK. The *Guardian* has one of the most successful donation models of any major brand, with over a million people having contributed in the last year.[10] According to our data, almost half of all the relatively small number of donations in the UK (42%) go to the *Guardian*, but most are one-off, with an average payment of less than £15. Other beneficiaries include small community websites such as the Bristol Cable, YouTube channels, and podcasts such as the one produced by the investigative co-operative Bellingcat.

In looking through the donation lists, it is striking to see so many political partisan websites such as The Daily Kos and Patriot Post in the US and The Canary and Novara media in the UK. In Norway, a significant number of donations to news services go to one of three far-right websites, Resett, Document, and HRS. With advertisers increasingly wary of controversial political content, donations are proving one important way to tap into the loyalty of committed partisans.

[10] 1.16m have contributed, including 821,000 ongoing monthly donations (and subscriptions). https://www.theguardian.com/media/2020/apr/29/guardian-reports-surge-in-readers-support-over-past-year

PROPORTION OF DONATERS THAT DONATE TO EACH BRAND – UK, USA, NORWAY

UK	USA	Norway
Guardian **42%**	Guardian **13%**	Resett **13%**
Wikipedia **13%**	National Public Radio **11%**	Document **7%**

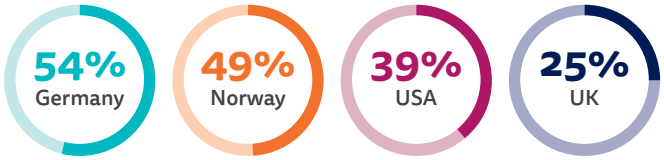
DONATE2. You say you currently donate to a news brand. Which brands do you donate to?
Base: All those who have donated: UK = 197, US = 433, Norway = 211.

After the 2008 economic crash many publishers saw advertising revenues drop by around a third and many worry that the aftermath of the COVID-19 pandemic could be even worse. Online subscriptions and donations may make up for some of this, especially at a time when trusted news matters more than ever, but for most publishers any extra reader revenue won't be nearly sufficient. Industry expectations need to be realistic as many people are likely to have less disposable income and the majority of non-payers are still broadly happy with free sources.

UNCERTAIN FUTURE FOR LOCAL NEWS

The COVID-19 disruption is likely to hit local news providers hardest, given their continuing dependence on both print and digital advertising. Commercial local newspapers in particular are a key component of democracy in many countries, employing the majority of journalists, highlighting local issues, and holding politicians to account. In Denmark, Sweden, and some other countries the government has stepped in to provide subsidies and short-term relief for the sector.[11] Without more support further closures and cuts seem inevitable. But how much would people miss their local newspapers if they were no longer there?

PROPORTION OF READERS WHO WOULD MISS THEIR LOCAL NEWSPAPER A LOT – SELECTED COUNTRIES



L4_2020. How much would you miss your local newspaper/website if it went out of business? Showing code 'a lot'. *Base: Those who consume local newspapers in last week. Germany = 1136, Norway = 1283, USA = 730, UK = 835.*

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 federal Germany (54%) say they would miss them 'a lot' if they were no longer there, 49% in Norway, and 39% in the United States. By contrast only 25% of those who regularly read newspapers in the UK, 18% in Argentina, and 13% in Taiwan say the same. The value placed on local news seems to be partly related to the importance that countries place on their regions more generally – and the extent to which local politics matters.

In federated systems like Germany and the United States local newspapers play a critical role in providing accountability and this is reflected in these scores. The value that people place on their local newspaper is closely correlated with the higher subscription and donation rates that we see for local news in Norway and the United States when compared to the UK.

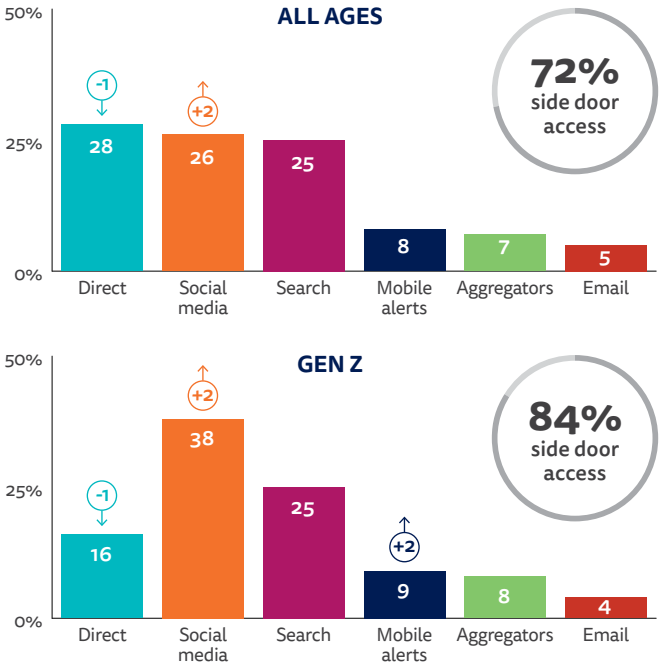
For further analysis see section 2.4: Global Turmoil in the Neighbourhood: Problems Mount for Regional and Local News

GATEWAYS AND INTERMEDIARIES

In terms of access points for online news, habits continue to become more distributed – as more and more people embrace various digital platforms that were initially used most intensely by younger people. Across all countries, just over a quarter (28%) prefer to start their news journeys with a website or app, followed by social media (26%) – up two percentage points on last year. Once again, though, we see very different patterns with 18–24s, the so-called Generation Z. This group has a much weaker direct connection with news brands (16%) and is almost twice as likely to prefer to access news via social media (38%).

If younger groups cannot be persuaded to come to specific websites and apps, publishers may need to focus more on how to build audiences through third-party platforms like Facebook, Twitter, YouTube, and Snapchat. This may become more attractive for publishers now Facebook has started to offer direct payments for its dedicated 'news tab', but aggregated environments have not yet proved a good environment to build the loyalty and attribution that will be needed for long-term relationships.

MAIN GATEWAYS TO NEWS – ALL MARKETS



Q10a. Which of these was the MAIN way in which you came across news in the last week?
Base: All/18-24s that came across online news in the last week: All markets = 74181/9083.

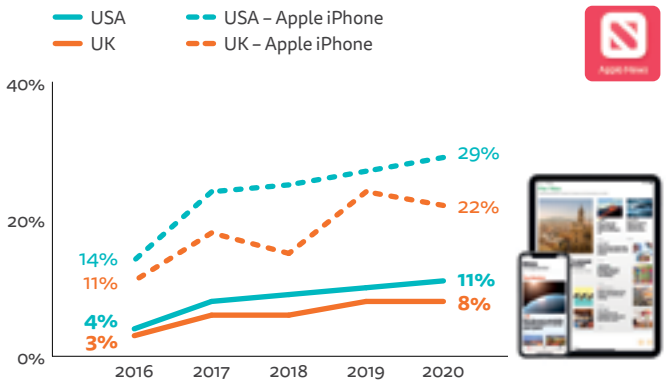
[11] https://euobserver.com/coronavirus/147956

MOBILE AGGREGATORS

Some publishers have been reporting significant increases in referrals from mobile apps such as Apple News, Upday, and various Google products including Google News and Google Discover. Some of these (Apple News and Google) are very hard to measure in surveys because respondents often cannot recall these services – especially if they access via a notification. Apple News is still only available in a few countries but is accessed by 29% of iPhone users in the United States and 22% in the UK. Our data suggest that the premium Apple News + ($9.99 a month) has not yet had much impact outside the US, where the service includes content from the *Wall Street Journal* and the *Los Angeles Times*.

Aggregators remain more important in some countries (South Korea, Japan) than others but overall access remains constant at around 7% and there has been little movement in the headline numbers for specific apps. Line News reaches 22% and Gunosy 12% in Japan each week, while Kakao Channel (25%) is a popular mobile aggregator in South Korea. TopBuzz, an artificial intelligence (AI) driven aggregator that often surfaced low quality news, is being closed down after attracting low levels of usage in western countries, though it was becoming popular in countries in the Global South such as the Philippines (9%), Kenya (11%), and Brazil (9%).

PROPORTION OF iPHONE USERS THAT USE APPLE NEWS (2016–20) – USA AND UK



Q10c. When using the internet for news, have you used any of the following sites or mobile apps that aggregate different news links in the last week? *Base: All/Apple iPhone users 2016–20: USA ≈ 2055/530, UK ≈ 2011/583.*

PROPORTION THAT USED EACH MOBILE AGGREGATOR IN THE LAST WEEK – SELECTED COUNTRIES

	Google News	Apple News	Upday	Flipboard
USA	17%	11%	3%	4%
UK	6%	8%	2%	2%
Germany	14%	5%	5%	2%
France	20%	5%	3%	2%
Spain	n/a	7%	6%	5%
Japan	21%	5%	2%	1%
All markets	**23%**	**7%**	**5%**	**3%**

Q10c. When using the internet for news, have you used any of the following sites or mobile apps that aggregate different news links in the last week? *Base: Total sample in each market ≈ 2000.*

PUBLISHERS FIGHT BACK WITH EMAIL AND OTHER LOYALTY TACTICS

Faced with the growing power of platforms, publishers have been working hard to build direct connections with consumers via email, mobile alerts, and podcasts. Across countries, around one in six (16%) access news each week via email, with most of these (60%) accessing a briefing of general or political news, often sent in the morning. But publishers have been extending the range of formats, increasingly offering 'pop up emails' on subjects like coronavirus and the 2020 presidential elections. Emails have proved effective in attracting potential new subscribers, as well as encouraging existing users to come back more frequently.

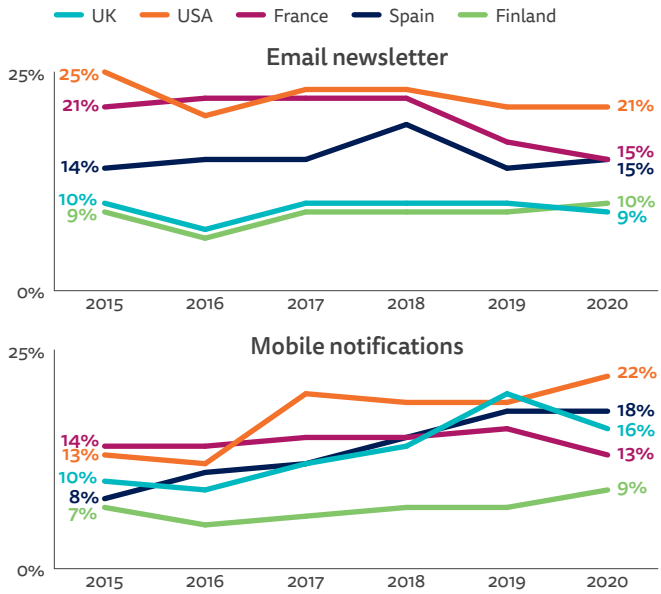
Despite this revival in the newsletter format we find surprising differences in the level of adoption across countries. In the United States one in five (21%) access a news email weekly, and for almost half of these it is their *primary* way of accessing news. Northern European countries have been much slower to adopt email news channels, with only 10% using email news in Finland and 9% in the UK.

The *New York Times* now offers almost 70 different scheduled emails, with the popular morning briefing now reaching 17 million subscribers. The size and importance of this audience has meant an increased profile for flagship emails, with senior journalists appointed as hosts to help guide users through the news each day.[12]

Americans get, on average, more emails from different news providers (4) compared with Australians (3) or British (3). Across countries almost half (44%) say they read most of their news emails. Emails tend to be most popular with older age groups, while mobile notifications are more popular with the young and continue to grow in many countries.

For further analysis see section 2.2: The Resurgence and Importance of Email Newsletters

PROPORTION THAT USED EACH AS A WAY OF GETTING NEWS IN THE LAST WEEK (2015–20) – SELECTED COUNTRIES



Q10. Thinking about how you got news online (via computer, mobile or any device) in the last week, which were the ways in which you came across news stories? *Base: Total sample in each market 2015-20 ≈ 2000.*

[12] https://www.niemanlab.org/2020/04/the-new-york-times-morning-email-newsletter-is-getting-an-official-host-and-anchor

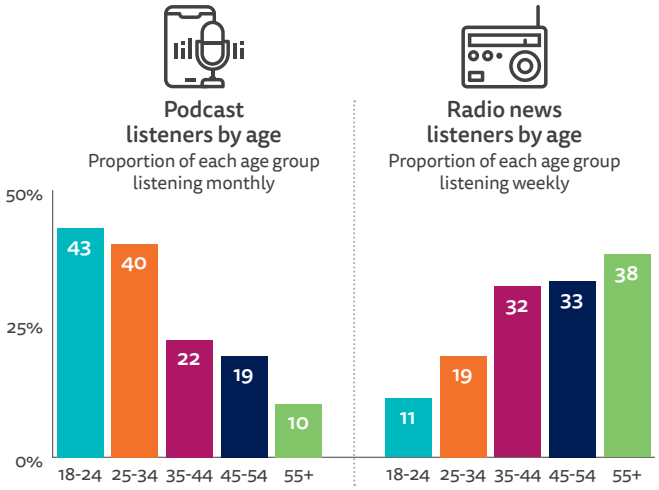
PODCASTS AND THE RISE OF AUDIO

In the last few years podcasts have become another important channel for driving loyalty to specific news brands. The Daily from the *New York Times* attracts 2 million listeners a day and, although the advertising revenue is substantial, the main strategic aim is to attract new subscribers and to build habit with existing ones (Newman and Gallo 2019). The *Guardian* (UK), *Aftenposten* (Norway), and *Les Echos* (France) are amongst publishers to have launched successful daily news podcasts in the last two years. During the coronavirus lockdowns some podcast listening reportedly fell by up to 20% – a reminder of how integral podcasts have become to commuting habits and other activities outside the home.[13] At the same time, listening to other types of podcasting has shifted to the home and there have been some breakout hits, including *Das Coronavirus-Update*, a 30-minute show featuring one of Germany's top virologists, which reached No. 1 in the podcast charts there.

The underlying picture remains one of growth. Our data show an overall rise in podcast listening to 31% (+3) across a basket of 20 countries we have been tracking since 2018. Almost four in ten access 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.

Podcast listeners tend to be *younger* (see next chart) and mainly listen via headphones/mobile phones. These demographics and habits are not just of interest to subscription businesses but also to broadcasters who, as we've already noted, are finding it harder to reach under-35s through linear programming. In the UK half of all podcasts are listened to by under-35s, despite these making up just a third of our sample. By contrast, the majority of those listening to traditional news bulletins and programmes on the radio each week are over 50.

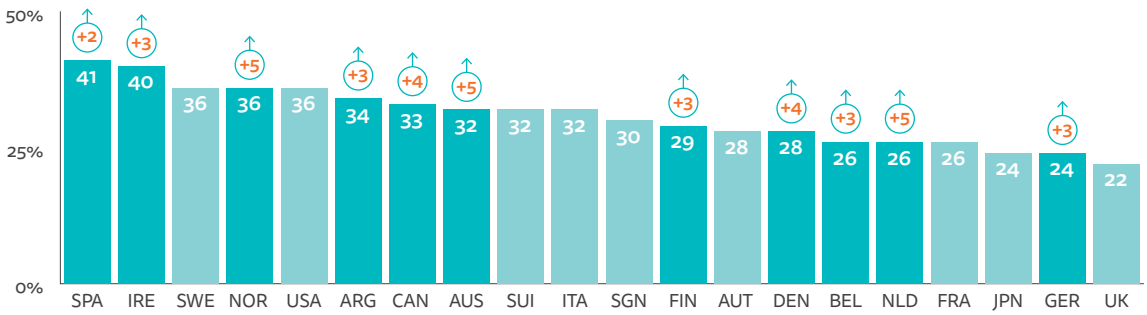
PROPORTION THAT USED A PODCAST IN THE LAST MONTH AND RADIO NEWS IN THE LAST WEEK BY AGE – UK



Q11F. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month?
Q3. Which, if any, of the following have you used in the last week as a source of news?
Base: 18–24/25–34/35–44/45–54/55+ = 201/282/343/349/836.

Many podcasts contain an informational element (sport, lifestyle, true crime) but podcasts specifically about news and politics are amongst the most widely listened to. About half of podcast users listen to a news podcast in the US, where the market has developed furthest. Podcast users in the United States say that the format gives greater depth and understanding of complex issues (59%) and a wider range of perspectives (57%) than other types of media.

PROPORTION THAT USED A PODCAST IN THE LAST MONTH – SELECTED COUNTRIES



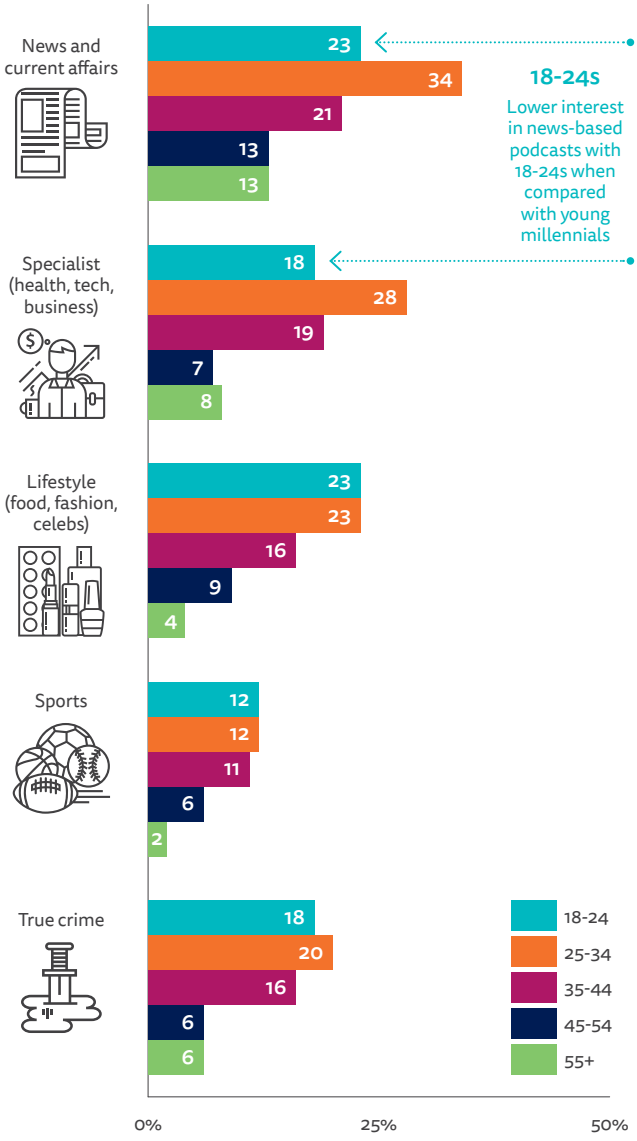
31% access a podcast monthly, up from 29% in 2019

Q11F. A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcast have you listened to in the last month? Please select all that apply. *Total sample in each market ≈ 2000. Note: We excluded markets with more urban samples as well as those where we are not confident that podcasts is a term sufficiently well understood to produce reliable data.*

[13] https://podnews.net/article/coronavirus-covid19-affecting-podcasting

News podcasts are most popular with 25–34s (young millennials). Those aged 18–24 are less likely to listen to news podcast but are some of the heaviest consumers of lifestyle and celebrity podcasts as well as true crime.

PROPORTION THAT USED EACH TYPE OF PODCAST IN THE LAST MONTH BY AGE – USA



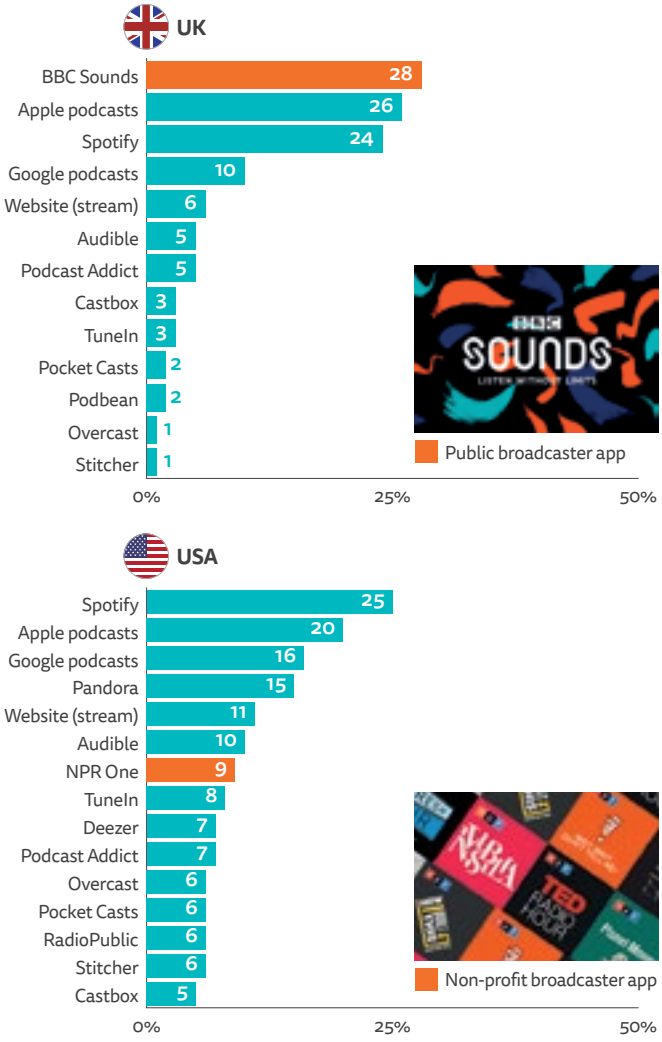
Q11F. A podcast is an episodic series of digital audio files, which you can download, subscribe or listen to. Which of the following types of podcast have you listened to in the last month?
Base: 18–24/25–34/35–44/45–54/55+ = 258/378/348/243/828.

The deep connection that many podcasts seem to create could be opening up opportunities for paid podcasts, alongside advertising-driven models. Almost four in ten Australians (39%) said they would be prepared to pay for podcasts they liked, 38% in the United States, and a similar number in Canada (37%). Willingness to pay was lower in Sweden (24%) and the UK (21%) where so many popular podcasts come from free-to-air public broadcasters.

WHICH PLATFORMS DO PEOPLE USE TO ACCESS PODCASTS?

Podcasts have traditionally been associated with Apple devices, but that is changing rapidly. In the last 18 months Spotify has invested over $500m in podcasting and has reported a doubling of podcast listens.[14] Broadcaster apps like BBC Sounds, ABC Listen (Australia), NPR One (USA), and SR Play (Sweden) now offer original podcasts in addition to live and catch-up radio. Google has started to promote podcasts within search and has revamped its own podcast service. Our data from the UK show BBC Sounds (28%) is similar to Apple (26%) and Spotify (24%) in terms of access, while Spotify (25%) is now ahead of Apple (20%) and Google (16%) in the United States. The US has a much larger ecosystem of widely used smaller podcast apps and services including TuneIn, Podcast Addict, and Stitcher. Spotify (40%) is ahead in Sweden, the country of its birth and also in Australia (33%). In Sweden the national radio broadcaster reaches more than a quarter of podcast users.

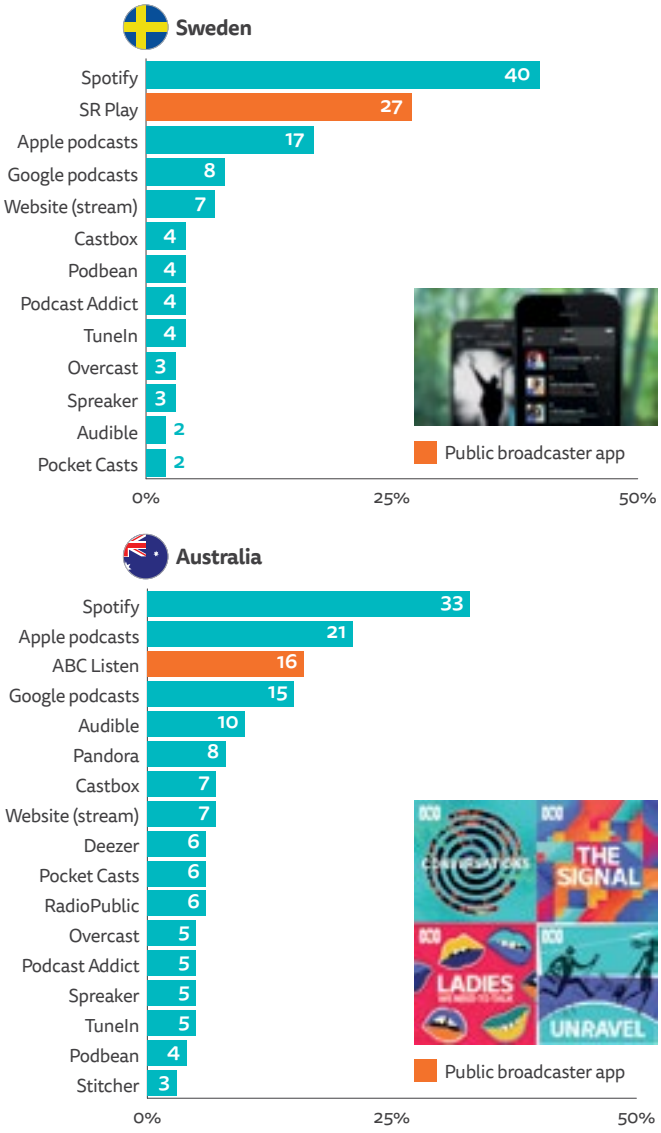
PROPORTION OF PODCAST LISTENERS THAT USE EACH PLATFORM – SELECTED COUNTRIES



POD2. Which of the following apps or websites do you mainly use to find and play podcasts?
Base: All that listened to podcasts in the last month: UK = 440, USA = 746.

[14] https://www.theverge.com/2020/2/5/21123905/spotify-earnings-q4-2020-podcasting-investment-operating-loss

PROPORTION OF PODCAST LISTENERS THAT USE EACH PLATFORM – SELECTED COUNTRIES



POD2. Which of the following apps or websites do you mainly use to find and play podcasts? *Base: All that listened to podcasts in the last month: Sweden = 741, Australia = 690.*

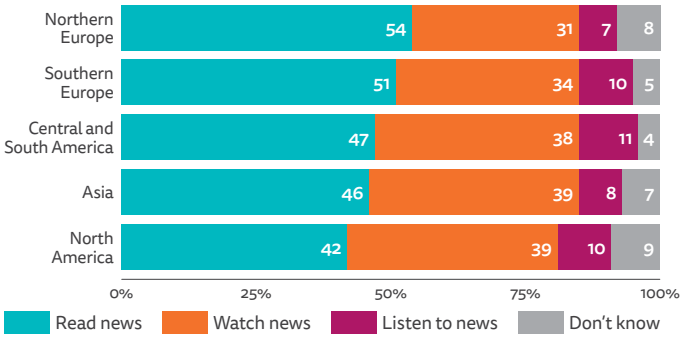
Spotify's move into podcasts, which includes commissioning its own high-quality original content, is bringing audio programming to a wider and more mainstream audience but it is also raising new questions for public broadcasters. Many worry that aggregators will take much of the credit/attribution for public content and are building up their own platforms instead. Some are withholding content from Spotify and Google or are previewing it first in their own apps. Broadcasters have also been losing presentation and production talent to newspaper groups, platforms, and independent studios.

HAS READING HAD ITS DAY ONLINE?

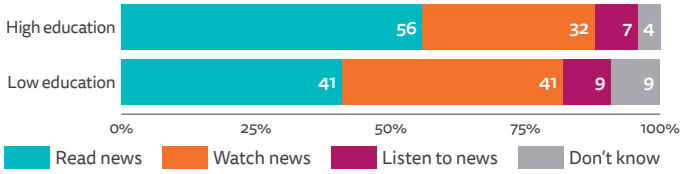
For many years bandwidth and technical limitations meant online news was largely restricted to text and pictures. But now, in most parts of the world, it is possible to seamlessly watch news videos or listen to on-demand audio as well. But what do consumers prefer? Reading text is convenient, but can be difficult on small smartphone screens, and a desire to get away from screens may be one factor driving the current boom in audio listening, according to research (Newman 2018).

We find that, on average, across all countries, people still prefer reading news online, but a significant proportion now say they prefer to watch, with around one in ten preferring to listen. Parts of the world with strong reading traditions such as Northern Europe are most keen on text (54%), while our sample of Asian and American markets is more equally split. The Philippines and Hong Kong are two markets where a majority say they prefer to watch news online rather than read (55% and 52% respectively). Across markets we also find that people with lower levels of education are more likely to want to watch online news, compared with the better educated– a finding which reflects traditional offline preferences around television and print.

PROPORTION THAT PREFER TO READ, WATCH OR LISTEN TO NEWS – SELECTED REGIONS



PROPORTION THAT PREFER TO READ, WATCH OR LISTEN TO NEWS BY EDUCATION – ALL MARKETS



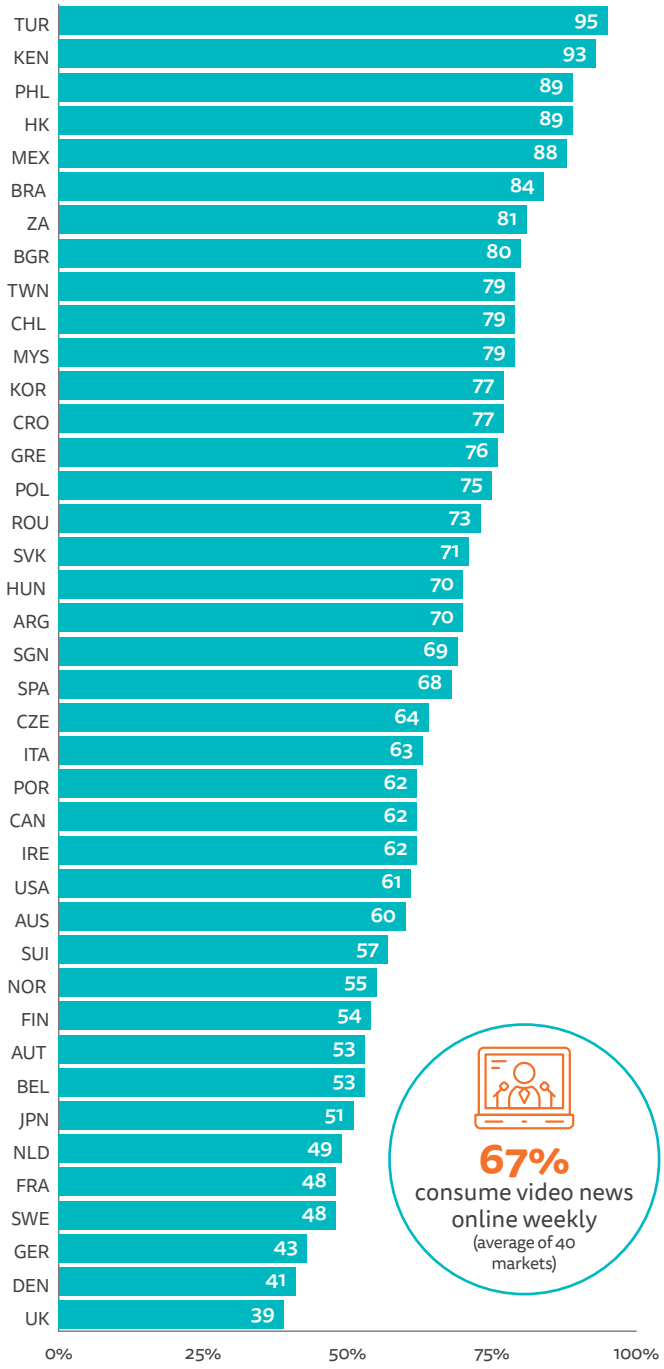
OPTQ11D_2020. In thinking about your online habits around news and current affairs which of the following statements applies best to you? *Base: Northern Europe = 22281, Southern Europe = 8071, Central and South America = 8093, North America = 4057, Asia = 11387, high education = 30258, low education = 12993.*

Perhaps more surprisingly, we find that in a number of countries including the UK, Australia, France, and South Korea, younger people (under-35s) are more likely to say they prefer to read rather than watch news online. We know that the young consume more video news than older people because they are more exposed via Facebook and YouTube, but the speed and control that comes through reading often seems to trump this when it comes to underlying preference.

VIDEO CONSUMPTION ACROSS COUNTRIES

Looking at absolute consumption of different kinds of video news we also see interesting regional differences in line with these stated preferences. Nine in ten of the online population say they access video news online weekly in Turkey (95%), Kenya (93%), the Philippines (89%), and Hong Kong (89%), but only around half this proportion do in Northern European countries such as Germany (43%), Denmark (41%), and the UK (39%).

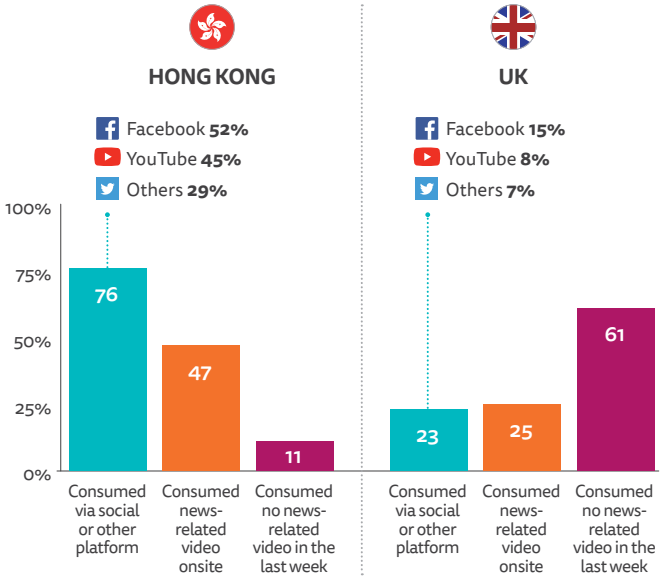
PROPORTION THAT ACCESSED ONLINE NEWS VIDEO IN THE LAST WEEK – ALL MARKETS



Q11_VIDEO. Thinking about consuming online news video (of any kind) over the last week, which of the following did you do? *Base: Total sample in each market = 2000, Taiwan = 1027. Note: Turkey and Kenya are urban samples that will inflate figures.*

Across countries over half (52%) access video news via a third-party platform each week, such as YouTube, Facebook, and Twitter, with a third (33%) accessing via news websites and apps. But again, we find very significant differences between markets. In Hong Kong three-quarters (76%) access video news via third-party platforms but this figure is less than a quarter (23%) in the UK.

PROPORTION THAT ACCESSED ONLINE NEWS VIDEO VIA EACH PLATFORM IN THE LAST WEEK – HONG KONG AND UK



Q11_VIDEO. Thinking about consuming online news video (of any kind) over the last week, which of the following did you do? *Base: Total sample: Hong Kong = 2023, UK = 2011.*

The popularity of social networks and video platforms in Asia, Latin America, and Africa seems to be stimulating video consumption at the expense of text – even if most people consume a mix of the two.

Even in Europe a number of publishers have stepped up investment in video formats. The German public broadcaster ARD has recently made vertical video a central feature of its Tagesschau app.

Swiss publisher Ringier has launched Blick TV, a 15-minute news show that is broadcast online but updated through the day, while rival 20 Minuten is significantly increasing its video production.

The big dilemma for publishers, however, is how to monetise video, which has proved difficult for shorter news items. Publishers like the *New York Times*, Vox, and BuzzFeed have been focusing on longer form linear commissions aimed at online streaming services and cable TV.

Consumer preferences around video and audio are changing, opening up new possibilities for publishers, but shifting resources from text carries significant risks while the commercial returns are still far from proven.

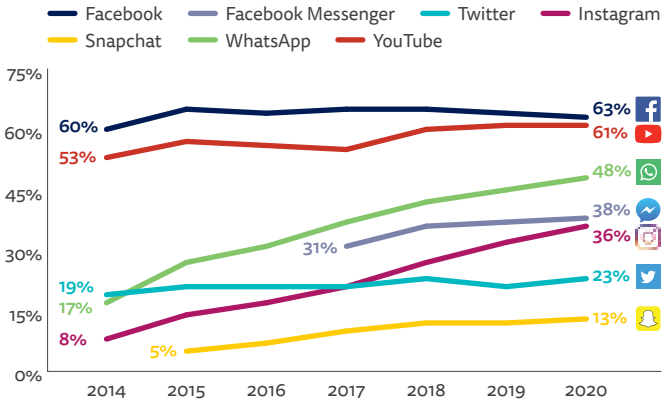
SOCIAL MEDIA PREFERENCES ALSO BECOMING MORE VISUAL

With video now a key component of social platforms, it is interesting to see how this is playing out in the networks people use most often.

Each year we track the importance of different social networks averaged across more than a dozen countries we have been tracking since 2014. Facebook and YouTube remain by far the most important networks, with around two-thirds using them each week for any purpose. Almost half now use WhatsApp (48%), part of a shift towards more private messaging which started in around 2016.

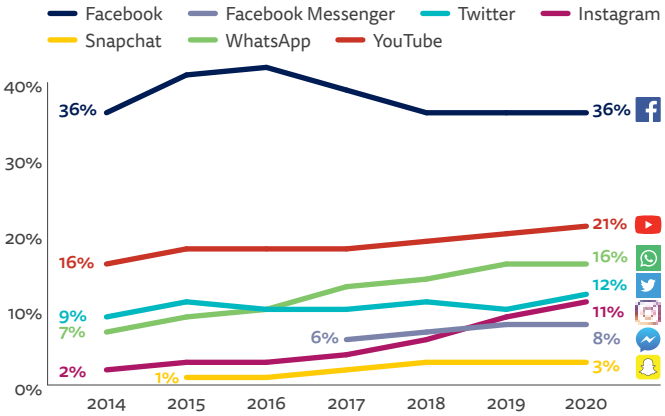
Another big change in the last few years has been the growth of Instagram which popularised visual formats like 'stories' and short videos via IGTV. Instagram now reaches more than a third (36%) weekly and two-thirds of under-25s (64%). As people spend more time with the network, the role of news has also increased significantly. Instagram reaches 11% across age groups, almost as many as use Twitter for news.

PROPORTION THAT USED EACH SOCIAL NETWORK FOR ANY PURPOSE IN THE LAST WEEK (2014–20) – AVERAGE OF 12 COUNTRIES



Q12a. Which, if any, of the following have you used in the last week for any purpose? *Base: Total 2014-19 sample across 12 countries ≈ 24000 (~19000 in 2014). Note: From 2015-20 the 12 countries included are UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia and Brazil. In 2014, we did not poll in Australia or Ireland.*

PROPORTION THAT USED EACH SOCIAL NETWORK FOR NEWS IN THE LAST WEEK (2014-20) – AVERAGE OF 12 COUNTRIES



Q12b. Which, if any, of the following have you used in the last week for news? *Base: Total 2014–19 sample across 12 countries ≈ 24000 (~19000 in 2014). Note: From 2015–20 the 12 countries included are UK, USA, Germany, France, Spain, Italy, Ireland, Denmark, Finland, Japan, Australia and Brazil. In 2014, we did not poll in Australia or Ireland.*

Both Instagram and WhatsApp were designed from the ground up for mobile usage, which gives them a cutting edge with younger people. In developing countries, Facebook has often made arrangements to bundle these applications with free data which has also helped them grow. After years of stagnation, Twitter has also seen significant growth in a small number of countries, also driven by younger demographics engaging with the platform more often. Twitter has also been pushing new video formats and monetisation of live video in the last few years.

Instagram for news

Brazil	**30%** (+4)
Chile	**28%** (+8)
Italy	**17%** (+4)
Spain	**17%** (+5)

Twitter for news

Spain	**20%** (+4)
USA	**17%** (+2)
Brazil	**17%** (+2)
Japan	**15%** (+5)

For more on the top social networks see section 3: Country and Market pages

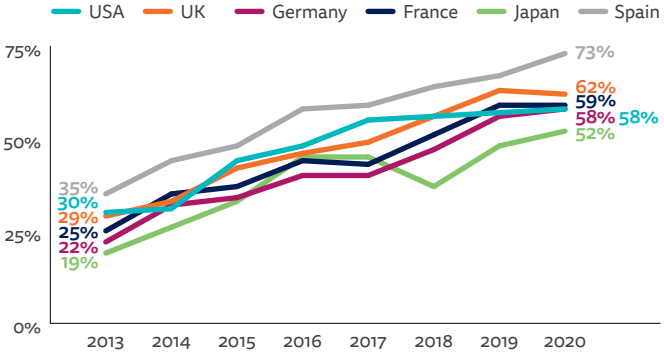
By allowing Instagram and WhatsApp to develop separately, Facebook as a company has been able to cater for many different demographics and try new formats, without losing its core loyalists. Across countries, Facebook Inc now reaches 85% each week on average, rising to 94% in Brazil and 96% in Kenya and South Africa.

DEPENDENCE ON SMARTPHONES CONTINUES TO GROW

Over two-thirds (69%) of people now use the smartphone for news weekly and, as we've seen, these devices are encouraging the growth of shorter video content via third-party platforms as well as audio content like podcasts. Those who use smartphones as a main device for news are significantly more likely to access news via social networks.

Usage is often highest in parts of the Global South such as Kenya (83%) and South Africa (82%) where fixed-line internet tends to be less prevalent. Access is lowest in Canada (55%), Japan (52%), and in much of Eastern Europe, though even here the smartphone has become – or is on its way to becoming – the main platform for accessing news.

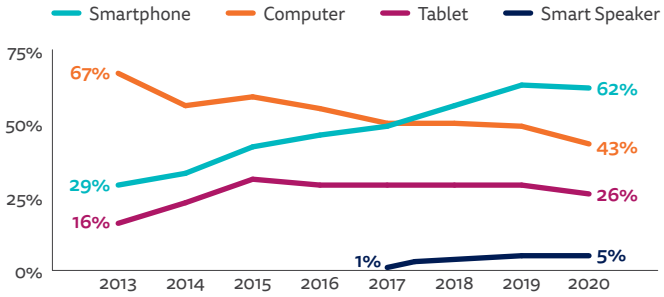
PROPORTION THAT USED A SMARTPHONE TO ACCESS NEWS IN THE LAST WEEK (2013-20) – SELECTED COUNTRIES



Q8b. Which, if any, of the following devices have you used to access news in the last week? *Base: Total sample in each country 2013-20 ≈ 2000.*

Across countries almost half (48%) use two or more devices to access news each week compared with 39% in 2014. Computers and laptops remain important for many but the convenience and versatility of the smartphone continues to win out. In the UK the smartphone overtook the computer in 2017 and is now used by around two-thirds of our sample. Tablets are flat in terms of usage for news (26%) with a small group of older and richer users continuing to value their larger screens. Smart speakers are now used for news by around 5% of online users.

PROPORTION THAT USED EACH DEVICE TO ACCESS NEWS IN THE LAST WEEK (2013–20) – UK

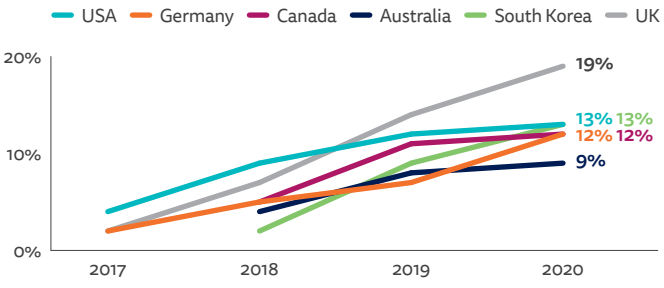


Q8b. Which, if any, of the following devices have you used to access news in the last week? *Total UK sample 2013–20 ≈ 2000.*

AI-driven smart speakers such as the Amazon Echo and Google Home continue to become more widely available, along with the intelligent assistants inside them. They are now in more than 20 countries including India, Mexico, and a wider range of European languages. Usage for any purpose is up five percentage points to 19% in the UK and a similar amount in Germany to 12%. In South Korea, where local firms make a range of popular speakers including the Naver Wave and Kakao Mini, usage is up four points to 13%.

Both Amazon and Google have been looking to improve the news experience after disappointing levels of take-up for on-demand briefings. Google has been rolling out a new atomised audio news service that aims to offer a more story-based approach and the BBC has added more controls to its news briefing allowing consumers to skip between stories. Despite these initiatives, our data suggest that only between a third and a quarter are using their devices to regularly access news.

PROPORTION THAT USE SMART SPEAKERS FOR ANY PURPOSE (2017-20) – SELECTED COUNTRIES



ALSO:
Spain 9%, France 4%, Sweden 4%, Norway 4%, Mexico 4%, Japan 4%

Q8a. Which, if any, of the following devices do you ever use (for any purpose)? *Base: Total sample in selected markets 2017–20 ≈ 2000.*

CONCLUSION

The COVID-19 lockdown has reminded us both of the value of media that bring us together, as well as the power of digital networks that connect us to those we know and love personally. For many of those stuck at home, television remains a window to the wider world, and some broadcasters have provided a platform for governments and health authorities to communicate health and other advice to mass audiences.

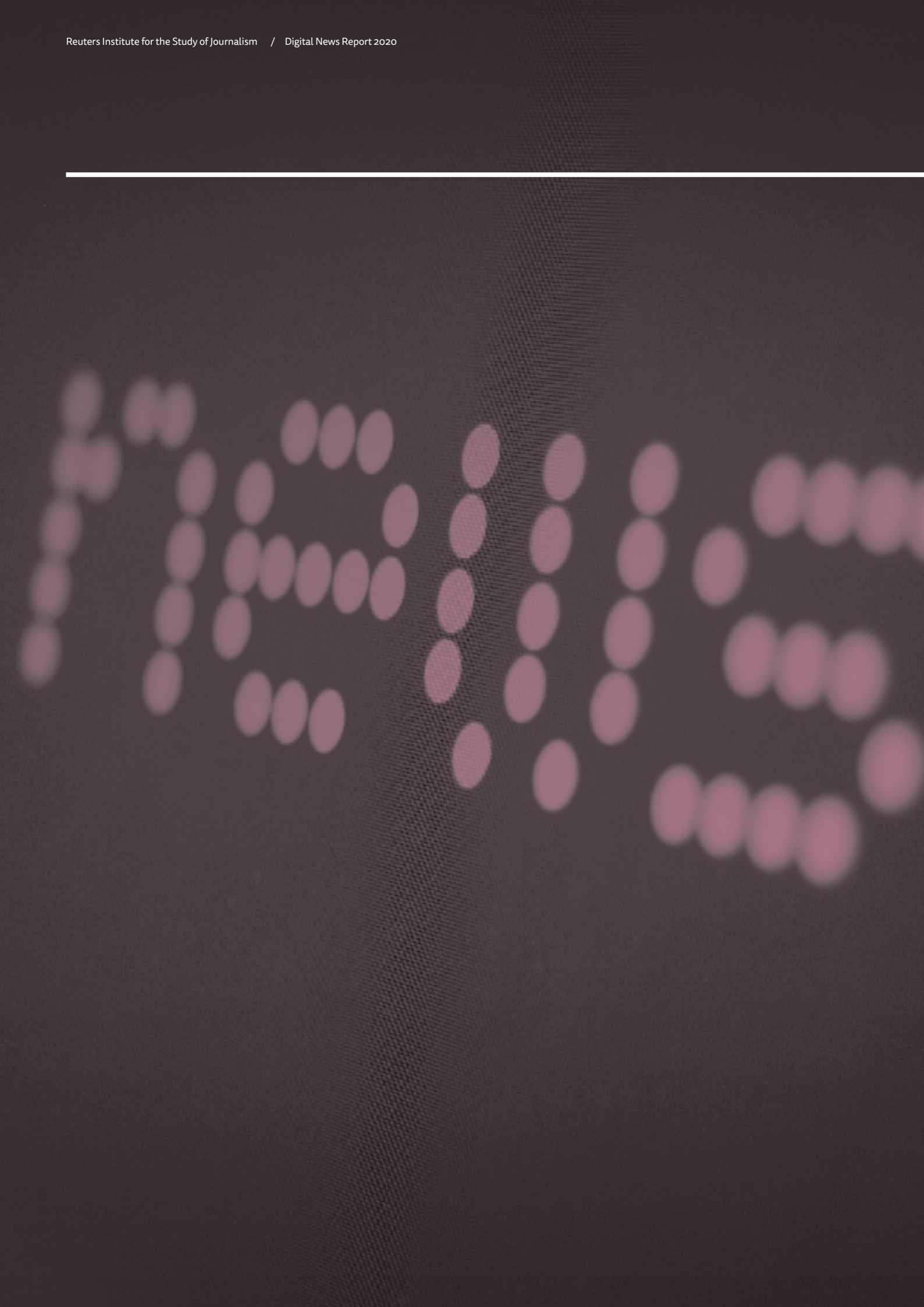
New digital behaviours have also emerged in this crisis that are likely to have long-term implications. Many have joined Facebook or WhatsApp groups for the first time and have engaged in local groups. Young people have consumed more news through services like Instagram, Snapchat, and TikTok. Video conferencing has emerged as a new platform for personal communication but has also changed the face of government press conferences. The media have embraced these new technologies in terms of remote working, but also in terms of the production and distribution of content.

The biggest impact of the virus is likely to be economic, with local and national media already cutting staff or publishing less frequently. The coronavirus crisis is driving a cyclical downturn in the economy hurting every publisher, especially those based on advertising, and likely to further accelerate existing structural changes to a more digital media environment in terms of audience behaviour, advertising spending, and reader revenues. Reader payment alternatives such as subscription, membership, and donations will move centre stage, but as our research shows, this is likely to benefit a relatively small number of highly trusted national titles as well as smaller niche and partisan media brands. The crisis in local media will become more acute with more calls for support from government and technology companies – with all the problems that this entails in terms of media independence.

As if this were not enough, dependence on aggregated and mobile content has made it harder for news brands to forge direct relationships with consumers. Our report shows that younger users, especially those now coming into adulthood, are even less connected with news brands and more dependent on social media. More effective distribution of formats like video, podcasts, emails, and notifications may help but most publishers continue to struggle to engage more deeply with the next generation and other hard-to-reach groups. More widely, concern about misinformation remains high, while trust in the news continues to fall in many countries.

Despite this, there are some signs of hope. The COVID-19 crisis has clearly demonstrated the value of reliable trusted news to the public but also to policymakers, technology companies, and others who could potentially act to support independent news media. The creativity of journalists has also come to the fore in finding flexible ways to produce the news under extremely difficult circumstances. Fact-checking has become even more central to newsroom operations, boosting digital literacy more widely and helping to counter the many conspiracy theories swirling on social media and elsewhere. Publishers have also found innovative ways to display and interrogate data, just one of many format innovations that have helped audiences understand the background and the implications for each individual.

The next 12 months will be critical in shaping the future of the news industry. Many news organisations go into this period clearer than ever about the value of their product even if the immediate outlook looks uncertain.



SECTION 2

Further Analysis and International Comparison

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2.1 How and Why People are Paying for Online News

Richard Fletcher
Senior Research Fellow, Reuters Institute for the Study of Journalism

It's not yet clear how the coronavirus pandemic will affect payment levels for online news. The initial surge in news use near the beginning of the crisis led to optimism that an increase in paid subscriptions would soon follow. But at the same time many people's finances have been badly affected, meaning they may have to make tough decisions about what they can and cannot afford. All this comes at a time when the stakes for many publishers have never been higher, as print revenues have shrunk during lockdowns, and there's more and more pressure to bring in money online.

Our data collection took place before many countries experienced a dramatic rise in reported coronavirus cases, so it cannot speak directly to these issues. But it does provide key information on the situation faced by publishers going into the crisis – much of which will still be relevant today, as past changes to attitudes and behaviour around paying for news have tended to be gradual rather than sudden.

METHOD

This year we took a more detailed look at online news subscriptions. To do this, we used a separate online survey in three countries – Norway, the USA, and the UK – that focused on paying for news. Most of data described here come from this survey. As always, survey data are not necessarily fully aligned with self-reported figures from the industry – each source has different strengths and weaknesses, with survey research best suited for getting at demographic and attitudinal patterns around certain behaviours.

In Norway, paying for online news is more widespread than in any other market in our survey, at around 45%. In the US, paying for online news is relatively common (20%), rising sharply after the election of Donald Trump. In the UK, paying for online news is yet to take off, with fewer than one in ten paying in the last year.

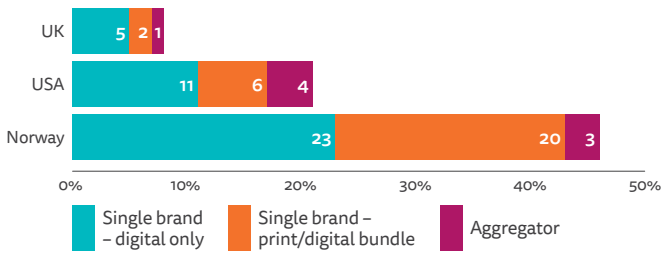
We used sample sizes of around 4,000 people in the US and the UK to ensure that the group that pays for online news was large enough to analyse separately (in Norway, as a higher proportion of people pay for online news, the paying group is large enough with a sample size of 2,000). The surveys used different questions to our main *Digital News Report* survey, but these questions tended to produce quite similar results. For example, figures for the proportion of people paying for online news were within the margin of error for both surveys.

SINGLE BRAND ACCESS STILL DOMINATES

Let's first consider people who have *access* to news that you would normally have to pay for. It makes sense to start here because some people have access to paywalled news through free trials, via their job, and so on. We will come on to those who actually pay with their own money later.

There are different forms of access, but the three most common are subscriptions to online news from a single brand, subscriptions to a print/digital bundle from a single brand, and a subscription to multiple brands aggregated in one place. Of these, digital-only subscriptions to a single brand are the most common form of access in all three countries. Print-digital bundles have clearly proved successful in Norway, with 20% of online news users currently using them to access paid online news. Paid news aggregators are relatively popular in the US, mainly thanks to Apple News+, but at the moment these are far less common than subscriptions to single news brands.

PROPORTION THAT CURRENTLY HAVE EACH TYPE OF ACCESS TO PAID ONLINE NEWS



PAY2. You say you currently have access to online news content that normally people have to pay to access. What do you have access to? *Base: Total sample: UK = 4253, USA = 4055, Norway = 2002.*

A WINNER-TAKES-MOST MARKET

As we saw in the Executive Summary, people mainly have access to one of a small group of prominent brands. In the US, over half of these people have access to either the *New York Times* or the *Washington Post*, and in the UK, it's *The Times* or the *Telegraph*. Norway is different because many people have access to paid news from a range of different local and regional newspapers, with national titles like *VG* and *Aftenposten* also popular. As we described in last year's report, most people only have access to paid news from one brand, creating winner-takes-most dynamics, but a significant minority in the US and Norway take out subscriptions to more than one title – often a local or specialist title in addition to a national one.

MOST ACCESS IS BEING PAID FOR

Up to this point we've referred to people who have 'access to online news that you would normally have to pay for'. However, most of this group have access because they are paying for subscriptions with their own money – 75% in Norway and the UK, and 84% in the US. For under-45s the figure is lower. But among those 45 and over, the vast majority of those who have access are paying with their own money.

PROPORTION THAT PAY FOR ACCESS WITH THEIR OWN MONEY BY AGE

	UK	USA	Norway
18-44	42%	73%	63%
45+	91%	92%	83%
ALL	**75%**	**84%**	**75%**

PAY4. You say you currently have access to news from <brand>. Did you pay for this yourself with your own money? *Base: 18–44/45+ who have access to a single news brand: UK = 76/157, USA = 243/264, Norway = 299/432.*

MOTIVATIONS FOR PAYING FOR NEWS

The reasons for subscribing to an online publication are complex and partly affected by supply-side factors such as the amount of high-quality free news available. In the United States and especially Norway, many publishers have introduced paywalls, which means more people will be asked to pay – perhaps heightening a sense of scarcity and creating a feeling that news could be worth paying for. In the UK, by contrast, only a relatively small number of publications try to charge for news.

Beyond this, we see subscribers weighing up personal benefits, such as distinctive content, convenience, and value, with perceived benefits for society – such as having a strong and independent media able to hold politicians to account. In this regard it is interesting to compare the different reasons subscribers give in the United States and United Kingdom for paying for online news.

Overall, the most important factor is the distinctiveness and quality of the content. In both countries, subscribers believe they are getting better information than from free sources. More than a third cite a close affinity with a particular journalist as a reason to subscribe. In the US we find more people prepared to pay to get ahead in their job (13% compared to just 3% in the UK) and this tallies with a bigger proportion subscribing to finance publications like the *Wall Street Journal*. The competitive nature of the US market, with multiple publications chasing subscriptions, is also making subscribers more aware of value, with one-third citing getting a 'good deal' as a reason to subscribe.

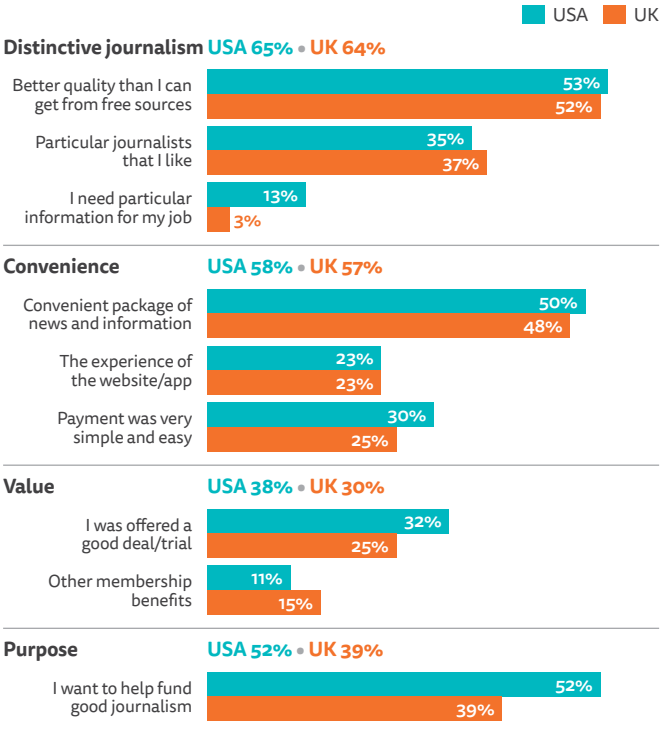
> ***I have an excellent discount with my Prime subscription and with the excellent reporting, there's no reason not to continue it.***
>
> *Female, 64, Washington Post subscriber*

Subscribers in the US are also more likely to say they want to help fund good journalism (52% compared with 39% in the UK). We know from our earlier surveys that much of the recent surge in subscriptions in the United States has come from those wanting to support liberal publications critical of Donald Trump – but there's also a more fundamental desire for quality journalism. These respondent comments were typical of many in our survey:

> ***It's never been a more important time to fund great, vetted journalism like the Times and the Post.***
>
> *Female, 59, New York Times subscriber*

> ***I like to sponsor local newspaper journalists. They are a dying breed.***
>
> *Female, 58, local newspaper subscriber*

REASONS FOR SUBSCRIBING TO AN ONLINE NEWS BRAND – USA AND UK



PAY5a. What are the main reasons for paying for online access? *Base: All that pay to access a single news brand: USA = 412, UK = 185.*

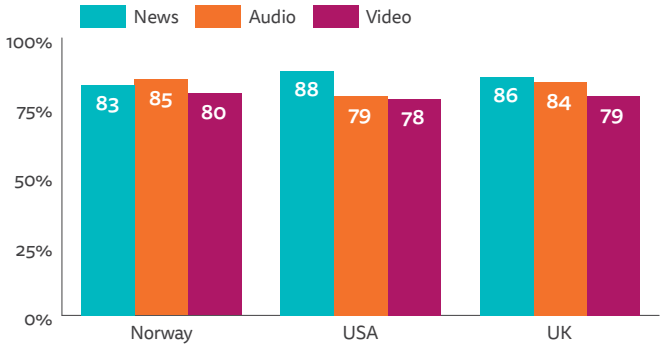
One interesting theme from our respondent comments was the sense of value that comes from additional elements, such as recipes and crosswords, that are often bundled in with the core news offer. *The Times* of London also runs regular competitions and discounts for artistic events that were widely mentioned in our open-ended questions. These additional elements seem to be particularly valuable for retention as they build habit and are less replicable elsewhere.

For Norwegians too the distinctiveness of content came out on top along with convenience and ease of use. '*Aftenposten* is a serious newspaper with great quality', said one respondent, but it was striking that 'supporting good journalism' is less of a motivation (21%) – perhaps because mainstream media outlets are seen as less polarised in Norway.

MOST PEOPLE THINK THEY WILL STILL BE PAYING NEXT YEAR

Around 80–90% of people paying with their own money think they are at least somewhat likely to still be paying for access this time next year. Additionally, around half of those who currently have free access say that they might start paying if their free access runs out. This is encouraging, and perhaps more encouraging still is that these figures imply retention rates that are comparable to those for subscriptions to video and audio streaming services like Netflix and Spotify.

PROPORTION THAT THINK THEY WILL STILL BE PAYING FOR THEIR ACCESS THIS TIME NEXT YEAR



PAY6/SERVICES1a/b. How likely or unlikely is it that you will still be paying for <brand/service> this time next year? *Base: All that pay to access a single news brand/video streaming/music streaming: USA = 412/2527/1372, UK = 185/2230/1184, Norway = 540/1104/906.*

It's worth keeping in mind that these data describe what people think they will do in the future, and were collected before a pandemic that has left many people financially worse off. It can also be seen as a useful reminder that people do not necessarily subscribe forever, and boasts about the number of 'new subscribers' may not be telling the whole story. There's substantial 'churn' in this area, as many people end their free trials before they have to pay, or simply cancel their subscriptions to spend their money on other things. Lapsed subscribers tended to be younger and often much more price conscious:

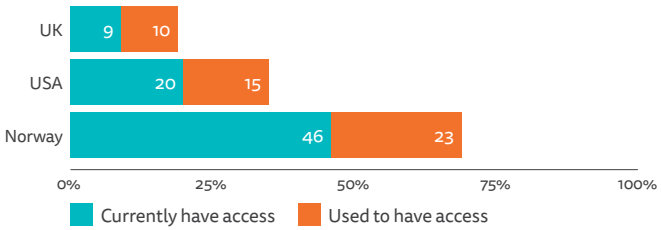
> ***The price was too high compared to the value the information I was given.***
> *Female, 37, Norway*

> ***It cost way too much and I can get round the paywall.***
> *Male, 36, USA*

> ***Too expensive, felt there was nothing I couldn't get for free on Apple News.***
> *Female, 19, UK*

In the UK, the number of people that *used to* have access to paid news (10%) is close to the number of people that *currently* have access (9%) – with the equivalent figures from the US and Norway higher still (albeit lower than the number of people with access). Increasing subscriber numbers is in part about tempting people back to news, as well as encouraging people to pay for the first time.

PROPORTION THAT CURRENTLY HAVE ACCCESS VS PROPORTION THAT USED TO HAVE ACCESS



PAY1. *Do you currently pay for access to online news (eg because you pay for a subscription / membership), or have access that normally people would have to pay for (eg because you get free access, or because someone else has paid for you)?* **PAY1a.** Have you ever had access to online news content that normally people have to pay to access? *Base: Total sample: UK = 4253, US = 4055, Norway = 2002.*

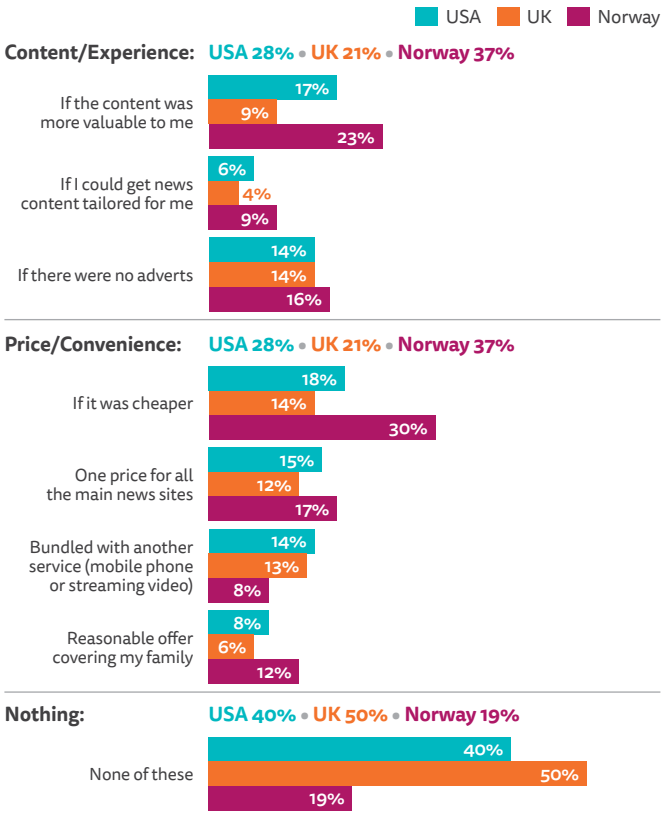
HOW CAN PUBLISHERS ATTRACT NEW SUBSCRIBERS?

As we've already seen, existing subscribers are relatively happy, but with income from digital advertising uncertain many publishers will be looking to increase the number of new subscribers. In comparing our three countries we see some interesting differences that could inform publisher strategies.

First, we observe a high proportion (40% in the US and 50% in the UK) who say that nothing could persuade them to pay. Many of these have low interest in news, or are sufficiently happy with the many free news sources available in these countries. But in Norway, where interest in news tends to be higher – and where free news is more restricted – only 19% say they couldn't be persuaded.

Price and convenience are some of the key factors that could make a difference. In Norway, a third (30%) say they might subscribe if it was cheaper and 17% if they could pay to access multiple sites from a single payment. Others were interested in exploring family logins, similar to those offered by Netflix or Spotify. Publishers have increasingly been offering differential pricing to pick up business from those unlikely to pay full price (eg overseas customers and students). Paying to avoid intrusive advertisements is another potential route for publishers, with around one in seven respondents in all three countries saying this this might tempt them to subscribe.

WHAT MIGHT PERSUADE NON-PAYERS TO SUBSCRIBE?



PAY1d. Which of the following, if any, would most encourage you to pay for online news access? *Base: All who do not have access to paid news: USA = 3269, UK = 3907, Norway = 1104.*

Going forward, news organisations will want to consider these signals about value of both price and user experience more closely. As we have argued before, people often weigh up one media subscription against another and the way news is currently sold does not always fit the requirements for easy, flexible, uncluttered access to multiple sources that people say they would like.

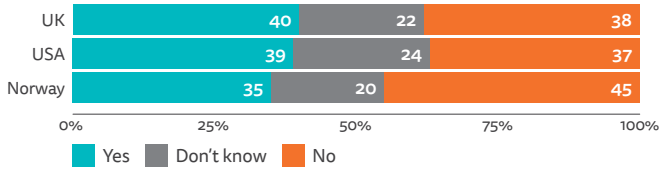
> ***[I cancelled my subscription because] it was expensive and only one view, and I prefer a summary from different sources to try and balance bias.***
>
> *Male, 69, UK*

Instead, the messaging is often around restrictions and barriers. Having said that, it is important to note that one-stop-shop paid aggregators have made limited headway for news – perhaps because they do not always include a comprehensive mix of the best content. The fear of missing out can be a powerful barrier.

PEOPLE WARY ABOUT REGISTERING WITH NEWS SITES

Some outlets now ask readers to register with them in order to be able to access a small number of articles for free. Many journalists would see this as a fair trade-off, but the public are more wary. In all three countries fewer than half think registering is a fair trade, but it's also clear that people are not strongly opposed either. Between a fifth and a quarter are unsure, perhaps because it's often unclear why news outlets want people to register in the first place, and what they will do with any user data they collect.

PROPORTION THAT THINK REGISTERING WITH A NEWS OUTLET IS A FAIR TRADE-OFF FOR BEING ABLE TO ACCESS THEIR CONTENT FOR FREE

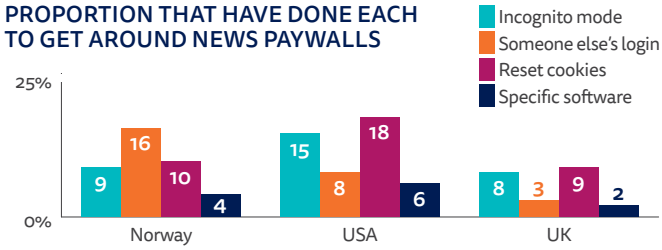


REGISTER2. Do you think that registering with a news outlet is a fair trade-off for being able to access their content for free? *Base: Total sample: UK = 4253, USA = 4055, Norway = 2002.*

ONLY A MINORITY TRYING TO SIDESTEP PAYWALLS

Between 13% and 22% in our three countries say they registered to access news content in the last year. Some are also using other techniques to get around paywalls – such as resetting cookies, changing their browser settings, or even downloading dedicated software. Just a third say they have ever tried to do something like this, as it requires a certain level of digital literacy, and many are probably unaware that is a possibility. Some may simply be content with what they can access for free.

PROPORTION THAT HAVE DONE EACH TO GET AROUND NEWS PAYWALLS



SUBS_BLOCKER. Have you ever done any of the following in the last year to access news content that lies behind a paywall or that you would normally have to pay to access? *Base: Total sample: UK = 4253, USA = 4055, Norway = 2002.*

People have different views about the rights and wrongs of attempting to sidestep paywalls. Few would argue that this is always justifiable, but some people do have reservations about important public-interest journalism only being available to those willing and able to pay for it. A paywalled exposé of the UK government's handling of the coronavirus outbreak by the *Sunday Times* led to a heated debate about the issue on Twitter, with some attempting to openly share the full article. Other outlets decided to make most of their coronavirus coverage free to access, as they have for other big events in the past.

Across all markets, 20% say they are 'very' or 'extremely' concerned about people missing out on paywalled news – about the same number who say they are 'not at all' concerned. People express similar levels of concern over the fact they themselves might be missing out. Journalists understandably have strong views on this issue, but it is not something that concerns the public.

The data here were collected before the coronavirus situation really became a crisis in the US, the UK, and Norway. But it seems very likely that the coronavirus pandemic has increased the pressure on many news outlets to make money from digital news. We've already seen how some outlets have changed their messaging around paywalls, or become stricter about ad-blockers. In the longer term, it is possible that the gravity of the situation will prompt people to reconsider their attitudes towards news, and crucially, how much they value it. Time will tell.

2.2 The Resurgence and Importance of Email Newsletters

Nic Newman
Senior Research Associate, Reuters Institute for the Study of Journalism

Email newsletters, once thought of as low-tech and unfashionable, are proving increasingly valuable to publishers looking to build strong direct relationships with audiences. Email can help build habit and loyalty, which is particularly important for new business models such as subscription and membership.

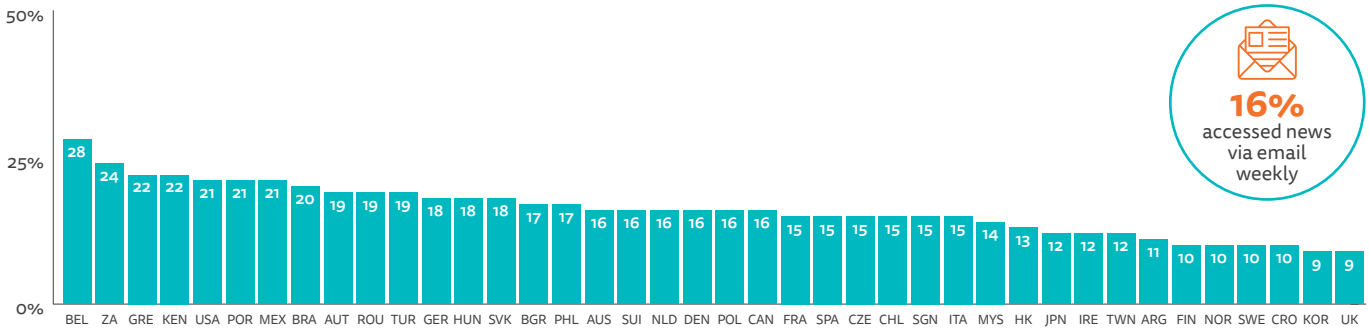
Previous research has highlighted a sharp increase in their production in recent years, both by 'legacy' print and newer digital media publishers (Jack 2016). The trend mirrors the continued importance of email in daily life, and its widespread use in marketing, despite the emergence of more sophisticated digital tools. In this chapter we explore in detail the role played by email news, how publishers are developing their editorial products, and why audiences value the format.

Looking first at consumption across countries, we find significant differences, with over a quarter (28%) using email news each week in Belgium, a fifth (21%) in the United States but around one in ten in Sweden (10%), South Korea (9%), and the UK (9%). The reasons for these differences are not entirely clear but may be related to the extent to which popular publishers have invested in and promoted the format compared with other channels. In countries like South Africa (24%) where bandwidth is expensive, text-based emails can also be an efficient way to distribute online news.

Only 16% across countries regularly use emails but these users tend to be much more interested in news and have more disposable household income. This makes them a very attractive set of consumers for publishers of all types.

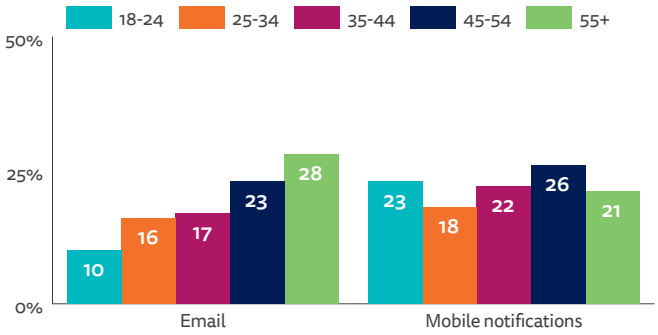
Email news users also tend to be older, with over-45s proportionally much more likely to receive them. By comparison, we find that mobile notifications are used equally across age groups. Email is popular both with news lovers – those who have high interest and high frequency of access – as well as with daily briefers, who tend to access news at a number of set times each day. Email is not a good way to engage casual users, who tend to favour channels where the news 'comes to them', such as television or social media.

PROPORTION THAT ACCESSED NEWS VIA EMAIL IN THE LAST WEEK – ALL MARKETS

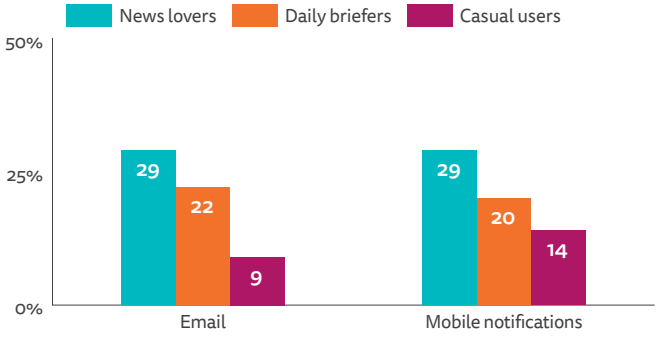


Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories? Please select all that apply. Showing email newsletter or email alert code. *Base: All markets 2020 = approx. 2000.*

PROPORTION THAT ACCESSED NEWS VIA EMAIL AND MOBILE NOTIFICATIONS IN THE LAST WEEK BY AGE – USA



PROPORTION THAT ACCESSED NEWS VIA EMAIL AND MOBILE NOTIFICATIONS IN THE LAST WEEK BY NEWS INTEREST/ FREQUENCY – USA



Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories? Please select all that apply. Got news via an email newsletter or mobile notification. *Base: USA 2055, 18–24 = 248, 25–34 = 369, 35–44 = 339, 45–54 = 238, 55+ = 860. News Lovers = 628, Daily briefers = 979, Casual users = 448. Note. See 2016 DNR (p.89) for how we define News lovers, Daily briefers, and Casual users.*

DIFFERENT TYPES OF EMAILS

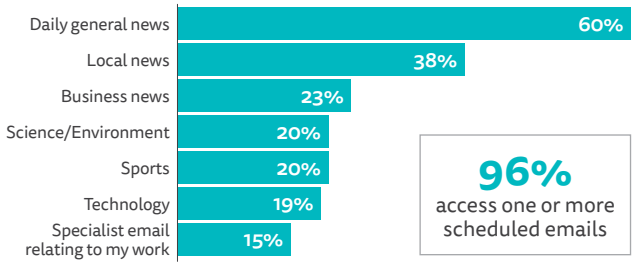
Across 21 countries, where we asked detailed questions around email news, we find that daily updates are the most popular type (60%) of email. These editorial mails which are typically sent early in the morning provide a useful way for readers to cope with a growing information overload.

> ***I use FT Breaking news – it is usually one of the first to break the story, it's concise so I can glance at it on the go, it covers important events that I care about and is a useful prompt to find out more if I want to.***
>
> *Male survey respondent, 34, UK*

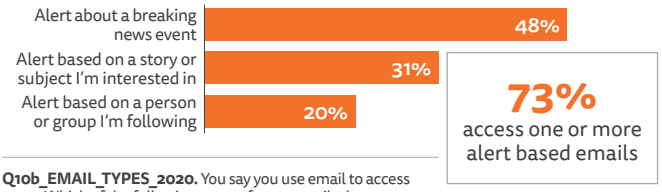
News organisations such as the *New York Times* and the *Washington Post* each offer almost 70 different scheduled emails showcasing the work of different parts of the newsroom including business, technology, culture, and sport. Many have also developed 'pop-up' newsletters to provide depth on a big ongoing story like coronavirus or the 2020 US presidential election. Beyond scheduled emails, three-quarters of our sample (73%) have also signed up for an email that is triggered by an event – such as a breaking news alert or one based on a specific subject or person that interests them. These emails may come from publishers or from news aggregators like Google News or Nuzzel.

PROPORTION OF NEWSLETTER USERS THAT GET DIFFERENT TYPES OF EMAIL – SELECTED COUNTRIES

Newsletters that arrive at a regular time each day or each week

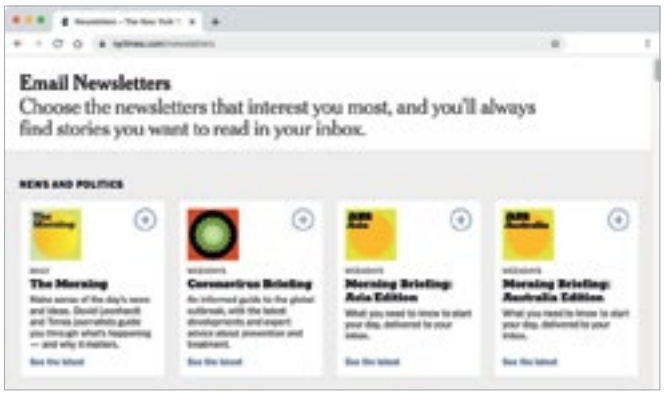


Alerts that arrive irregularly triggered by events



Q10b_EMAIL_TYPES_2020. You say you use email to access news. Which of the following types of news emails do you get sent? Please select all that apply. *Base: Those who get news via email in USA, UK, Germany, France, Italy, Spain, Ireland, Norway, Sweden, Finland, Denmark, Belgium, Netherlands, Switzerland, Austria, Japan, South Korea, Hong Kong, Australia, Canada, Argentina.*

REGULAR BRIEFING EMAILS OFFERED BY THE *NEW YORK TIMES*



Emails function halfway between print and digital. Like articles in a newspaper, they cannot be corrected, updated, or easily modified once sent. They tend to use a constrained layout, which may provide some photographs and graphics alongside text, but rarely more sophisticated or dynamic content. They are often appreciated for their simplicity, but also for how they can showcase journalism in a more personal way for specific groups of people:

> ***The [New York Times] Daily Update is a good mix of the most important news of the day at the top, then other articles of interest toward the bottom.***
>
> *Female, 34, USA*

> ***The Atlantic Daily helps pull me away from the daily news cycle and toward longer-cycle stories.***
>
> *Male, 39, USA*

Once just a series of automated links, the most successful emails are treated as an editorial product hosted by a senior journalist who brings an informal tone and personal touch which has often been lacking in digital media. The *New York Times* recently appointed David Leonhardt as anchor of the morning briefing newsletter, which it also revealed has more than 17m subscribers. The use of the term 'anchor', a term borrowed from network TV, shows the value now placed on human curation; on guiding audiences through the news of the day.[15]

In the UK Matt Chorley played a similar role for six years as host of the popular Red Box update for *The Times* newspaper – mixing politics, humour, and various types of user interaction.

> ***I enjoy Times Red Box because it condenses the last day's politics news in a light-hearted way.***
>
> *Female, 35, UK*

Chorley has used the email as a springboard to build a wider personal brand with a weekly podcast, and a nationwide stand-up comedy tour. Now he's giving up the newsletter to take up a new role as a host on the recently launched Times Radio.

Newsletters tend to be free to all, allowing content to be sampled with the hope that engaged readers can then be converted into subscribers. But they can be equally valuable in providing regular prompts for existing customers to use the product more regularly.

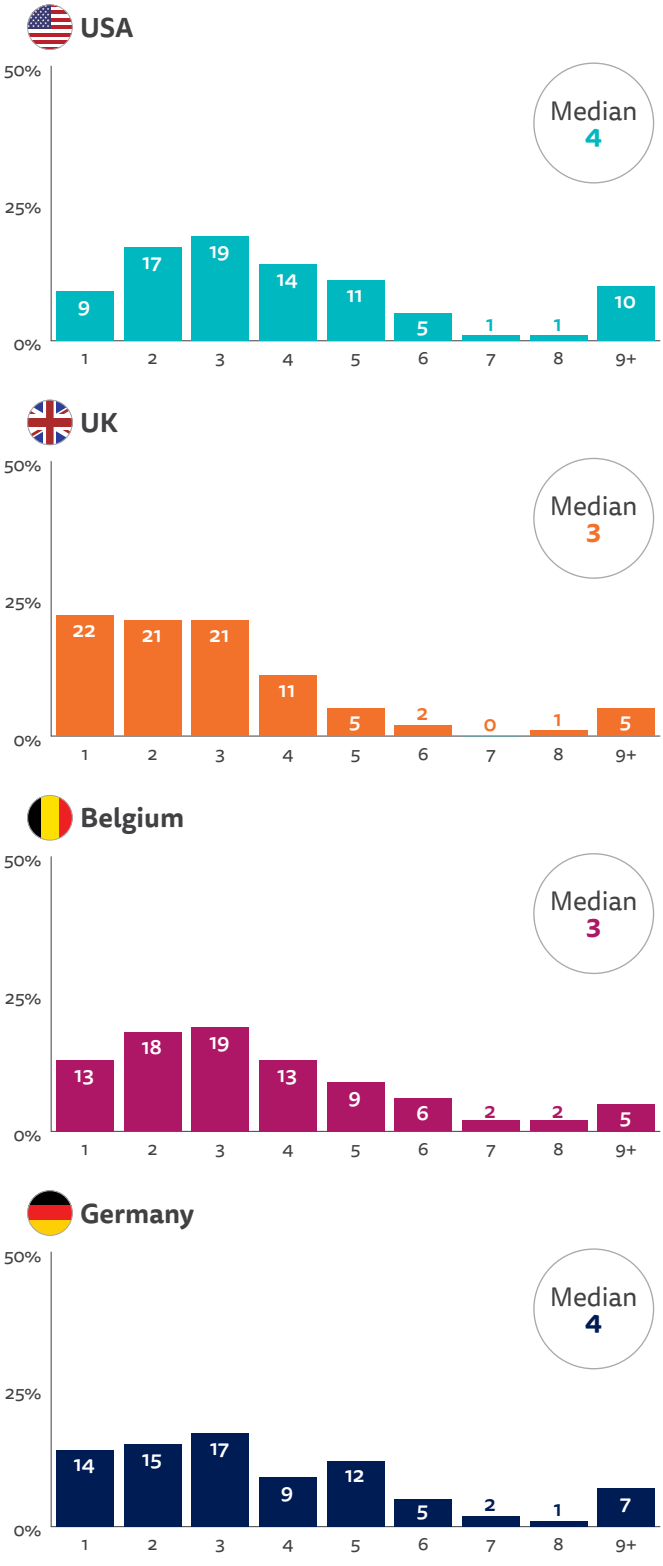
> ***An email saves me going to the web site to find nothing interests me and acts as a reminder to see what's going on.***
>
> *Male 44, UK subscriber to the update email of the Sheffield Star UK*

HOW MANY EMAILS IS TOO MANY?

People in the US get, on average, more emails from different news providers (4) than those in the UK (3). Our analysis shows that American email users are also twice as likely to receive politically focused emails (47%) compared with the average across countries (26%). Emails are particularly important for partisan news providers with the Daily Signal, the Blaze, the Daily Caller on the right and the Daily Kos on the left mentioned frequently by our survey respondents.

Given the relatively high number of emails received, it is striking that on average across our 21 countries almost half (44%) say they read most of their emails each day. A further 37% say they read some of their emails, with only 18% saying they read none or just a few. Publisher data show that the most popular news emails can get open rates of up to 80%, though industry averages tend to be closer to 30%.[16] The *New York Times* reports an open rate of around 60% for its morning update newsletter.[17]

AVERAGE NUMBER OF EMAILS USERS RECEIVE FROM DIFFERENT NEWS ORGANISATIONS – SELECTED COUNTRIES



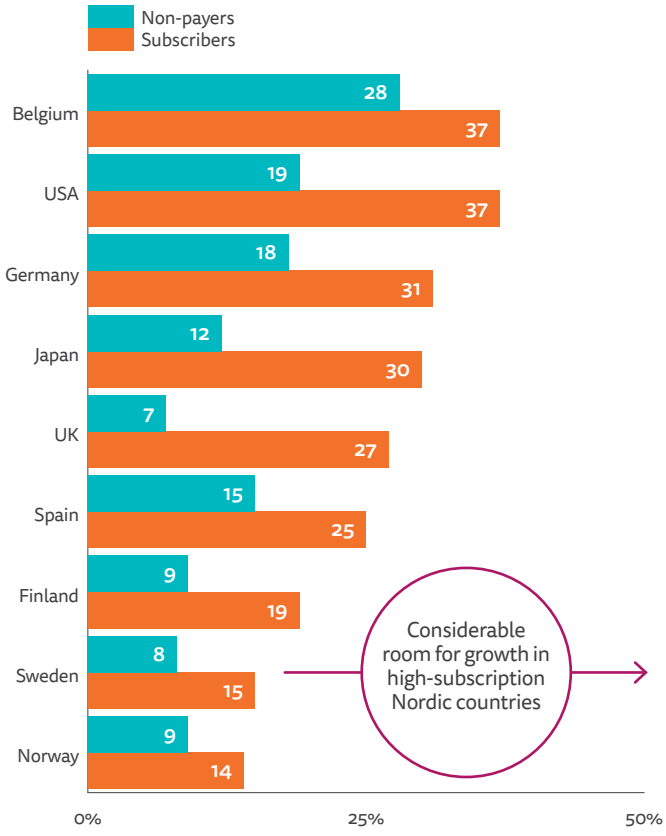
Q10b_EMAIL_2020 You say you get news via an email newsletter or alert. Roughly how many different organisations send you news related emails each week? *Base: Those who get news via an email newsletter or alert: USA = 420; UK = 188, Belgium = 532, Germany = 374.*

[15] https://www.nytco.com/press/new-role-for-david-leonhardt/
[16] https://mailchimp.com/resources/email-marketing-benchmarks/
[17] https://www.nytco.com/press/the-new-york-times-sees-record-newsletter-subscriptions-and-open-rates/

THE ROLE OF EMAIL IN BUILDING LOYALTY

For subscription businesses email is often a critical weapon in reducing churn – the rate at which people stop paying for the service. Publishers like the *Wall Street Journal* and the *Financial Times* try to get new subscribers to take up email newsletters in the first few weeks because the data show that this increases engagement, which in turn reduces churn. According to our data, in Belgium and the United States publishers have managed to get around four in ten (37%) digital or joint digital/print subscribers to use email newsletters. But levels are much lower in many Nordic countries – despite equally high levels of paying for news. In Norway only 14% of subscribers access email weekly, with similar numbers in Sweden (15%) and Finland (19%). Despite their extreme sophistication in using data it seems there is much to learn from American and Belgian publishers on how they are driving more regular engagement through the number, quality, and focus of their emails.

PROPORTION OF PAID SUBSCRIBERS AND NON-PAYERS THAT ACCESSED NEWS VIA EMAIL IN THE LAST WEEK – SELECTED COUNTRIES



Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories? Showing email code. *Base: Those who have ongoing digital or digital/print subscription. Belgium=178, USA = 321, Germany = 162, Japan = 126, UK=117, Spain = 179, Finland = 308, Sweden = 433, Norway = 672. Base: Those who have not paid for news in the last year; Belgium = 1626, USA = 1526, Germany = 1709, Japan = 1626 UK = 1806, Spain = 1680, Finland = 1574, Sweden = 1438, Norway = 1082.*

Email news is no silver bullet solution. It is still a minority activity that appeals mostly to older readers and the format can be restrictive. But despite its relative unsophistication, it does remain one of the most important tools available to publishers for building habit and attracting the type of customers that can help with monetisation (subscription or advertising).

With publishers stepping up email production there is a huge amount of choice for consumers, so it is more important than ever to create distinctive content that fills specific audience needs. Our respondent comments show that many consumers appreciate morning and evening briefings because they are easy to skim and save time. Others like the tone of voice and humour that can be provided by a personality guiding people though the news every day – like a television anchor. Others still find email a more efficient way to keeping in touch with a specialist subject area than, for example, browsing through a website.

While specific email formats continue to evolve over time, the characteristics of the most successful – simplicity, finish-ability, curation, and serendipity – are finding parallels in other forms of journalistic output and will be increasingly valuable over time in a world of information abundance and overload.

2.3 How do People Want the Media to Cover Politics?

Richard Fletcher
Senior Research Fellow, Reuters Institute for the Study of Journalism

As the structure of the media environment has changed in recent years, so has the relationship between politics and journalism. The growth of platforms like social media and video sites means that politicians can now communicate with the public more directly. This allows politicians to largely sidestep media scrutiny – the price they used to have to pay to get their message across – arguably shifting the balance of power, giving politicians the confidence to bend the rules that used to govern their relationship with the media. (Think, for example, of cases where political parties have used social media to spread re-edited versions of video interviews that make their candidate look better or their opponents look worse.)

Of course, much remains the same, but there's also a sense that the news media are struggling to adapt to this new world, and may not always be as capable of holding politicians to account at a time when they have less control over what eventually reaches the public.

Journalists, politicians, academics, and other observers have offered a range of opinions on what the media should do in response, but the views of news audiences are rarely solicited – something that seems odd given that many news organisations have become increasingly audience-focused in recent years. Few would argue that audiences should completely dictate journalistic practice, or the policy of the technology platforms, but what they think still matters – because journalism exists within the context of the audience.

In this section we present data on what the audience thinks about three key issues: (i) whether the media should report false statements from politicians, (ii) whether politicians should be able to advertise on platforms, and (iii) whether platforms should fact-check political adverts.

Somewhat unusually, we tend to find clear answers to these questions – both across countries and across different demographic groups. Most people think journalists should report false statements from politicians even if it gives them unwarranted attention, and most people think that platforms should block political adverts that contain inaccuracies even if it ultimately means the platforms become the arbiters of truth. However, whether or not people think political parties should be allowed to advertise on platforms in the first place seems to depend on the current rules governing political advertising on television.

Most of the time, and in most countries, there is a consensus on these issues that stretches across the left-right political spectrum. But we see different views when we look at people with different levels of interest in politics – with the most interested tending to prefer more open political communication environments that reflect the status quo.

A NOTE ON THE QUESTIONS

The issues covered here are complicated, so designing questions to tap people's views on them is challenging. To simplify them for our respondents, we framed them as either/or issues by asking people to select one of two options (plus a don't know), and worded them in a way that hinted at the underlying concerns. Of course, there is an infinite number of alternative wordings, some of which may produce different results.

A common reaction from journalists and academics to issues such as whether the news media should report false statements is to say that 'it's too complicated' or 'it depends', and to conclude that it's impossible to generalise across different situations. That may be partly true, but it is important to understand that – rightly or wrongly – most people are able to do this. Around 80–85% of people express a clear view to the questions included here, with the rest saying they don't know. Don't know responses are less common among those with higher education and higher political interest, so it seems unlikely that people 'don't know' because it's too complicated – rather, most are likely from people who don't have strong views one way or the other.

PEOPLE WANT THE MEDIA TO REPORT POTENTIALLY DUBIOUS STATEMENTS FROM POLITICIANS

A key concern for many media organisations across the world is how to cover politicians who have a reputation for consistently making false statements. Some worry that repeating false statements – even if they are fact-checked and clearly labelled as such – still gives politicians the attention they crave. In March 2020, some US media pundits similarly questioned whether it was right to live broadcast President Trump's COVID-19 press conferences given that they might contain misinformation about the virus.[18] On the other hand, some might argue that news organisations have a duty to report what politicians have said, regardless of whether it's true or false.

And it's this, it seems, that comes closer to what most people would prefer. In almost every market, people say that when the media has to deal with a statement from a politician that could be false, they would prefer them to 'report the statement prominently because it is important for the public to know what the politician said' rather than 'not emphasise the statement because it would give the politician unwarranted attention'.[19]

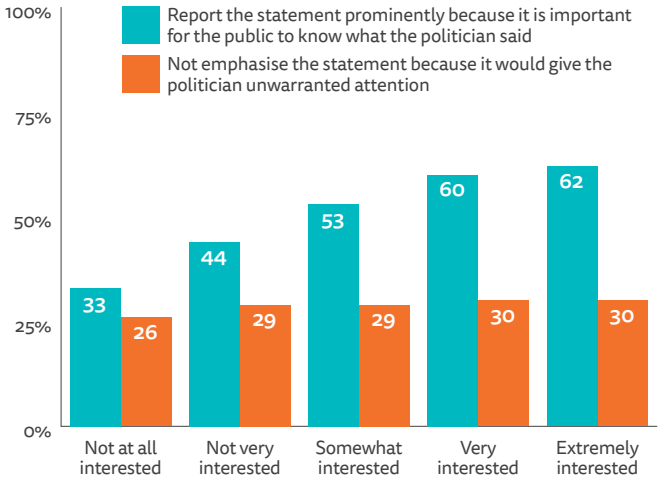
In Sweden, where the difference is very large, 62% of people would prefer the statement to be reported prominently, compared to just 10% who think the statement should be downplayed. We see the same pattern in the US and the UK, and indeed, in almost all other markets. Only in Chile is there some evidence that the opposite might be true, with 48% saying statements should be downplayed, and 40% saying they should be reported.

We might expect this preference for reporting to be even stronger if statements are reported as *false*, but it is important to understand that there are many situations where this is simply not possible. What's clear, though, is that most people are uncomfortable with the idea of the news media hiding information from the public – even if they think it might be for the greater good.

As well as being consistent across almost all countries, this general view appears to be consistent across a range of different socio-demographic groups like age, gender, and political leaning. Even in the US, where some might assume partisan differences due to different political styles, a majority of those on the left (58%) and right (53%) would prefer potentially false statements to be reported prominently – though perhaps for different reasons.

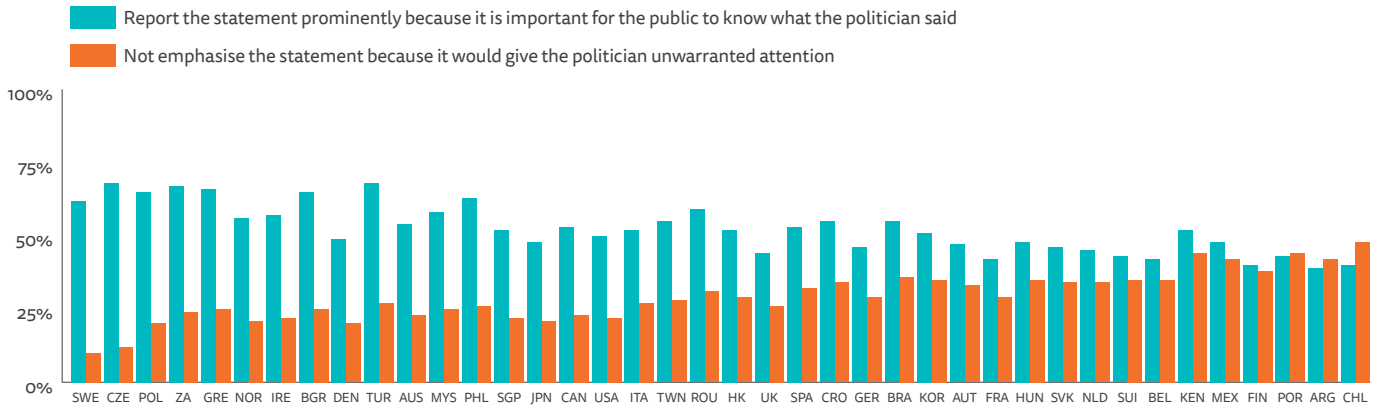
However, if we look at differences by interest in politics across all markets, we see that, as interest goes up, people are more likely to take a view (as opposed to saying they don't know), and that view is more likely to be that the news media should report what politicians have said. Those with the highest levels of political interest are around twice as likely to prefer potentially false statements from politicians to be reported.

WHAT SHOULD THE MEDIA DO WITH STATEMENTS FROM POLITICIANS THAT COULD BE FALSE BY POLITICAL INTEREST? – ALL MARKETS



J1_2020. Thinking about how the news media covers politics, if a politician makes a statement that could be false, which comes closer to your view about what the news media should do?
Base: Not at all/Not very/Somewhat/Very/Extremely interested in politics: All markets: 6212/15809/28790/19790/9599.

WHAT SHOULD THE MEDIA DO WITH STATEMENTS FROM POLITICIANS THAT COULD BE FALSE? – ALL MARKETS



J1_2020. Thinking about how the news media covers politics, if a politician makes a statement that could be false, which comes closer to your view about what the news media should do?
Base: Total sample in each market ≈ 2000, Taiwan = 1027. Note. See website for precise figures.

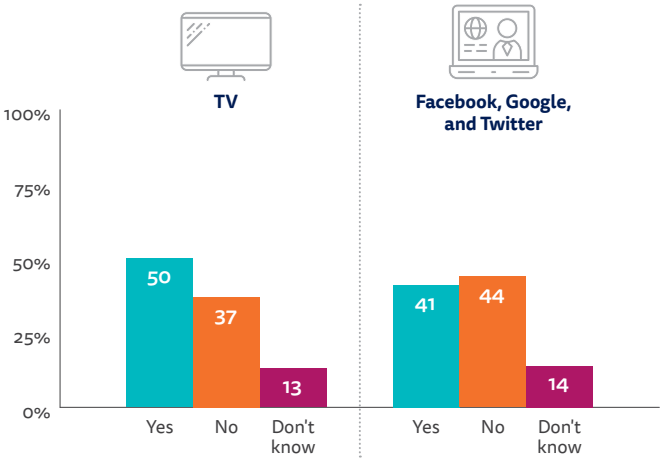
[18] https://www.independent.co.uk/news/world/americas/us-politics/coronavirus-trump-white-house-briefing-rachel-maddow-margaret-sullivan-jennifer-senior-a9416741.html
[19] Wording adapted from a 2016 Pew survey: http://assets.pewresearch.org/wp-content/uploads/sites/13/2016/10/17130939/Role-of-media-in-elections-2016-TOPLINE.pdf

PEOPLE LESS COMFORTABLE WITH POLITICIANS ADVERTISING ON SOCIAL MEDIA

Recent debates about the role of the media in society have also focused on political advertising. Some countries have long had strict rules dictating how politicians and political parties advertise on television, but in many cases these rules have not been extended to social media. Furthermore, the potential for micro-targeting on some social networks, together with a lack of transparency over what each person sees on their feed, has led some commentators to question whether any form of political advertising should be permitted. In October 2019 Twitter announced that it would ban all forms political advertising, shortly after Mark Zuckerberg ruled out the possibility of a similar ban on Facebook, and in November, Google said it would no longer permit campaigns to micro-target voters with certain ads based on political attributes.

What do people think about this issue? Across countries, around half of all people surveyed (50%) think that politicians should be able to advertise on TV, but people are more sceptical about political advertising on platforms – which has 41% approval.

SHOULD POLITICAL PARTIES BE ALLOWED TO ADVERTISE ON THE FOLLOWING? – ALL MARKETS



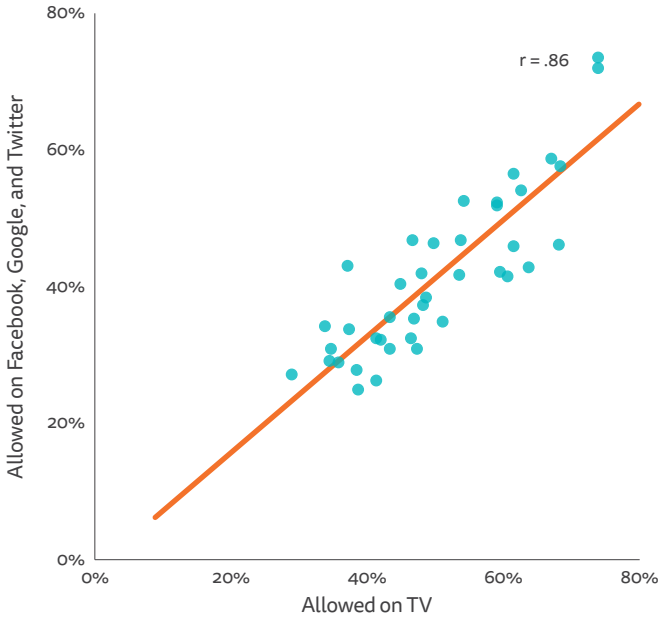
J2_2020_1/2. Should politicians and political parties be able to advertise on television/ Facebook, Google, and Twitter? *Base: Total sample = 80155.*

But in a sense, this misses the point, because the picture varies a lot by country, and in turn, the existing rules within that country. Support for political advertising on television tends to be lower in European countries like Germany, Denmark, and Norway, where regulation is already quite tight. Support in the US – where there are few restrictions – is much higher at 68%, and higher still among those on the right (83%).

This is important because if people approve of political advertising on TV, they normally approve of advertising on platforms too. Across all markets, 69% of those that approve of political advertising on television also approve of it on platforms. Similarly, 81% of those that think advertising on television should be banned also think that it should not be permitted on search and social either. The thinking seems to be, 'if it's OK for them to advertise on television, why can't they advertise on social media too?'

This pattern also applies at the country level. If we plot national support for political advertising on television against support for political advertising on platforms we can see that the two go hand in hand.

COUNTRY-LEVEL SUPPORT FOR POLITICAL ADVERTISING ON TELEVISION PLOTTED AGAINST COUNTRY-LEVEL SUPPORT FOR POLITICAL ADVERTISING ON PLATFORMS – ALL MARKETS



J2_2020_1/2. Should politicians and political parties be able to advertise on television/ Facebook, Google, and Twitter? *Base: Total sample in each market ≈ 2000, Taiwan = 1027.*

PEOPLE WANT TECHNOLOGY COMPANIES TO BLOCK DUBIOUS POLITICAL ADVERTS

Of course, this view may be based on the assumption that political advertising on platforms will be held to the same standard and will work in broadly the same way. But we know that advertising on platforms differs quite strikingly in terms of the transparency of the underlying technology, the ability to target certain groups, and the opportunity to disseminate thousands of adverts with different messages. A study by First Draft during the recent 2019 UK General Election found that a significant number of adverts from all political parties contained statements that had been flagged as (at least) partially incorrect by independent fact-checkers.[20] This prompts important questions about the veracity of claims made in political advertising on platforms – and if and how it should be policed.

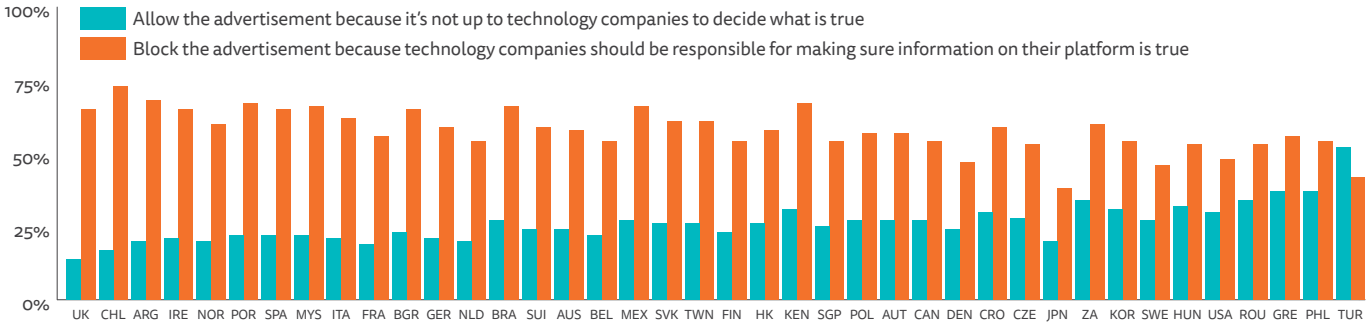
Assuming that most platforms continue to allow political advertising in some form – thus allowing them to sidestep the crucial issue of what counts as 'political' – then some might argue that they are responsible for ensuring that the information they contain is true. Others might have serious concerns about allowing technology companies to be the ones who decide between true and false.

[20] https://firstdraftnews.org/latest/thousands-of-misleading-conservative-ads-side-step-scrutiny-thanks-to-facebook-policy/

Despite this, 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 word *could* is important here, because it suggests that people would prefer platforms to err on the side of caution, and that people overwhelmingly want platforms to block adverts that are unquestionably false.

Either way, there is little evidence of widespread concern over letting technology companies make decisions about what to block and what to allow. In particular in polarised and political disputes, platform companies may not want to be 'arbiters of truth' – and politicians may not want them to be either, at least when on the receiving end of content moderation – but much of the public seems to have no principled opposition to the companies taking on this role, at least for political advertising.

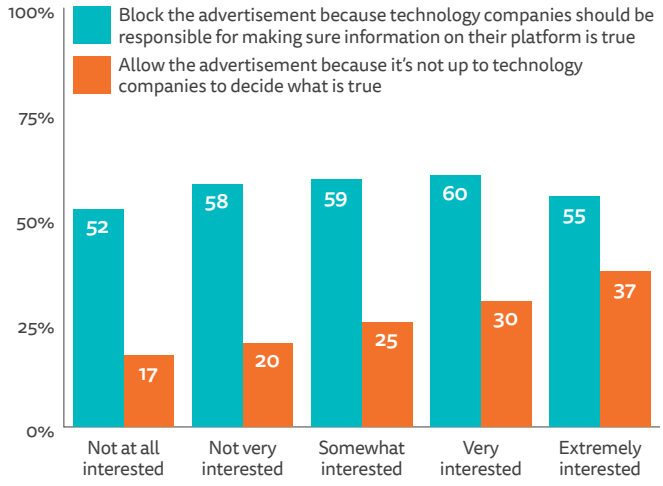
WHAT SHOULD PLATFORMS DO WITH POLITICAL ADVERTS CONTAINING INFORMATION THAT COULD BE FALSE? – ALL MARKETS



J3_2020. Thinking about the responsibility of technology companies like Facebook, Google, or Twitter, if a politician or political party takes out an advertisement that could be inaccurate, which comes closer to your view about what technology companies should do? *Base: Total sample in each market ≈ 2000, Taiwan = 1027. Note. See website for precise figures.*

However, support for platforms stepping back from making decisions about veracity starts to grow if we focus on those with higher levels of interest in politics. Those most interested in politics are twice as likely to favour platforms allowing political adverts that may contain inaccuracies. To connect this with an earlier finding, it seems that those most interested in politics have a stronger preference for more open environments for political communication, with fewer actors responsible for censoring information – even if it means that more falsehoods circulate.

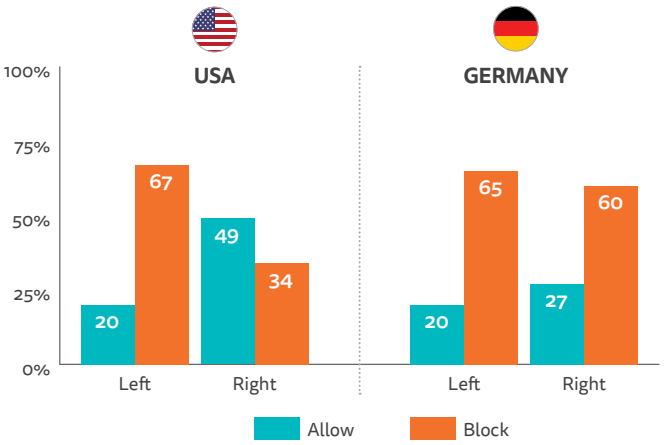
WHAT SHOULD PLATFORMS DO WITH POLITICAL ADVERTS CONTAINING INFORMATION THAT COULD BE FALSE BY INTEREST IN POLITICS? – ALL MARKETS



J3_2020. Thinking about the responsibility of technology companies like Facebook, Google, or Twitter, if a politician or political party takes out an advertisement that could be inaccurate, which comes closer to your view about what technology companies should do? *Base: Not at all/Not very/Somewhat/Very/Extremely interested in politics: All markets: 6212/15809/28790/19790/9599.*

However, unlike the previous question about whether the media should report potentially false statements, left-right partisanship does matter in some countries. In Germany, both left and right would prefer to see platforms block political adverts that could contain inaccuracies, but in the US, those on the right think they should be allowed.

WHAT SHOULD PLATFORMS DO WITH POLITICAL ADVERTS CONTAINING INFORMATION THAT COULD BE FALSE BY POLITICAL LEANING? – SELECTED COUNTRIES



J3_2020. Thinking about the responsibility of technology companies like Facebook, Google, or Twitter, if a politician or political party takes out an advertisement that could be inaccurate, which comes closer to your view about what technology companies should do? *Base: Left/Right: USA = 506/474, Germany = 314/103.*

The data cannot tell us *why* those with high political interest prefer the news media to adopt a more laissez-faire approach to politics. It may be because they feel better equipped to navigate a media environment like this and find it difficult to imagine the problems others might face, or perhaps because they feel better served by the status quo – where in most cases the media report false statements by politicians, and platforms do not fact-check political adverts.

Of course, media companies should not necessarily change their practices just to meet the preferences of the audience. These are difficult questions, and no response can satisfy everyone. We have focused on political claims here, but potentially inaccurate claims about coronavirus, for example, can have a direct human cost – and surely require a different approach.

But if the way politicians and political parties use the media is fundamentally changing, then the media may have to make some changes too. No amount of data on audience preferences can tell us exactly how, but it can highlight some of the problems with simplistic solutions. For example, it is sometimes said that the way to deal with politicians who lie is simply to stop reporting what they say. But no one likes to feel that things are being kept from them. So, are those who say this really describing a media environment they themselves would like to inhabit – or just one they would prefer other people to live in?

2.4 Global Turmoil in the Neighbourhood: Problems Mount for Regional and Local News

Anne Schulz
Research Fellow, Reuters Institute for the Study of Journalism

The COVID-19 pandemic is turning a tough business into a full-blown crisis. Local and regional news has been under pressure for years as audiences shifted their attention to digital and classified and display advertising moved to online specialists. The pandemic is now seriously impacting remaining revenues leading many companies to cut staff, stop printing, or be forced into liquidation. Non-commercial local media have also been struggling to deliver on-the-ground reporting in a world of lockdowns and social distancing. Some public service broadcasters have temporarily cut back local output[21] at a time when local TV and radio have already lost reach and influence with the shift to digital.

But this crisis has also shown how much local news still matters as people try to learn about the spread of the virus in their area as well as hear the advice of local government, which has sometimes taken a different approach to national guidelines. This pandemic has reinforced the democratic importance of local reporting in providing timely and relevant local information as well as holding local politicians to account.

In this section we offer an international perspective on how local and regional news are valued across different countries and what sources of local news people prefer. We also look at the extent to which people would miss their favourite local news outlet if it was no longer available.

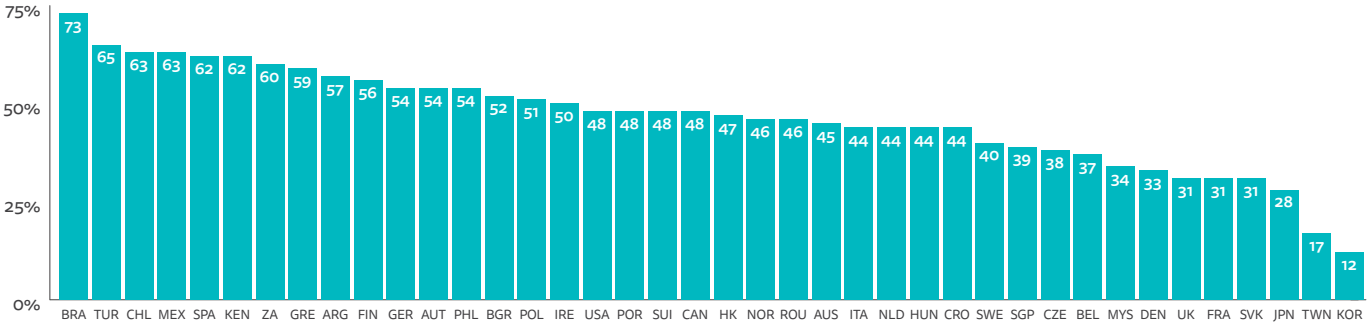
Measuring local and regional news consumption across 40 countries is no easy task. The markets in our sample differ hugely in their size – from large city states like Singapore and Hong Kong to giant loosely connected federations like Brazil and the United States. Political systems vary greatly in their degree of regional autonomy, which may influence the relative importance of local, regional, and national news. While recognising these differences, our aim was to provide a common way of understanding how people in different countries think about news that is *closer to their home*. In this regard, we gave our survey respondents a relatively wide definition of local news that could include 'news from the city or town, municipality or region that they live in'.

DOES THE PUBLIC VALUE LOCAL NEWS?

Even before the COVID-19 crisis, almost half our survey respondents (47%) across countries said that they were very or extremely interested in local news. This compares with 37% who said they were interested in politics. If we break this down via market, we observe striking differences, with interest highest in countries with a federal system or a high degree of regional autonomy. Almost three-quarters of Brazilians (73%) say they are interested in local news, two-thirds of Spaniards (62%), and around half (54%) in Germany and the United States (48%). By contrast, people who live in countries with more centralised systems show comparatively little interest in local news, though it is important to note that there may be many other factors explaining the differences found in our data. Only 31% say they are interested in the UK and France, and the number drops down to 12% in South Korea.

[21] https://www.cbc.ca/radio/thecurrent/the-current-for-march-24-2020-1.5507880/we-totally-understand-the-frustration-cbc-president-defends-local-tv-news-suspension-amid-pandemic-1.5508146

PROPORTION VERY OR EXTREMELY INTERESTED IN LOCAL NEWS – ALL MARKETS



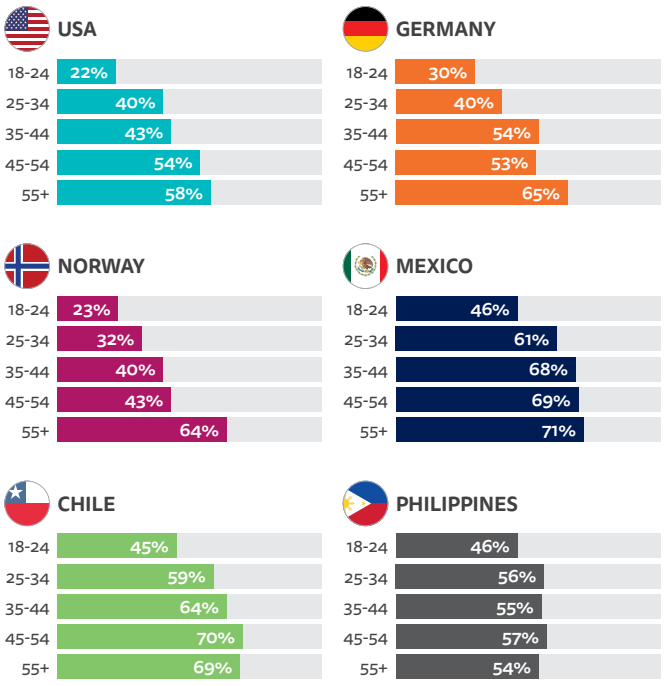
QL1_2020. How interested, if at all, would you say you are in local news? *Base: Total sample in each country.*

THE DEMOGRAPHIC CHALLENGE

While overall interest remains high, local news organisations have struggled to adapt to new digital platforms and in many cases local newspapers have continued to prioritise the economic importance of their print products – at least before the crisis (Jenkins and Nielsen 2020). This is partly because its core audience tends to be more traditional but also because local media have invested more slowly in product innovations such as mobile sites and video formats. Even in Norway, a country that is often held up as a model for sustainable local news, businesses remain highly dependent on a large number of over-55s who are three times as likely to be interested in local news as 18–24s. It's a similar story in Germany and the US where older generations show much more interest in local news. Only in a few countries, such as the Philippines, Mexico and Chile, do we see relatively high interest with younger groups.

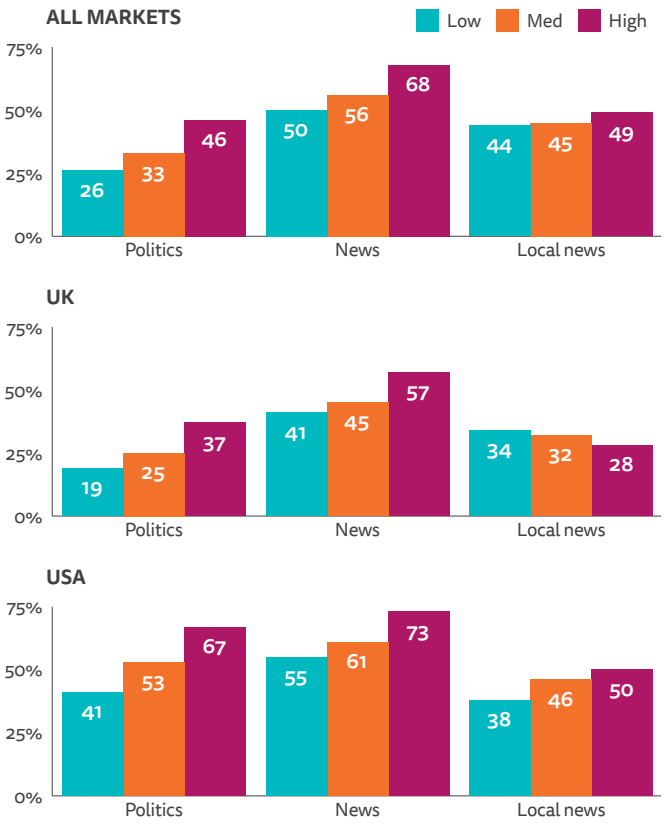
To some extent these findings are in line with what we find generally in news, with the young always somewhat less interested than the older generations. It is possible that they could grow into a local news habit as they age, but only if the agenda, tone, and content are right. Other demographics show a different and more surprising pattern. Interest in local news seems to be more evenly spread across those with high and low educational attainment than it is for other types of news. Indeed, in some markets, such as the United Kingdom, interest is greater amongst those with lower levels of education. This is worth noting as information inequalities are likely to get even worse if local news outlets contract or disappear.

PROPORTION VERY OR EXTREMELY INTERESTED IN LOCAL NEWS BY AGE – SELECTED COUNTRIES



QL1_2020. How interested, if at all, would you say you are in local news? *Base: 18–24/25–34/35–44/45–54/55+: USA = 258/378/348/243/828, Germany = 194/295/285/367/870, Norway = 277/261/352/361/759, Mexico =390/497/419/280/437, Chile = 255/403/371/359/617, Philippines = 543/532/394/279/271.*

PROPORTION VERY OR EXTREMELY INTERESTED IN POLITICS, NEWS, AND LOCAL NEWS BY EDUCATION



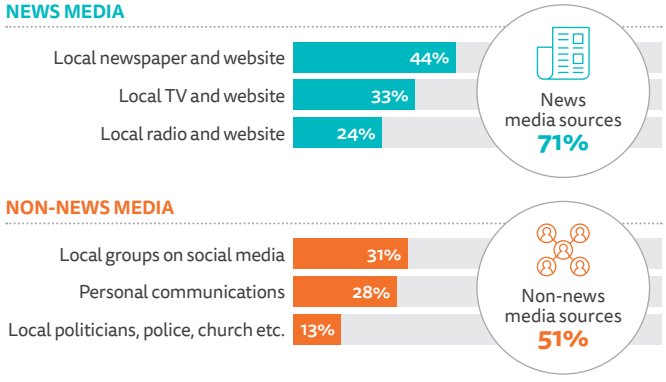
Q1c. How interested, if at all, would you say you are in news? **Q2_new2018.** How interested, if at all, would you say you are in politics? **QL1_2020.** How interested, if at all, would you say you are in local news? *Base: low/medium/highly educated: All markets = 12993/36904/30258, UK = 528/640/843, USA = 96/1051/908.*

WHERE DO PEOPLE GET LOCAL NEWS?

While local news businesses have struggled in their move to online, other regional and local actors have made use of digital infrastructures to establish direct contact with their relevant communities. Facebook groups, political parties, local enterprises, schools, and churches now represent important supplements, and sometimes serious competition, to traditional local news online as they provide hyperlocal information important to very specific audiences that may have never been looking for the whole local news package anyway (Möhring and Keldenich 2018). During the COVID-19 crisis local Facebook groups stepped up their game as they helped to drive support for local businesses affected by the pandemic.[22]

Our data show that these alternative providers are indeed competing strongly, with about half of our surveyed respondents across all markets using them. However, traditional local news sources still lead overall, with 71% of all those surveyed across countries relying on offline and online services offered by traditional local news media. On average, across countries local newspapers remain most important (44%), followed by local TV (33%). But local radio (24%) is already less important than some of the non-news alternatives. Across countries, almost a third (31%) of our sample say they used local groups or pages on social media (eg Facebook or WhatsApp) or online discussion groups in the last week as a source for local news. Personal communication from other residents, neighbours, friends, and/or family are seen as important sources for around a quarter (28%) across markets, while 13% say they rely on information coming directly from local institutions. The gap between news media and non-news media is now just 20 points, with new online forums providing a free, convenient, and relevant alternative.

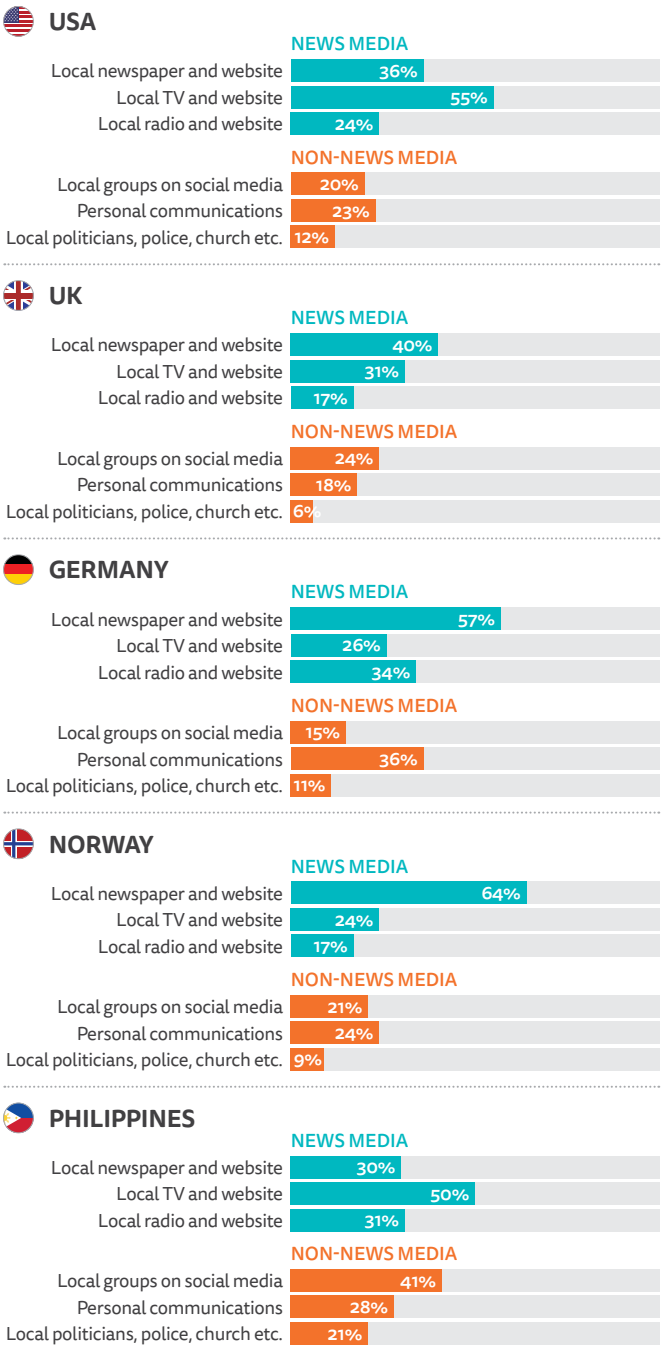
PROPORTION THAT USE EACH AS A SOURCE FOR LOCAL NEWS – ALL MARKETS



QL2_2020. Which of the following sources of local news, if any, have you used in the last week, regardless of whether you access them digitally (via their website, social media accounts, or an app) or offline? Please select all that apply. *Base: Total sample. All markets = 80155.*

Looking into individual countries, we see some variation in terms of importance. The newspaper dominates in Norway (64%) and Germany (57%) – both countries with strong reading traditions – but television is significantly ahead in the Philippines and the United States. Over half (55%) in the US use local TV weekly, with 36% reading local newspapers and a quarter tuning to local radio.

PROPORTION THAT USE EACH AS A SOURCE FOR LOCAL NEWS – SELECTED MARKETS



QL2_2020. Which of the following sources of local news, if any, have you used in the last week, regardless of whether you access them digitally (via their website, social media accounts, or an app) or offline? Please select all that apply. *Base: Total sample. USA = 2055, UK = 2011, Germany = 2011, Norway = 2010, Philippines = 2019.*

Social media are particularly important in the Philippines, which has one of the highest uses of Facebook in our survey. Four in ten (41%) of our online sample say they have relied on local social media groups in the past week. This number rises to 59% in Hong Kong and 56% in Kenya but is far lower in Germany (15%) as well as Japan (14%). In the US, where Facebook launched a big local news initiative in 2019, only 20% say they use local social media groups weekly. Findings for the US are mirrored by Pew data from two years ago showing that 'social media plays a moderate role in local news'.[23]

[22] https://communityimpact.com/houston/tomball-magnolia/dining/2020/04/01/facebook-groups-drive-support-to-local-restaurants-in-northwest-houston-areas/ or https://wchstv.com/news/local/new-facebook-groups-promote-tri-state-businesses-open-during-pandemic

[23] https://www.journalism.org/2019/03/26/overall-social-media-plays-a-moderate-role-in-local-news/

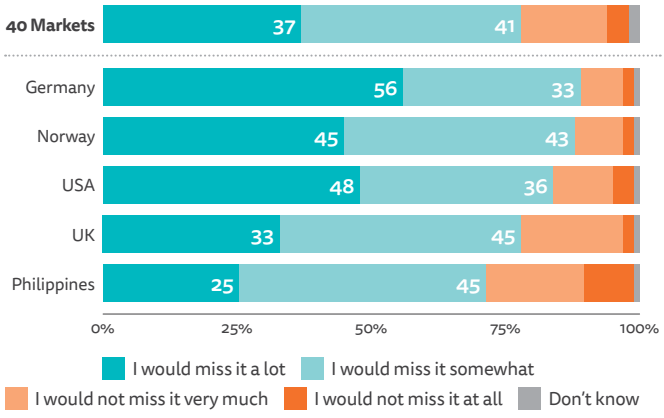
VALUE OF DIFFERENT NEWS SOURCES COMPARED

Local news media remain important to people in different neighbourhoods but how much would they miss them if they were no longer there? Across all countries, 37% of those that use local TV say they would miss it a lot and a further 41% would miss it somewhat. We see similar results for local newspapers with 35% saying they would miss them a lot and 43% saying somewhat. We see some country differences, partly aligned with usage of particular sources, but also with the extent of devolved political power – and therefore the importance of local news in the democratic process.

In Germany more than half of local TV (56%) or local newspaper users (54%) would strongly miss their local news source. This is only true for 25% of TV users and 20% of newspaper users in the Philippines.

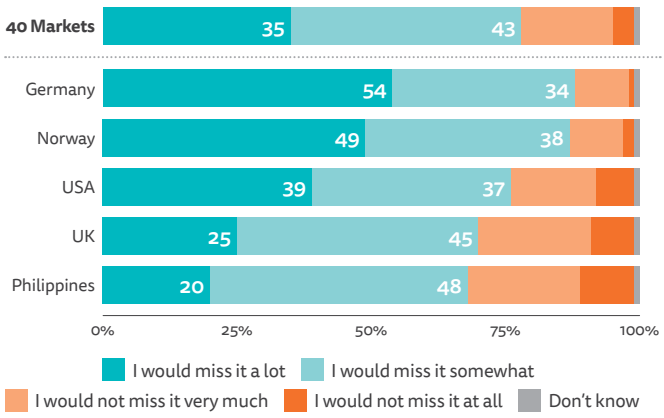
PROPORTION OF USERS THAT WOULD MISS THEIR LOCAL TV OR NEWSPAPER IF IT WENT OUT OF BUSINESS – SELECTED MARKETS

LOCAL TV



QL4_2020l_1. How much would you miss the below news source if it went out of business? *Base: Users of local TV news or local TV news websites: All markets = 26400, Germany = 515, Norway = 482, USA = 1120, UK = 627, Philippines = 1018.*

LOCAL NEWSPAPER



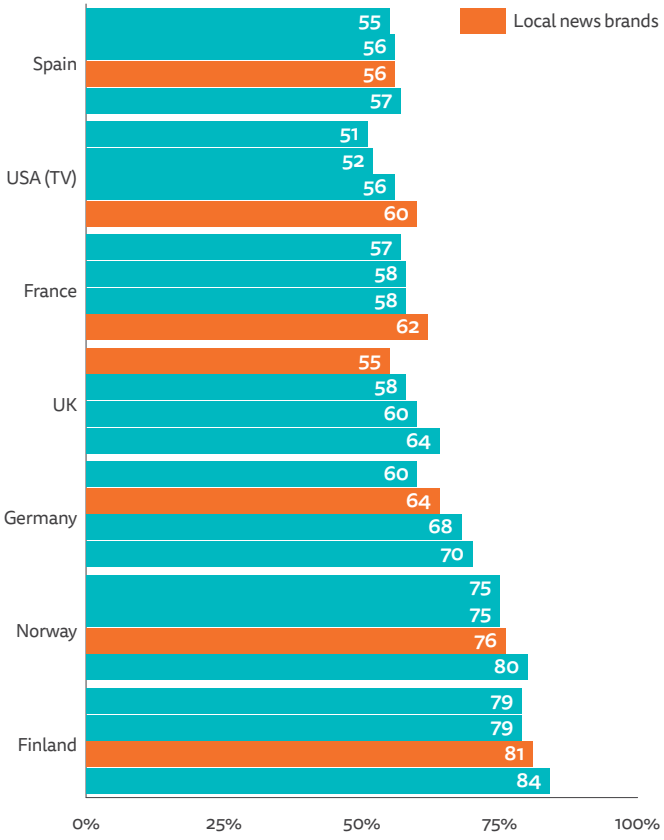
L4_2020l_3. How much would you miss the below news source if it went out of business? *Base: Users of local newspapers or local newspaper websites: All markets = 35323, Germany = 1136, Norway = 1283, USA = 730, UK = 835, Philippines = 602.*

LOCAL NEWS ALONG POLITICAL LINES

Local news is often considered to provide journalism that is more trusted and less partisan than national publications. This is partly a function of the fact that many local outlets have a commercial interest in serving the widest group of users and many public media outlets have obligations to do so. In other words, local media often do not have the luxury of reporting on behalf of one political side while ignoring the other. There are some exceptions, however, not least in the United States where some local media groups have recently been accused of supporting right-wing political agendas.[24] Similarly, some local newspapers in Germany were reproached for reporting rather uncritically about the right-wing populist party AfD. At the same time, local journalists have reported about being excluded from particular party events – in some cities they even face death threats and attacks against their offices.[25]

Our data show that in many of our surveyed markets regional and local news generally fare well in terms of trust. In the US and France, local news is the *most* trusted news brand, while in Finland, Norway, and Germany local newspapers are second to public broadcasters, that have also built much of their reputation on local TV and radio services. In the UK, local newspapers are trusted by 55%, fourth in the list and much higher than the average for commercial media. Elsewhere, local news brands are typically trusted by more than half the surveyed population – for example, in Mexico (59%) and the Philippines (64%).

POSITION OF LOCAL NEWS IN LIST OF MOST TRUSTED NEWS BRANDS – SELECTED COUNTRIES



Q6_2018_trust. How trustworthy would you say news from the following brands is? Please use the scale below, where 0 is 'not at all trustworthy' and 10 is 'completely trustworthy'. *Base: Total sample in each market: Spain = 2006, USA = 2055, France = 2038, UK = 2011, Germany = 2011, Norway = 2010, Finland = 2050.*

[24] https://nymag.com/intelligencer/2019/04/sinclair-broadcast-group-national-expansion-2020-sports-networks.html
[25] https://www.deutschlandfunk.de/lokaljournalismus-und-afd-noch-lange-kein-normales.2907.de.html?dram:article_id=434882

WILL LOCAL NEWS HAVE A CHANCE?

The COVID-19 crisis is focusing minds both on the value of local reporting but also on what could soon be lost. While some titles have already disappeared, others have been trying to demonstrate the value they can still provide with front pages and reporting that helps people get through the crisis.

But the economic pressures are building. Changes that might have unfolded over a decade are now set to happen in a much more compressed timescale and support will be needed. Facebook has already pledged a $100m package for local media, Google has announced a new Journalism Emergency Relief Fund, and some governments have stepped up with interim funding and other forms of support on a much more significant scale. But the crisis will unquestionably hurt the business of news, including local, far more than any of these packages can make up for. The long-term survival of local news will therefore depend on finding new sustainable business models, attracting the next generation of users, and moving faster towards online content and engagement. At the same time, professionally curated journalism for local areas still matters, offering orientation to readers and reflecting local interests. Local news organisations will have to prove themselves creative and courageous in order to quickly react to an ever-changing technological environment. The good news is that our data suggest there is still demand and trust for them – in general and even more so in times of crisis. The next year will be a real test to see how much local news is truly valued by audiences and governments across the world.

2.5 How People Access News about Climate Change

Simge Andı
Research Fellow, Reuters Institute for the Study of Journalism

Climate change is 'the defining issue of our time', according to the United Nations, with an impact that is global in scope and unprecedented in scale.[26] Attention may be focused today on the immediate threat of coronavirus, but this does not reduce the underlying dangers of climate change. The role of the news media is critical in influencing levels of public concern, but even though extreme weather events such as hurricanes, floods, and fires seem to be happening more regularly, many people still do not always feel personally or directly affected. Multilateral conferences can feel like remote talking shops, while scientific models around the implications for sea-level rise or migration can be hard to explain. A further challenge for the media has been in making coverage attractive to different segments, including the young, the partisan, and those currently indifferent to climate change.

But the past year seems to have marked a shift in terms of public and political interest, with more people across the globe, particularly the young, joining demonstrations and strikes led by next generation leaders like Greta Thunberg. Much of this support in turn has been mobilised not by traditional sources like television but through networked channels such as Facebook, YouTube, and Instagram. This generational pressure has combined with a series of real-life events which have included a record melting of the ice sheets, crop failures in the Mid-West, floods in Europe, and devastating fires in both the Amazon and Australia – all of which have raised climate issues higher up the media agenda. Some news organisations have also devoted more resource and editorial priority to the issue and there have been joint initiatives including Covering Climate Now which involves 400 media outlets.

In this chapter we explore in detail the different sources people use to learn more about climate change and how this is affected by age, education, and political affiliation. We also look at the extent to which different groups value the media's coverage of this complex subject and ask how it could be improved. Our analysis covers 40 markets, from Sweden to Kenya to the Philippines.

Volunteers and Fire Rescue officers fight a bushfire encroaching on properties in New South Wales December, 3, 2019 [AAP image/Dean Lewins]

[26] United Nations. 'Climate Change'. Accessed Apr. 2020. https://www.un.org/en/sections/issues-depth/climate-change/

THE MAJORITY ARE CONCERNED ABOUT CLIMATE CHANGE

Climate change really matters to most people. On average, across all markets, around 69% of respondents stated that they consider climate change to be an extremely or very serious problem. Less than one in ten (9%) of our respondents does not see climate change as serious while around one in five (19%) said they were somewhat concerned. There is some variation across countries. Around 90% of respondents in Chile, Kenya, and South Africa view climate change as very or extremely serious. Chile and some countries in Africa have historically shown high levels of concern[27], and the high figure for Chile could also have been related to its first internal population displacements last year as a result of a ten-year drought.[28] In Africa too, many countries are already severely affected by the consequences of climate change.[29] However, in Sweden, Norway, and the Netherlands, only around half (or less) think that climate change is a severe problem.

In most countries, we observe a clear consensus about the seriousness on the issue on one side, but also a small number of individuals who do not take climate change seriously at all. This may be because they feel disconnected from the issue, because they are sceptical of the science, or because they are worried about the economic impact of measures to tackle climate change.

The vast majority of markets in our dataset have fewer than 3% saying climate change is not serious at all. But scepticism (or indifference) is far higher in the United States (12%) as well as in Sweden (9%), Greta Thunberg's home country. Further, in Australia, 8% of respondents say that climate change is not serious at all, even though the country was going through devastating bush fires at the time of our fieldwork.

PROPORTION THAT THINK CLIMATE CHANGE IS NOT SERIOUS – SELECTED COUNTRIES

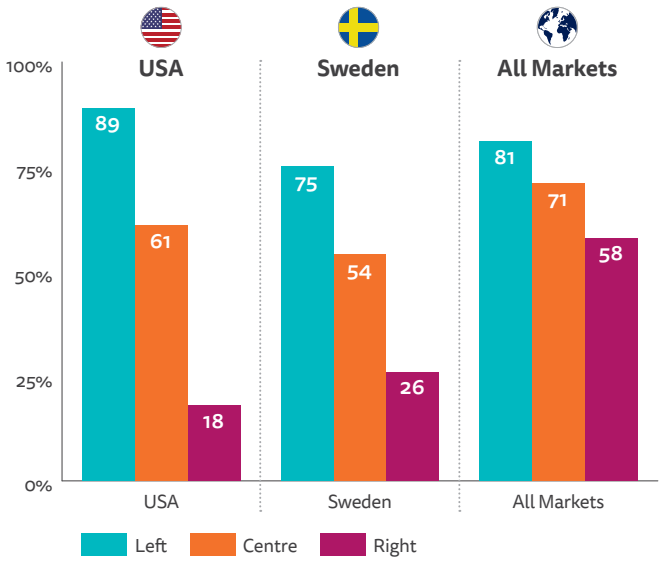
United States	12%
Sweden	9%
Australia	8%
Norway	7%
The Netherlands	5%
All markets average	**3%**

QC1_2020. How serious a problem, if at all, do you think climate change is? Showing % who say not serious at all. *Base: Total sample in each market.*

IDEOLOGICAL DIFFERENCES IN THE PERCEPTION OF CLIMATE CHANGE

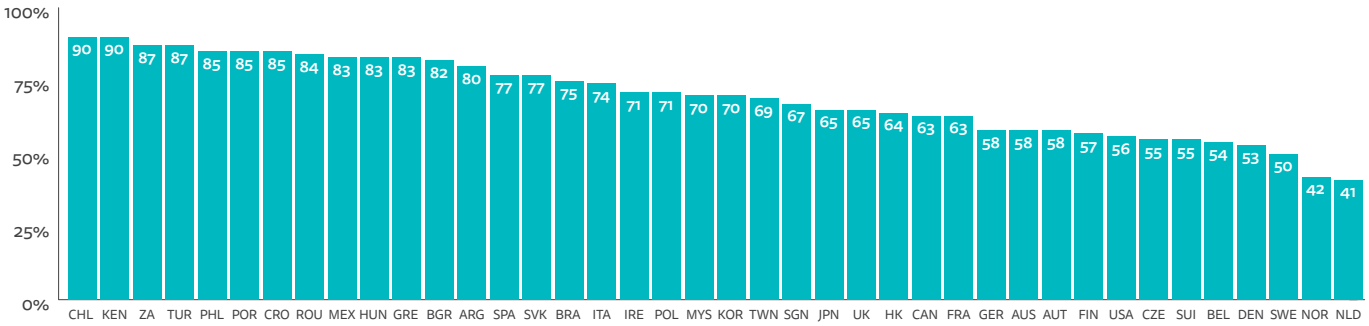
Political alignment may help explain some of the differences. Across markets, the more left one sits on the political spectrum, the more the levels of concern about climate change tend to rise. But in markets where the issue itself is highly politicised, the differences are even starker. In the United States, for instance, 89% of those who self-identify on the left report a serious concern about climate change, compared with just 18% of those who self-identify on the right. Right-wing media outlets in the United States have often taken a sceptical view of the scientific consensus while President Trump has announced plans to withdraw from the international Paris agreement because he thinks the restrictions will undermine the US economy. We find a similar divide in Sweden where right-wing websites play a significant role in opposing the consensus on a range of issues including climate change.

PROPORTION THAT THINK CLIMATE CHANGE IS VERY OR EXTREMELY SERIOUS BY POLITICAL LEANING – USA, SWEDEN, ALL MARKETS



QC1_2020. How serious a problem, if at all, do you think climate change is? **Q1F.** Some people talk about 'left', 'right', and 'centre' to describe parties and politicians. With this in mind, where would you place yourself on the following scale? *Base: USA Left = 507, Centre= 844, Right = 458, Sweden Left = 331, Centre = 924, Right = 540, All markets Left = 13843, Centre = 41779, Right = 10823.*

PROPORTION THAT THINK CLIMATE CHANGE IS VERY OR EXTREMELY SERIOUS – ALL MARKETS



QC1_2020. How serious a problem, if at all, do you think climate change is? Showing % who say very or extremely serious. *Base: Total sample in each market.*

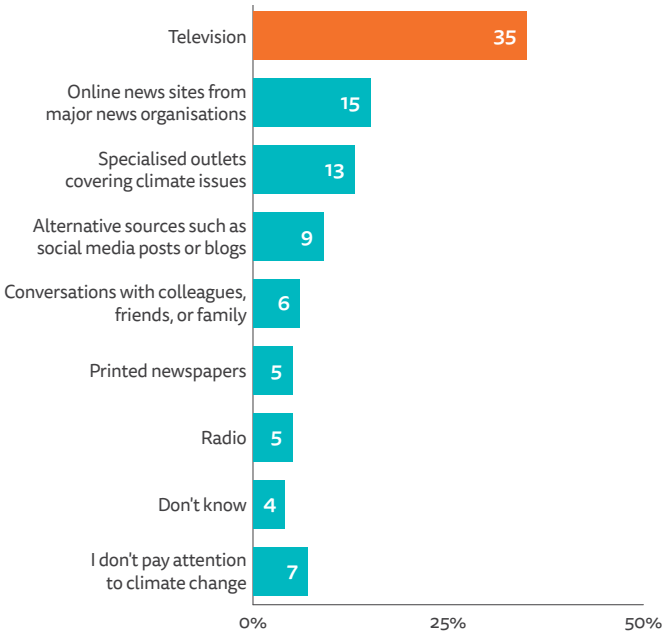
[27] https://www.pewresearch.org/global/2015/11/05/1-concern-about-climate-change-and-its-consequences/
[28] M. Rojas, 'Global Heating Plus Inequality is a Recipe for Chaos – Just Look at Chile', *Guardian* (8 Dec. 2019), accessed Apr. 2020, https://www.theguardian.com/commentisfree/2019/dec/08/un-conference-global-heating-cop25-chile-madrid-climate-crisis
[29] BBC, 'How Africa Will Be Affected by Climate Change?' (15 Dec. 2019), accessed Apr. 2020, https://www.bbc.co.uk/news/world-africa-50726701

SOURCES OF NEWS ON CLIMATE CHANGE

Our data show that people pay far more attention to television when it comes to climate change than to other forms of media. These findings are in line with previous research (Schäfer and Schlichting 2014), perhaps reflecting the power of the moving image to stir our emotions. Watching glaciers melt or seeing images of plastic clogging up our oceans can often have more impact than reading a news article containing scientific details of climate change.

Online news sites of major news organisations are the second most popular news source across all markets. Our survey respondents also pay attention to specialised outlets covering climate issues (13%) as well as alternative sources such as social media and blogs (9%). By comparison it is striking that printed newspapers and radio are even less important as a source of news than conversations with friends and family. On average, 7% of respondents across all markets stated that they do not pay attention to climate change news.

MOST USED SOURCES OF CLIMATE CHANGE NEWS – ALL MARKETS



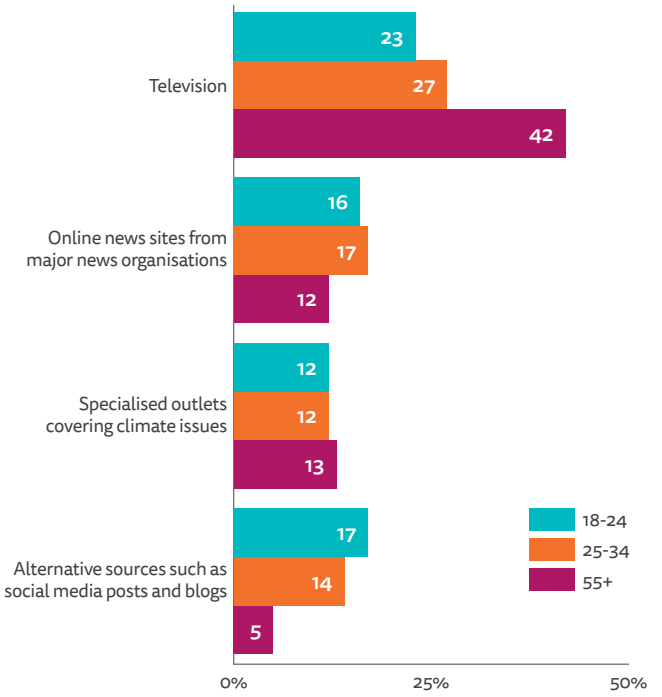
C2_2020. When it comes to climate change, which of the following sources of news, if any, do you _pay most_ attention to? Please select one. *Base: Total sample = 80155.*

HOW YOUNG PEOPLE ACCESS NEWS ABOUT CLIMATE CHANGE

While television is more prevalent among respondents over the age of 35, alternative sources such as social media and blogs are more popular among younger groups. 18–24s (so-called Generation Z) are three times as likely to access alternative sources of news around climate change when compared to over-55s.

In open comments our respondents told us more about their motivations for using social media. Many talked about the value they got from accessing news directly from activists. Others said they picked up news by following celebrities or influencers that they admired:

MOST USED SOURCES OF CLIMATE CHANGE NEWS BY AGE – ALL MARKETS



C2_2020. When it comes to climate change, which of the following sources of news, if any, do you _pay most_ attention to? Please select one. *Base: 18–24/25–34/55+: 9835/14424/274511.*

> ***I follow climate activists like Greta Thunberg [on social media] and follow what she does.***
>
> *Female, 19, UK*

> ***Leonardo DiCaprio posts on Instagram about climate change a lot – so does Cody Simpson.***
>
> *Female, 20, USA*

Others still talked about using a wide range of different sources in combination with mainstream media. This is in line with evidence noted in our Executive Summary that young people are more interested in news with a point of view and in accessing authentic and diverse perspectives from a wide range of digital sources, including podcasts and blogs.

> ***I get most of my news about climate change from smaller, independent news outlets such as commondreams.org as well as from various peoples' feeds, pages, and websites that post interesting, and scientific, and political content.***
>
> *Male, 25–34, USA*

> ***[I am] following politicians, activists, and leaders in the world posting about climate change and how the things we do affect our environment. The Earth is our past, present, and future and [I] think that climate change should be the number one priority in everyone's life.***
>
> *Female, 25–34, USA*

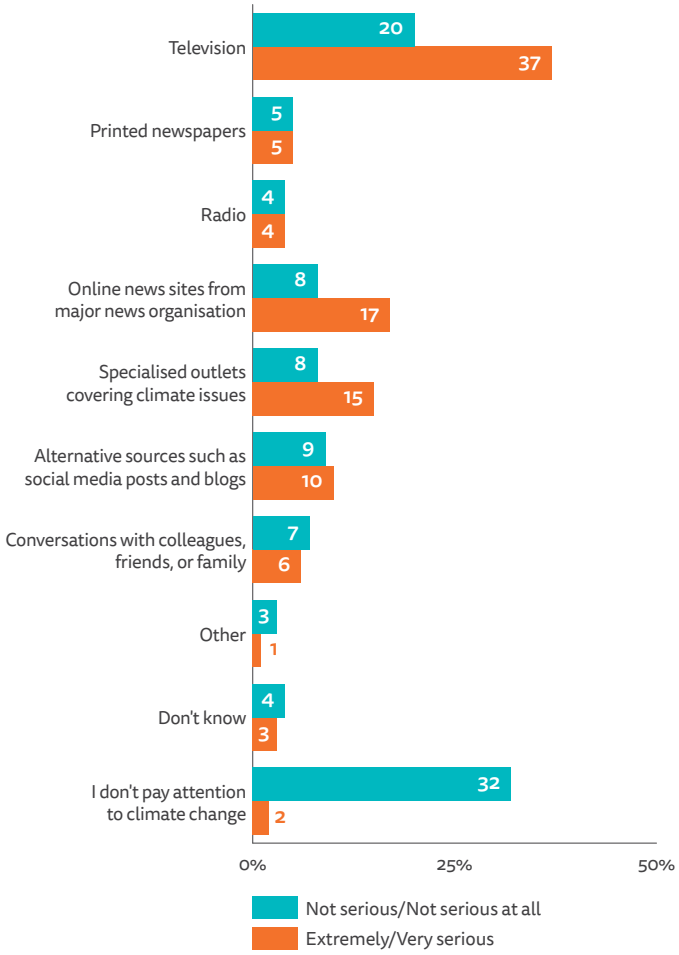
It is important to stress that, as well as following activists and influencers, younger groups are also accessing traditional brands in social media. Titles like *National Geographic*, for example, seem to be finding a new audience with its visual Instagram and Facebook posts on the subject.

SOURCES OF NEWS AMONGST THE LEAST CONCERNED

Around a third (32%) of those who report that climate change is not serious or not serious at all state that they do not pay attention to news about climate change. Many of these tend to have lower levels of education and are less interested in news more generally.

Those who do pay attention but are still sceptical are less likely to use mainstream media but just as likely to use alternative sources such as social media when compared with those that are more concerned. Only a fifth (20%) of those who say that climate change is not serious rely on television news compared with 37% of those that take it more seriously.

PROPORTION THAT THINK CLIMATE CHANGE IS SERIOUS BY MOST USED SOURCE OF NEWS – ALL MARKETS



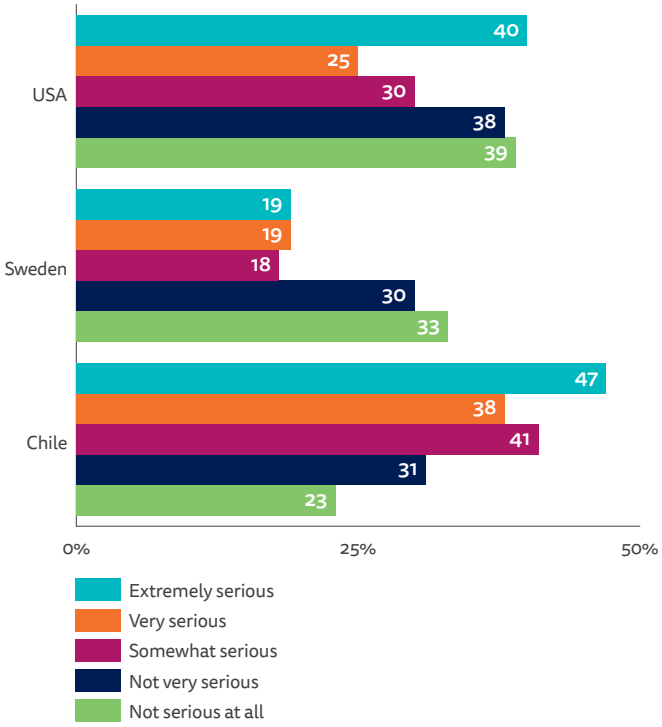
C2_2020. When it comes to climate change, which of the following sources of news, if any, do you _pay most_ attention to? Please select one. **QC1_2020.** How serious a problem, if at all, do you think climate change is? *Base: Extremely serious or Very serious/Not very serious or Not serious at all: 55693/6794.*

PARTICIPATION AND CLIMATE CHANGE

Those that are least concerned about climate change, while fewer in numbers, frequently report sharing news stories online – especially in polarised societies. For example, in the USA, those who say that climate change is not serious are as likely to share news about climate change via social media or email as those who are extremely concerned about climate change. And in Sweden, the least concerned are almost twice as likely to share news online as those who believe that climate change is a serious issue. In both these countries we see a highly vocal minority making a big noise online.

By contrast, in Chile, where we record the highest degree of concern over climate change, most of the online sharing comes from those with the highest levels of concern and this is the picture we find in most other countries.

PROPORTION SHARING NEWS BY CONCERN OVER CLIMATE CHANGE – USA, SWEDEN, CHILE

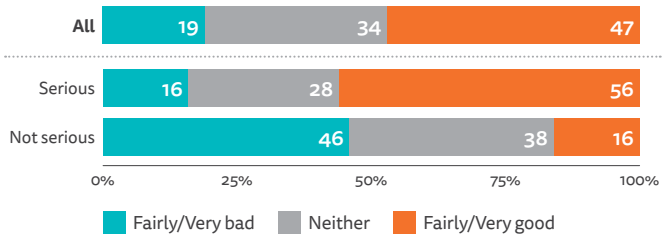


QC1_2020. How serious a problem, if at all, do you think climate change is? Showing % who say Extremely serious, Very serious, Somewhat serious, Not very serious, and Not serious at all. **Q13. Net:** Share a news story on social media or via email. *Base: Total sample in each country. USA = 2055, Sweden = 2091, Chile = 2005.*

HOW DO THE NEWS MEDIA PERFORM?

With an overall consensus about the seriousness of climate change, how do people feel the media are doing in covering the issue and informing the public? Across markets around half (47%) say that the news media do a good job in providing accurate information about climate change. By contrast, those who say the problem is *not* serious are far more likely to think the media are doing a bad job (46%) than a good job (16%).

PROPORTION THAT SAYS MEDIA PROVIDE ACCURATE INFORMATION ON CLIMATE CHANGE – ALL MARKETS



QC4a_2020. To what extent do the news media do a good or bad job in giving me accurate information about climate change? *Base: Total sample = 80155.* **QC1_2020.** How serious a problem, if at all, do you think climate change is? *Base: Extremely serious or Very serious/Not very serious or Not serious at all: 55693/6794. 'Don't know' responses have been added to Neither.*

Combined with their relatively high use of alternative sources such as social media this might suggest a loss of confidence by this group in the mainstream media. This may be due to how trustworthy or biased they think the news media are when it comes to reporting on climate change. As we've already learned, in the United States much of this relates to the highly charged political atmosphere and how this colours views on the mainstream media in general:

> ***Lies about climate control because [the] Democrats are full of shit.***
> *Male, 37, USA*

Elsewhere critics from both left and right accuse the media of not being bold enough in their coverage, being relentlessly doom-laden and negative, and following hidden agendas. Many of these critiques are not specific to climate change and are part of wider concerns about the news media:

> ***I don't trust corporate media sources to be frank enough about climate change.***
> *Male, 55–64, USA*

> ***Twitter allows people to speak freely on matters they know about, such as climate change, without the propaganda/indoctrination newspapers and TV has.***
> *Female, 18–24, UK*

> ***I would rather read a balanced report that looks at all factors than the 'we're doomed' coming from the likes of the BBC or Sky News.***
> *Male, 18–24, UK*

We observe a similar story when we ask about how well the media perform in terms of helping them understand what they can do personally about climate change, with an overall consensus that the media are doing a good job.

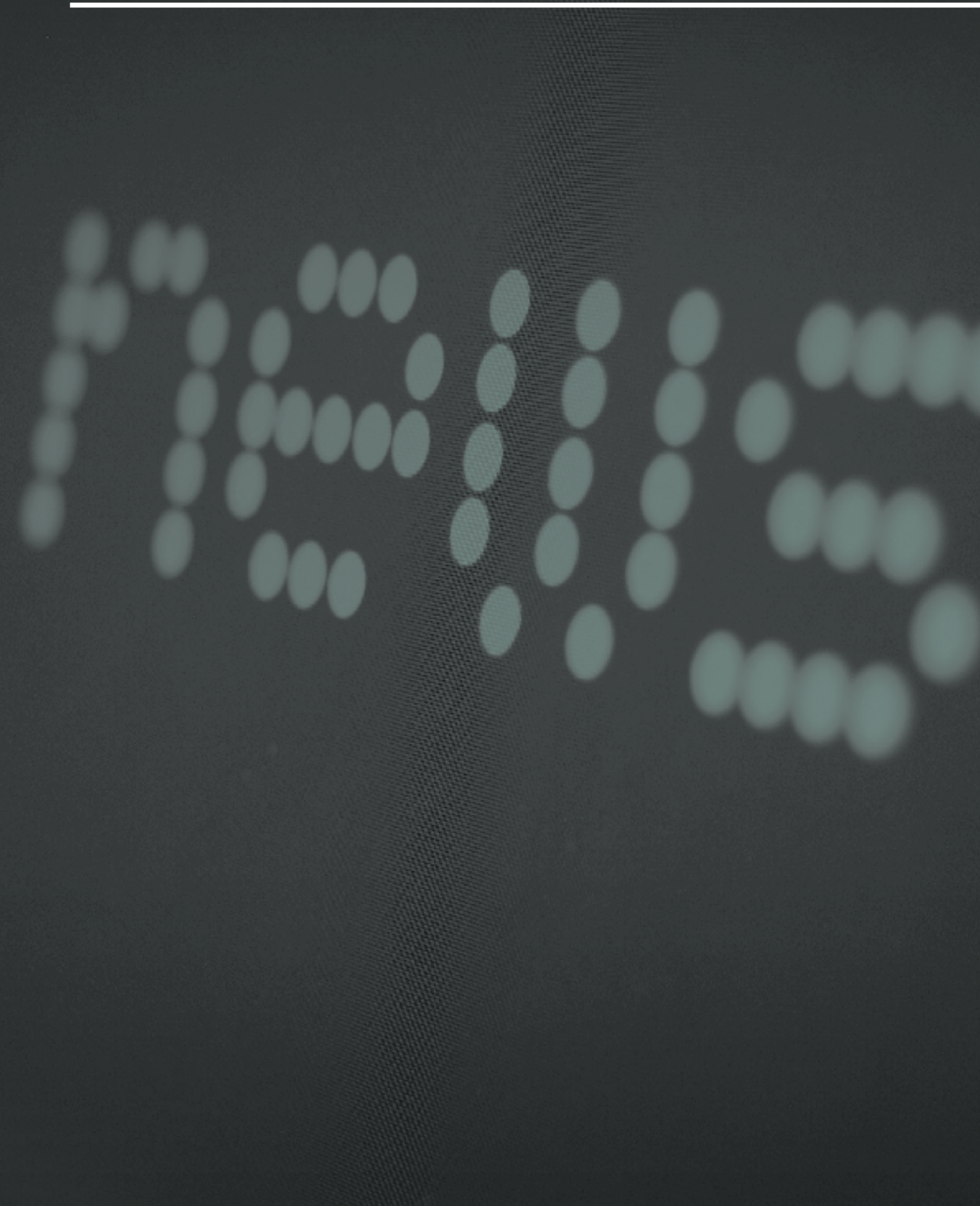
CONCLUSION

The majority of our respondents express serious concern about climate change, with only a minority that disagrees. But at least part of this group have different news consumption habits about climate change than the rest. They are highly critical of the mainstream media and often use alternative sources including social media. These attitudes are not unique to climate change but the issue reflects the existing strong divisions among different segments of the population – especially in countries that already have high levels of political polarisation.[30]

Young people are not as disapproving of the mainstream media while still embracing alternative media sources in a search for authenticity and more diverse points of view. All of this is challenging for news organisations in terms of catering for different audiences and producing content in new formats. There is also a new level of competition with influencers and celebrities where journalists are now just one source amongst many.

Some media organisations are responding to these trends by taking a clearer stand. The *Guardian*, for example, has started to talk about 'climate emergency' rather than climate change. Other publications have started to take more content that is sponsored by NGOs and foundations with an interest in shifting policy choices. But any shift towards more campaigning journalism will also need to bear in mind the partisan differences in attitude to the subject revealed in this report and the widespread desire for a lack of hidden agendas if trust is to be maintained.

[30] Using a logistic regression (dependent variable: scepticism 0-1) across all markets with country fixed effects, we test the relationship between climate change scepticism and the media sources used for climate change, while controlling for political alignment (left-right), frequency of access to news, interest in news, trust in news, gender, age, education. We find statistically significant and negative relationships between various types of media sources (TV, online news, alternative sources, print, radio, specialised outlets on climate change) and scepticism. Those who report 'not paying attention' to news sources about climate change are more likely to be sceptical about climate change. Further, climate change scepticism and right-wing political ideology are positively linked, meaning that those who are on the right end of the political spectrum are more likely to report climate change scepticism. Women and those with higher levels of education are, on average, less likely to be sceptical about climate change. We also find that the more people trust in news, the less they report being sceptical about climate change. All results reported here are statistically significant ($p < 0.05$).



SECTION 3

Country and Market Data

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

These include an overview of consumption in each market, including details of the most popular news brands – traditional and online. The pages also contain statistics about the use of new devices such as smartphones and tablets and the role of different social networks for news. Information is drawn from the 2020 *Digital News Report* survey using the methodology outlined on p. 6, with the exception of population and internet levels which are drawn from *Internet World Statistics* (2019).

Due to the coronavirus crisis and to simplify production, we have decided not to include an accompanying commentary on each market this year. However, we have published some additional contextual background online at digitalnewsreport.org along with data and charts for all the countries.

Whilst most of our countries see internet penetration of 80% or more, some countries have lower levels of access. It should also be noted in particular that in Argentina, Brazil, Bulgaria, Chile, Greece, Kenya, Mexico, Philippines, Romania, South Africa, and Turkey our samples tend to be based more around urban areas. Our sample in Kenya only includes those aged 18-54 due to difficulties in reaching older people online. Many international comparisons will still be relevant in terms of understanding differences in the online sphere, but anyone interpreting these results should be careful not to suggest these figures represent the total adult population, especially when considering offline versus online consumption.

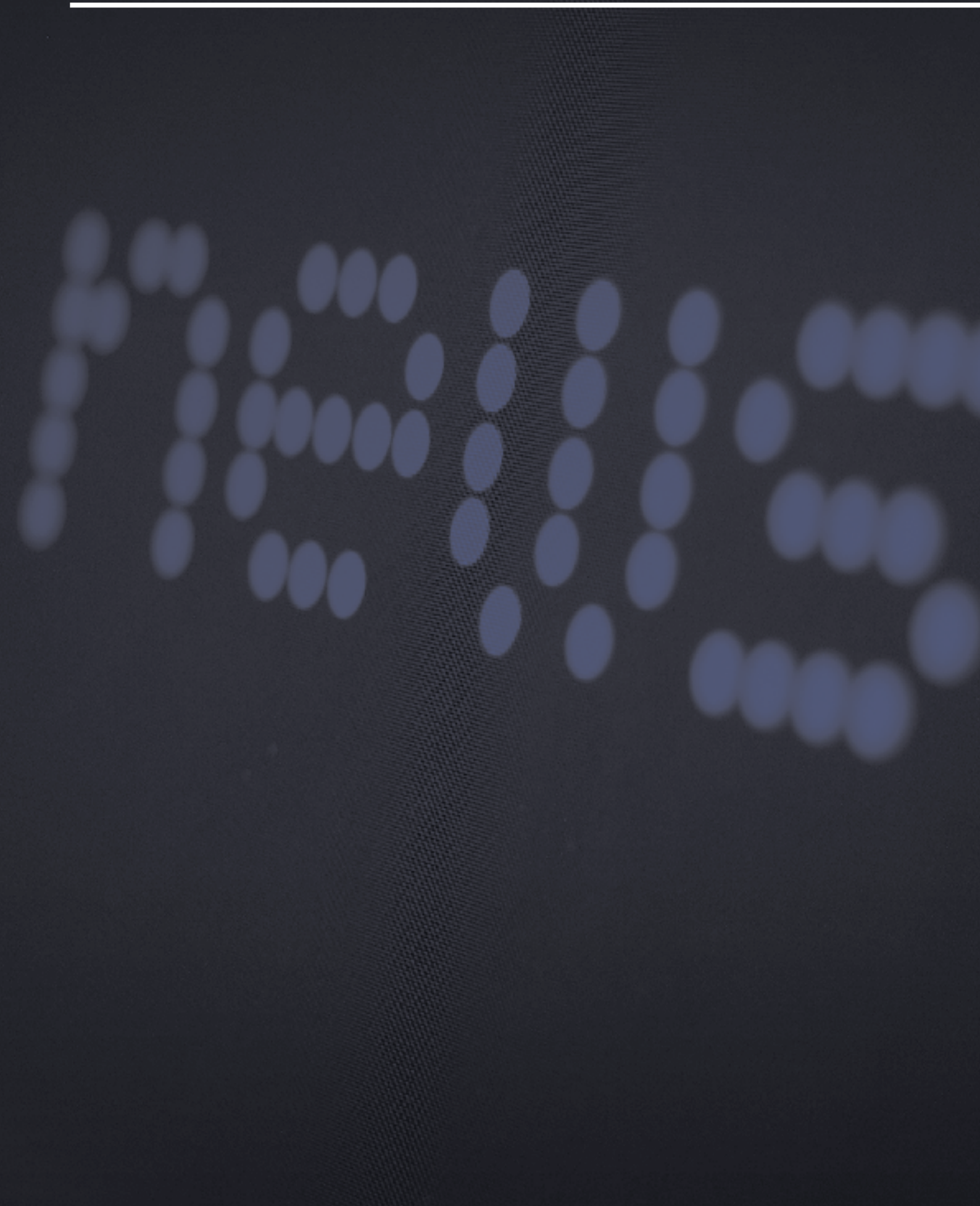
Please note that this year we have changed our brand level trust figures to show the percentage that trust/don't trust each news brand – rather than just showing the mean. We feel this gives a clearer picture of how some brands are perceived by different groups. We ask respondents to rate each brand on a 0-10 scale (ranging from 'Not at all trustworthy' to 'Completely trustworthy') with the 'Trust' percentage being those who rated 6–10 and the 'Don't trust' figure the sum of those who rated 0–4. Those that selected 5 ('Neither trustworthy nor untrustworthy') are shown as 'Neither. Those that said they have not heard of each brand were excluded. We have also made the number of brands in each country more consistent and as far as possible focused on just the most popular news brands in each country.

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

EUROPE		
3.01	United Kingdom	62
3.02	Austria	63
3.03	Belgium	64
3.04	Bulgaria	65
3.05	Croatia	66
3.06	Czech Republic	67
3.07	Denmark	68
3.08	Finland	69
3.09	France	70
3.10	Germany	71
3.11	Greece	72
3.12	Hungary	73
3.13	Ireland	74
3.14	Italy	75
3.15	Netherlands	76
3.16	Norway	77
3.17	Poland	78
3.18	Portugal	79
3.19	Romania	80
3.20	Slovakia	81
3.21	Spain	82
3.22	Sweden	83
3.23	Switzerland	84
3.24	Turkey	85

AMERICAS		
3.25	United States	88
3.26	Argentina	89
3.27	Brazil	90
3.28	Canada	91
3.29	Chile	92
3.30	Mexico	93
ASIA PACIFIC		
3.31	Australia	96
3.32	Hong Kong	97
3.33	Japan	98
3.34	Malaysia	99
3.35	Philippines	100
3.36	Singapore	101
3.37	South Korea	102
3.38	Taiwan	103
AFRICA		
3.39	Kenya	106
3.40	South Africa	107

18/06/2020: An earlier version of the report incorrectly stated that the brand trust figures included all that have not heard of each brand in the 'Neither' bar. However, those that had not heard of each brand were excluded. We have edited the labels to correctly describe the data, but the figures themselves are unchanged. We apologise for the error.



SECTION 3

Country and Market Data **Europe**

EUROPE		
3.01	United Kingdom	62
3.02	Austria	63
3.03	Belgium	64
3.04	Bulgaria	65
3.05	Croatia	66
3.06	Czech Republic	67
3.07	Denmark	68
3.08	Finland	69
3.09	France	70
3.10	Germany	71
3.11	Greece	72
3.12	Hungary	73
3.13	Ireland	74
3.14	Italy	75
3.15	Netherlands	76
3.16	Norway	77
3.17	Poland	78
3.18	Portugal	79
3.19	Romania	80
3.20	Slovakia	81
3.21	Spain	82
3.22	Sweden	83
3.23	Switzerland	84
3.24	Turkey	85

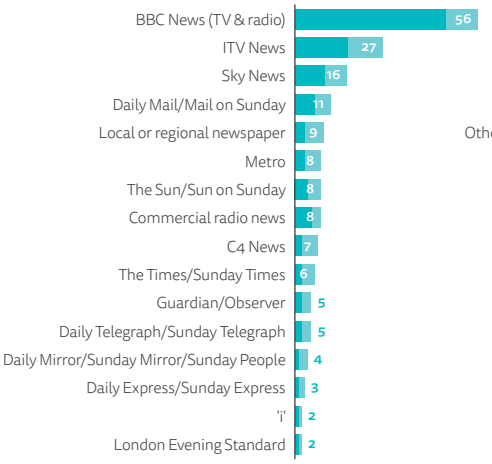
Population	67m
Internet penetration	95%

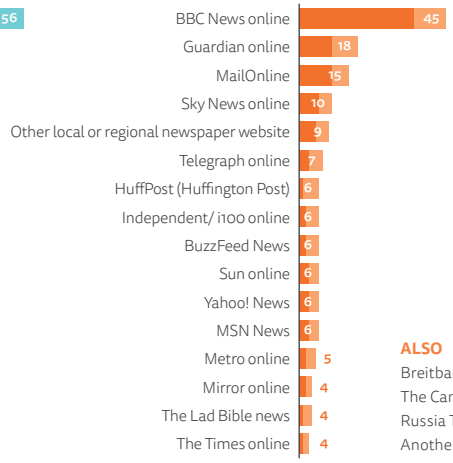
UNITED KINGDOM

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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





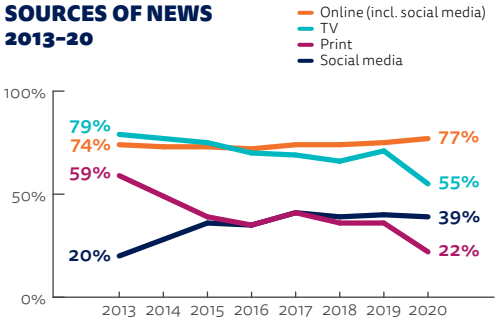
ALSO

Breitbart	1%
The Canary	1%
Russia Today	1%
Another Angry Voice	1%

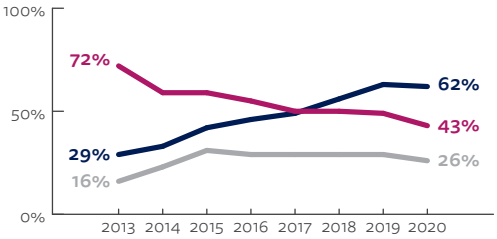
CHANGING MEDIA

TV news reach declined to 55% in January before bouncing back during the coronavirus crisis (see Executive Summary chart). This year's fall in print is partly due to a change of panel weighting implemented to make our data more accurate – though circulation was adversely affected by the COVID-19 lockdown.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20



TRUST

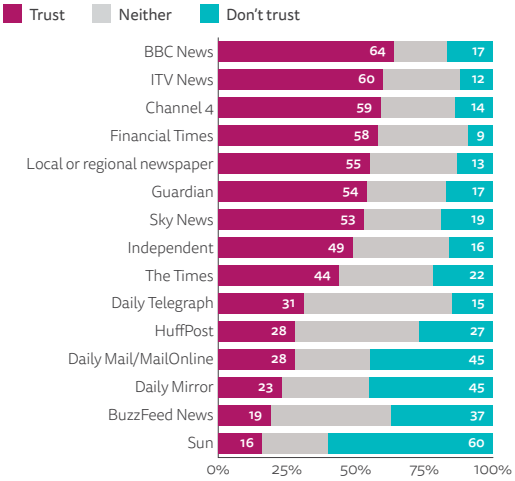
Trust in the news has fallen over 20 percentage points since 2015. Even the most trusted brands like the BBC are seen by many as pushing or suppressing agendas – especially over polarising issues like Brexit. Broadcasters have higher levels of trust than digital-born brands and tabloids, some of which have high levels of distrust.

DIFFERENT TYPES OF TRUST

News overall	News I use
28% (-12) =32nd/40	39%

News in search	News in social
15%	6%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

7% pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	24%	(-4)	65%
2	Twitter	14%	(-)	29%
3	YouTube	7%	(-3)	51%

Rank	Brand	For News		For All
4	WhatsApp	7%	(-2)	56%
5	Facebook Messenger	5%	(-1)	46%
6	Instagram	3%	(-1)	30%

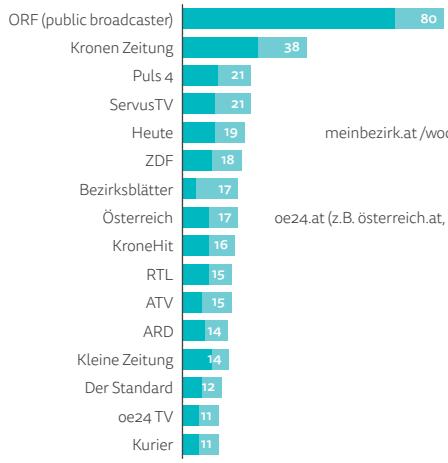
Population	8.8m
Internet penetration	88%

AUSTRIA

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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



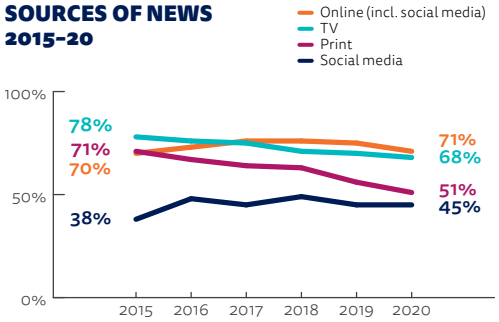
ALSO

Unzensuriert	4%
Kontrast	4%
Info Direkt	2%
Alles Roger?	1%
Contra Magazin	1%

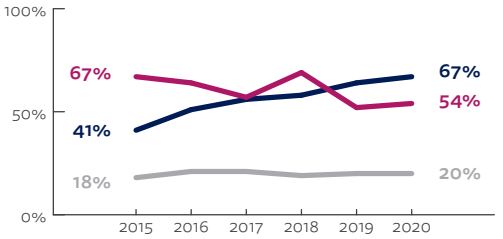
CHANGING MEDIA

Austria has traditionally had the highest levels of print readership in our survey but this has fallen by almost 20 percentage points in just six years. TV news reach is also substantially down in our pre-COVID-19 survey, though public broadcaster ORF has transferred much of its offline strength online.

SOURCES OF NEWS 2015-20



DEVICES FOR NEWS 2015-20*



*2018 figures for computer use were likely overstated due to an error in polling.

TRUST

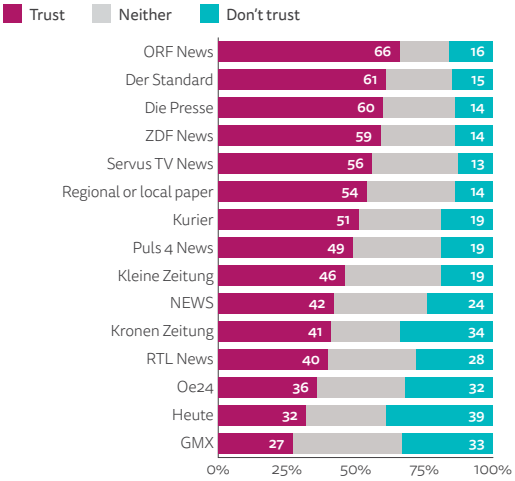
The role played by the media in the fall from government of the right-wing freedom party FPÖ has bolstered trust with liberal voters – and overall. The party had been on a collision course with many news media as it tried to control the agenda but plans to reform the popular public service media (ORF) have now been greatly reduced.

DIFFERENT TYPES OF TRUST

News overall	News I use
40% (+1) 16th/40	51%

News in search	News in social
24%	17%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

11% +2
pay for
ONLINE NEWS

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	30%	(-1)	60%
2	WhatsApp	23%	(-)	76%
3	YouTube	21%	(-2)	63%

Rank	Brand	For News		For All
4	Instagram	9%	(+1)	30%
5	Facebook Messenger	7%	(+1)	31%
6	Twitter	5%	(+1)	10%

Population 12m
Internet penetration 94%

BELGIUM

WEEKLY REACH OFFLINE AND ONLINE

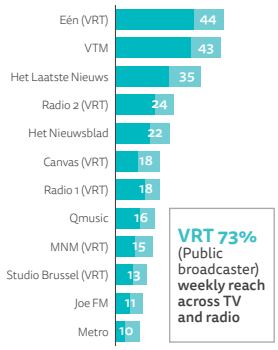
TOP BRANDS
% Weekly usage

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

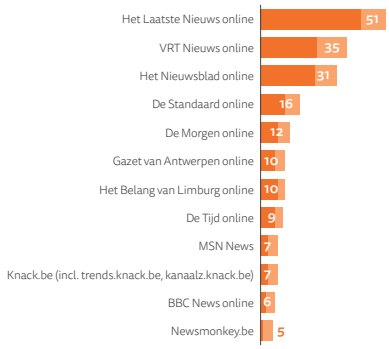
12% pay for **ONLINE NEWS**
Wallonia 11% | Flanders 12%

26% listened to **PODCASTS** in the last month

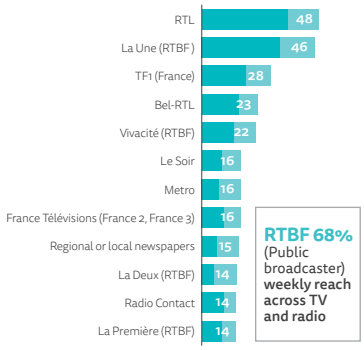
TV, RADIO AND PRINT (FLEMISH)



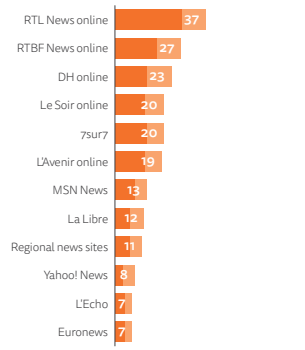
ONLINE (FLEMISH)



TV, RADIO AND PRINT (FRENCH)



ONLINE (FRENCH)

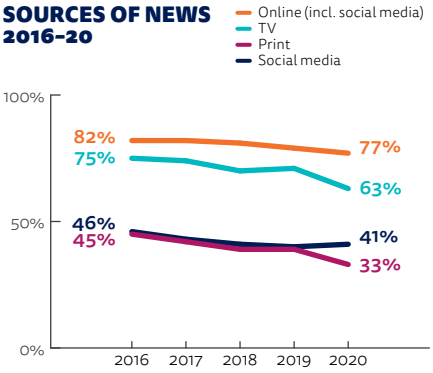


DIFFERENT TYPES OF TRUST

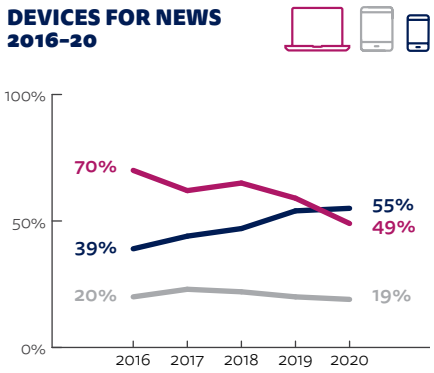
News overall	News I use
45% (-4) =10th/40	**50%**
Wallonia 36%	Wallonia 42%
Flanders 51%	Flanders 56%

News in search	News in social
27%	**18%**
Wallonia 25%	Wallonia 19%
Flanders 28%	Flanders 17%

SOURCES OF NEWS 2016-20



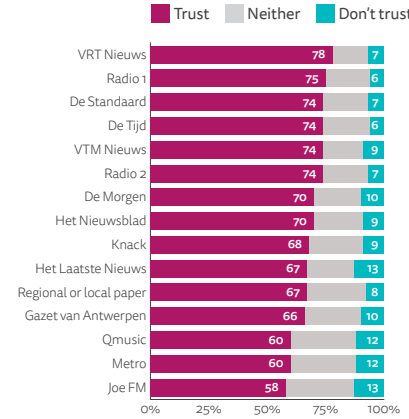
DEVICES FOR NEWS 2016-20



TOP SOCIAL MEDIA AND MESSAGING

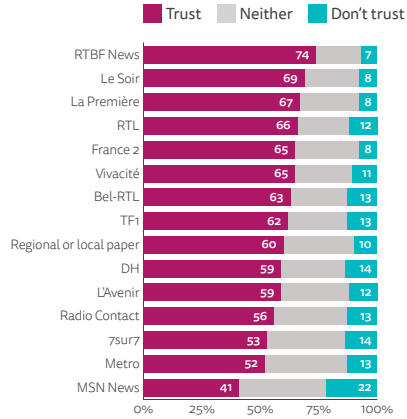
Rank	Brand	For News		For All
1	Facebook	41%	(-1)	67%
2	YouTube	16%	(-1)	52%
3	Facebook Messenger	12%	(-)	47%
4	WhatsApp	9%	(-1)	41%
5	Instagram	8%	(+1)	28%
6	Twitter	5%	(+1)	13%

BRAND TRUST SCORES (FLEMISH)



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

BRAND TRUST SCORES (FRENCH)



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

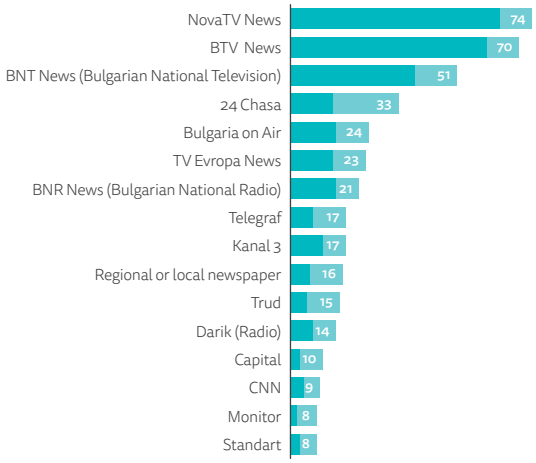
Population 7m
Internet penetration 67%

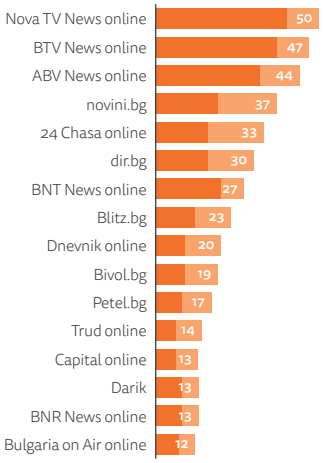
BULGARIA*

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

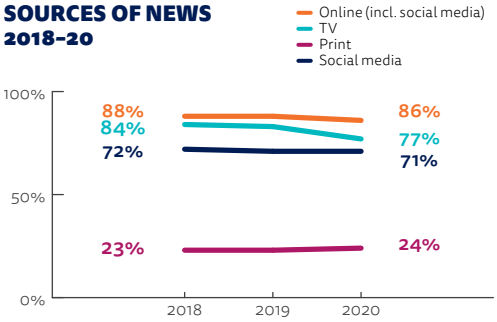




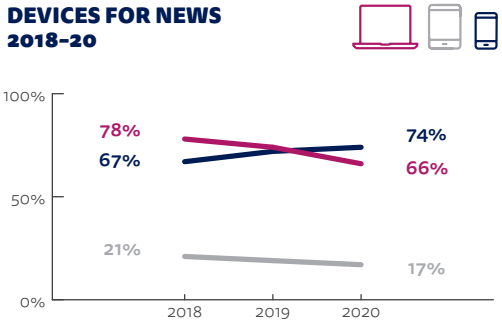
CHANGING MEDIA

Television remains an important source of news in Bulgaria, with many of the main TV networks now owned by businessmen with political connections. Independent media still operate in print and online while social media news use is amongst the highest in Europe.

SOURCES OF NEWS 2018-20



DEVICES FOR NEWS 2018-20



TRUST

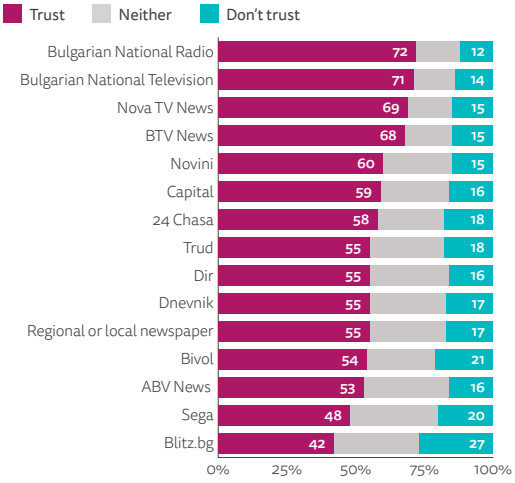
Many news organisations in Bulgaria have become reliant on funding from pro-government oligarchs or foreign foundations. This in turn may have reduced independence and trust – down seven percentage points this year. Public broadcasters BNT and BNR are less popular in terms of reach than commercial rivals, but remain the most trusted for news in our survey.

DIFFERENT TYPES OF TRUST

News overall	News I use
33% (-7) =25th/40	37%

News in search	News in social
32%	28%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

10% +3
pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	69%	(-5)	80%
2	YouTube	35%	(+1)	70%
3	Facebook Messenger	20%	(-)	57%
4	Viber	17%	(+1)	58%
5	Instagram	12%	(+2)	31%
6	Twitter	8%	(+2)	16%

*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

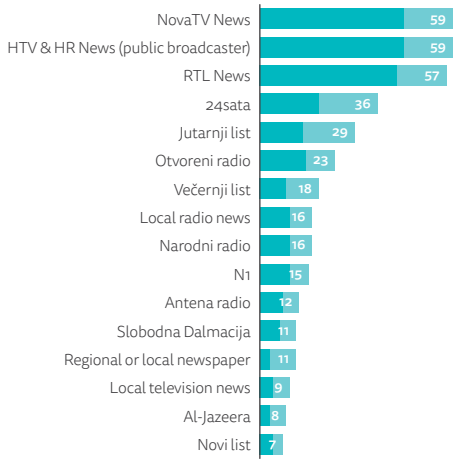
Population	4.1m
Internet penetration	92%

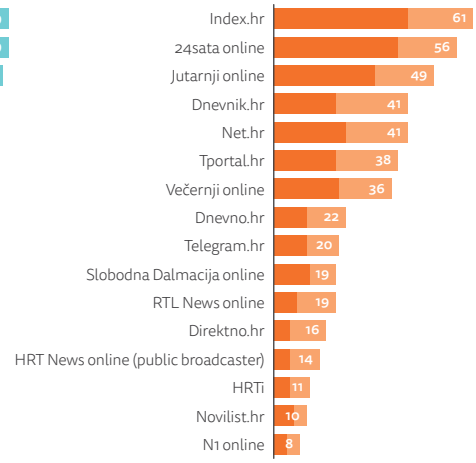
CROATIA

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

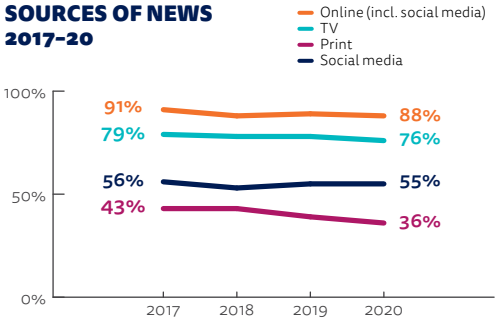




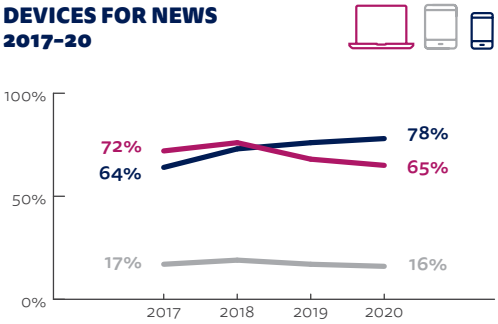
CHANGING MEDIA

The Croatian media market is characterised by strong commercial television providers and a print sector struggling to adapt to digital. Internet penetration in Croatia is now over 90% and this growing connectedness is reflected in smartphone use – 78% now use the device for news weekly.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

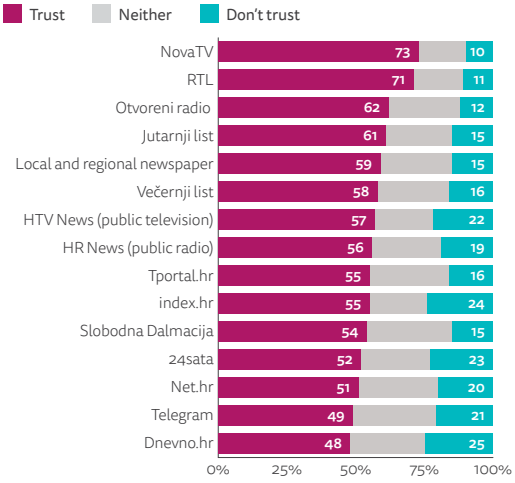
Trust in the news has been pretty much unchanged for the last two years, despite a series of media exposés of corruption by government ministers. In regard to media brands, the two online portals identified with the right-wing (Dnevno.hr) and left/liberal (Index.hr) have the highest levels of distrust. Mainstream television and daily papers engender most trust.

DIFFERENT TYPES OF TRUST

News overall	News I use
39% (-1) =17th/40	42%

News in search	News in social
32%	29%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

7% +1 pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	55%	(-1)	74%
2	YouTube	28%	(-)	74%
3	WhatsApp	16%	(+2)	61%
4	Viber	14%	(+1)	59%
5	Facebook Messenger	11%	(-1)	52%
6	Instagram	10%	(-)	37%

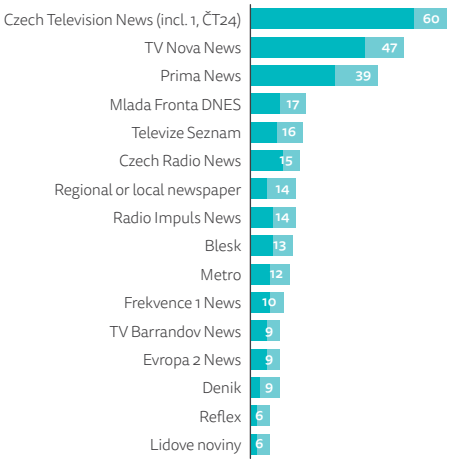
Population 10.6m
Internet penetration 88%

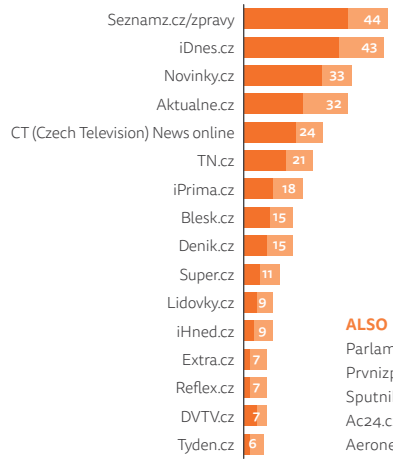
CZECH REPUBLIC

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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





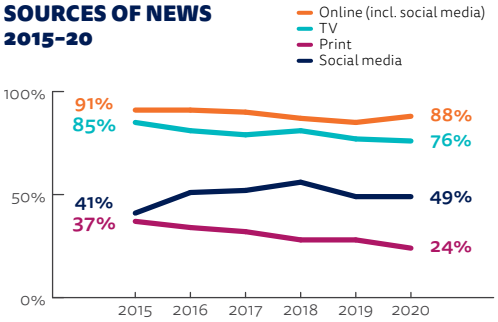
ALSO

Parlamentnilisty.cz	15%
Prvnizpravy.cz.	4%
Sputnik	3%
Ac24.cz	3%
Aeronet.cz	2%

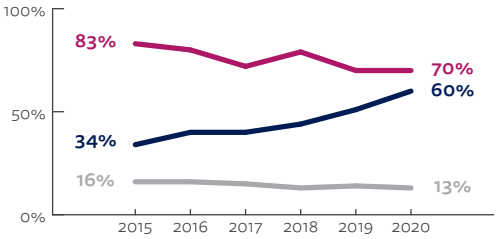
CHANGING MEDIA

The Czech media market has experienced significant ownership concentration in recent years with control shifting towards domestic tycoons. Offline sources such as TV and print are becoming less important over time, with the smartphone now a key device for accessing online news.

SOURCES OF NEWS 2015-20



DEVICES FOR NEWS 2015-20*



*2018 figures for computer use were likely overstated due to an error in polling.

TRUST

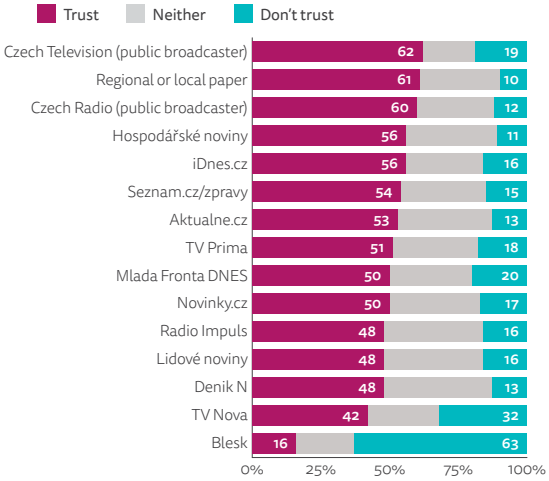
The tendency towards declining trust in news, recorded in previous years, has stalled, even if the overall trust figures are still comparatively low. Public broadcasters remain most trusted alongside local and regional news, while tabloids and some commercial TV stations are trusted least.

DIFFERENT TYPES OF TRUST

News overall	News I use
33% (-) =25th/40	38%

News in search	News in social
29%	16%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

10% +3
pay for
ONLINE NEWS

TOP SOCIAL MEDIA AND MESSAGING

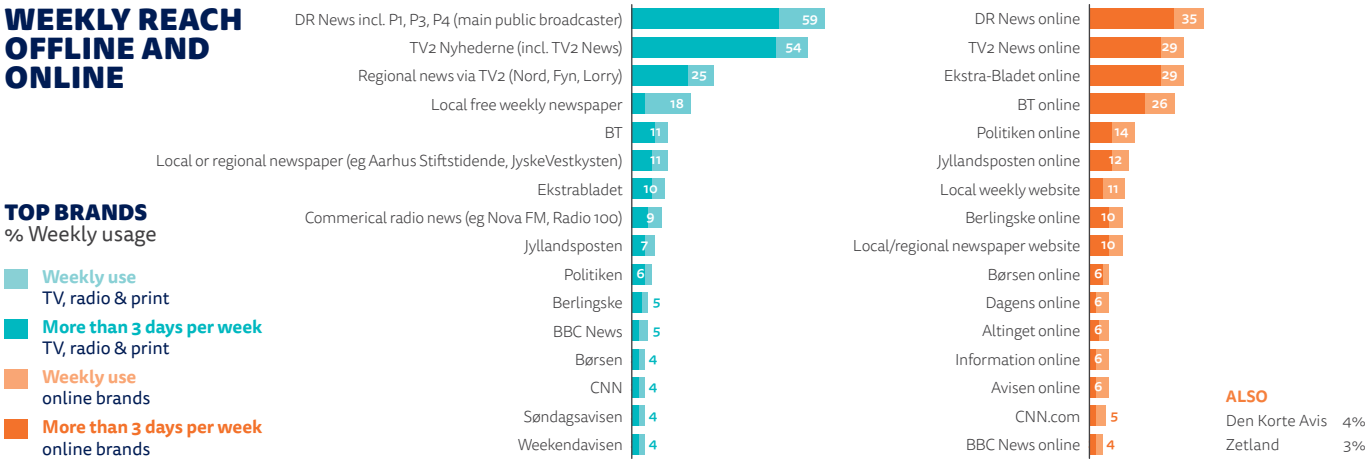
Rank	Brand	For News		For All
1	Facebook	45%	(-5)	71%
2	YouTube	23%	(-3)	66%
3	Facebook Messenger	15%	(-2)	50%

Rank	Brand	For News		For All
4	WhatsApp	13%	(+3)	41%
5	Instagram	9%	(+1)	26%
6	Twitter	4%	(-)	8%

Population 5.7m
Internet penetration 98%

DENMARK

WEEKLY REACH OFFLINE AND ONLINE



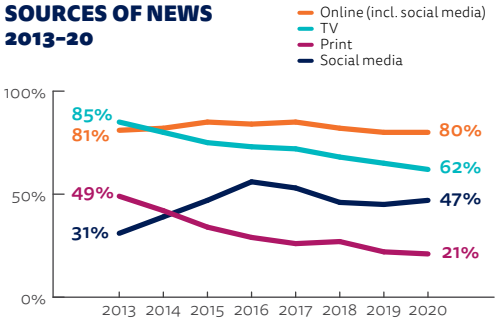
TOP BRANDS
% Weekly usage

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

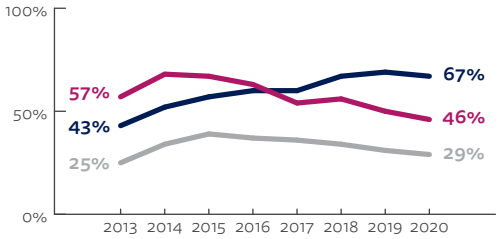
CHANGING MEDIA

Danes are adjusting to reductions in funding to public service broadcasting which came into effect in 2020. Reach for public broadcasters and for TV news has fallen significantly since 2013. Meanwhile commercial print newspapers, many of whom were already struggling, have received some government support following the COVID-19 crisis.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20



TRUST

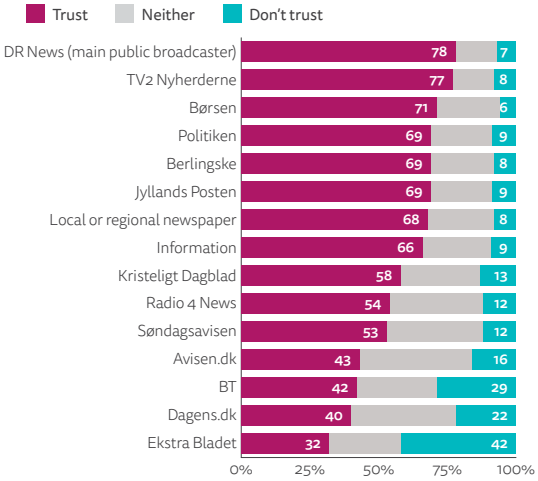
Trust in the news overall has fallen substantially in the last year (down 11 percentage points) but, despite some decline, trust in specific media brands remains relatively high compared to other countries. Public broadcasters DR and TV2 still carry the most trust, with popular tabloid *Ekstra Bladet* trusted least.

DIFFERENT TYPES OF TRUST

News overall	News I use
46% (-11) 9th/40	52%

News in search	News in social
21%	14%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

17% +2
pay for
ONLINE NEWS

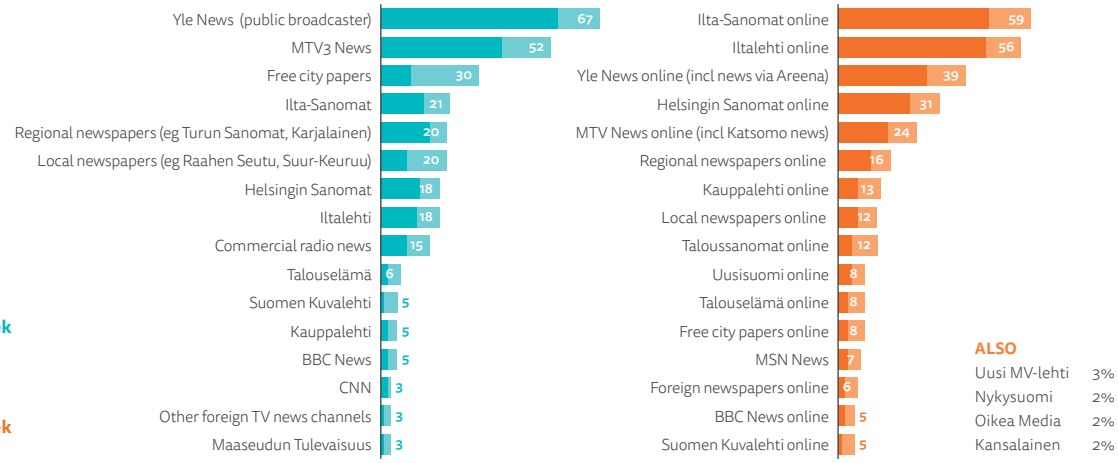
TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	37%	(+1)	74%
2	YouTube	10%	(+1)	53%
3	Facebook Messenger	9%	(+1)	55%
4	Instagram	7%	(+1)	37%
5	Twitter	5%	(-)	12%
6	WhatsApp	2%	(-1)	11%

Population 5.6m
Internet penetration 94%

FINLAND

WEEKLY REACH OFFLINE AND ONLINE



TOP BRANDS
% Weekly usage

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

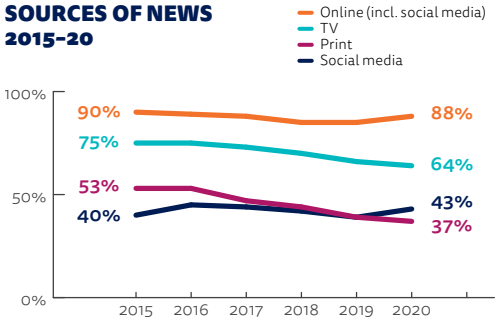
ALSO

Uusi MV-lehti	3%
Nykysuomi	2%
Oikea Media	2%
Kansalainen	2%

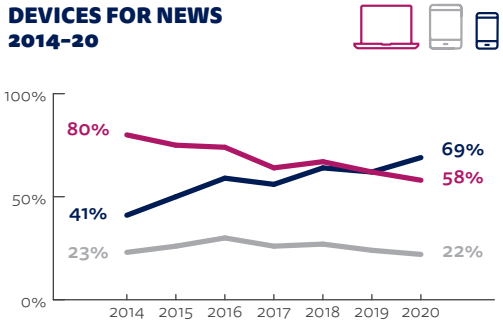
CHANGING MEDIA

The news media is characterised by a strong regional press, a strong public broadcaster (YLE), one widely read national daily (*Helsingin Sanomat*), and two popular evening tabloids, both reaching over half of the adult population. TV audiences continue to fall, while online the smartphone has overtaken computers for accessing news for the first time.

SOURCES OF NEWS 2015-20



DEVICES FOR NEWS 2014-20



TRUST

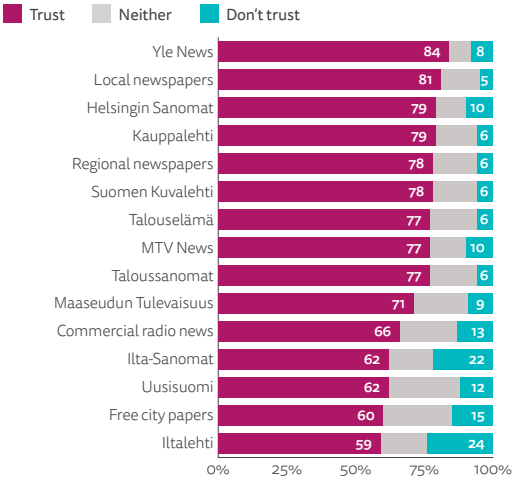
While still comparatively very high, trust in news is slowly declining. This may be because of polarising tendencies in this traditionally consensual society or because the debate about so called 'fake news' has undermined trust overall. The national broadcasting company Yle remains the most trusted news source in Finland while the popular tabloids have highest levels of distrust.

DIFFERENT TYPES OF TRUST

News overall	News I use
56% (-3) =1st/40	69%

News in search	News in social
26%	16%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

PAY

19% +3

pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	32%	(+2)	68%
2	YouTube	15%	(+1)	67%
3	WhatsApp	12%	(+2)	66%

Rank	Brand	For News		For All
4	Twitter	8%	(-)	19%
5	Instagram	7%	(+1)	40%
6	Facebook Messenger	5%	(-1)	40%

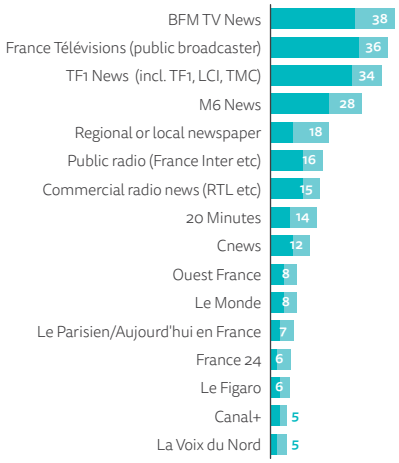
Population	65m
Internet penetration	92%

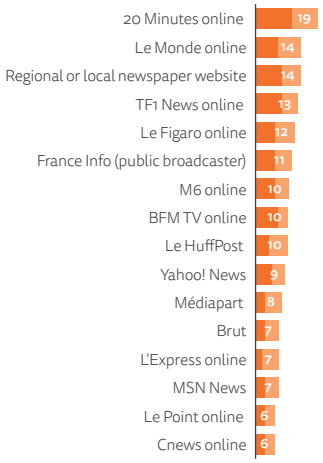
FRANCE

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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





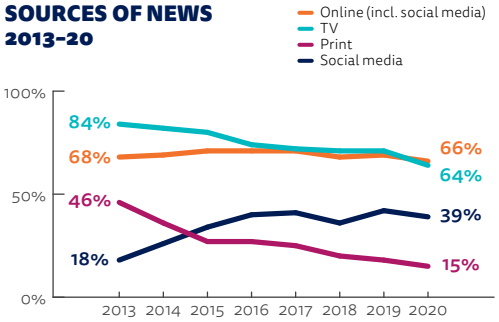
ALSO

Le Média	4%
RT online	3%
Sputnik France	3%
Fdesouche	2%

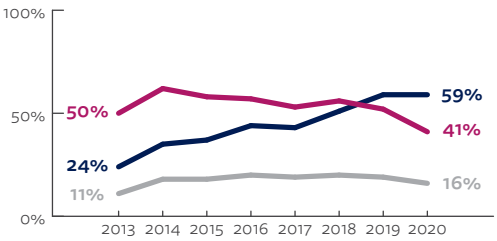
CHANGING MEDIA

TV news reach continues to decline even if people still turn to this medium during moments of national crisis. The Yellow Vests protests boosted use of social media for news in 2019 before falling back. French people are now more likely to access news from a smartphone than a computer.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20



TRUST

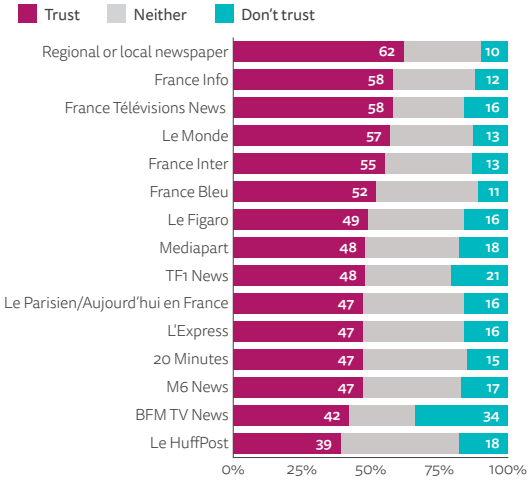
Trust in news in France is amongst the lowest (23%) in Europe – partly affected by the divisions that emerged around the Yellow Vests protests and the media's coverage of it. While public media such as France Télévisions and France Info are most trusted, popular 24-hour channel BFM has by far the highest levels of distrust (34%).

DIFFERENT TYPES OF TRUST

News overall	News I use
23% (-1) 39th/40	34%

News in search	News in social
18%	13%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

10% +1
pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	43%	(-3)	63%
2	YouTube	23%	(-1)	54%
3	Facebook Messenger	12%	(-1)	39%

Rank	Brand	For News		For All
4	Twitter	9%	(-)	16%
5	Instagram	9%	(+1)	27%
6	WhatsApp	9%	(+1)	28%

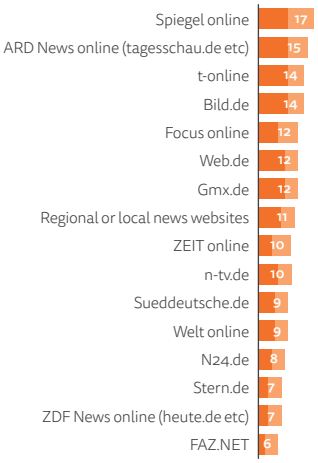
Population	82m
Internet penetration	96%

GERMANY

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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



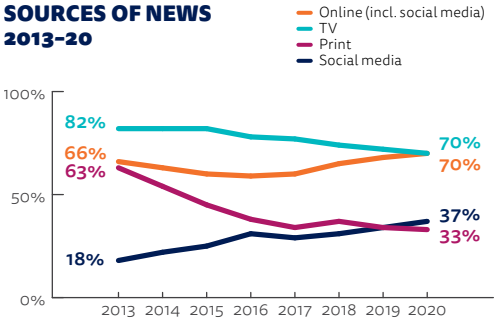
ALSO

Tichys Einblick	4%
Junge Freiheit	3%
Compact Online	2%
PI News	2%
Epoch Times	2%

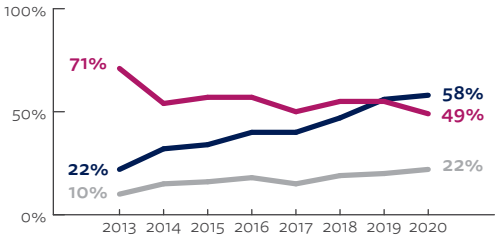
CHANGING MEDIA

Online has caught up with television to become jointly the most widely used source of news in Germany in our January survey – though the COVID-19 lockdown reversed that position in April (see Executive Summary chart). Meanwhile the smartphone has overtaken the computer as the main access point for news.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20



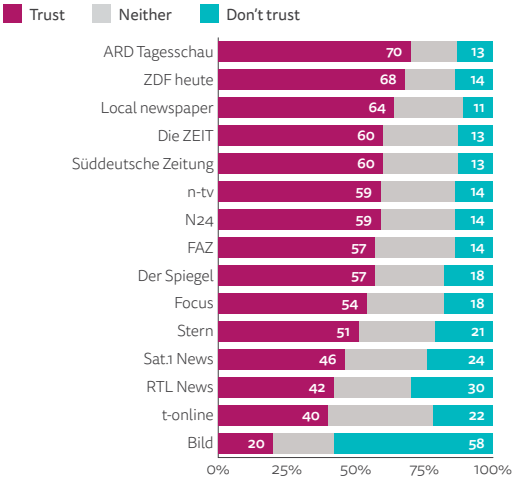
TRUST

Trust in news media decreased further in 2020, though trust in the brands people use themselves remains relatively high. Public media such as ARD and ZDF remain most trusted, along with regional and local newspapers. We observe the highest level of distrust in commercial broadcaster RTL (30%) and tabloid newspaper *Bild* (58%), despite their popularity with audiences.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
45% (-2) =10th/40	**59%**
News in search	***News in social***
24%	**14%**

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

10% +2
pay for
ONLINE NEWS

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	22%	(-)	49%
2	WhatsApp	16%	(-)	69%
3	YouTube	14%	(-5)	55%

Rank	Brand	For News		For All
4	Instagram	6%	(-)	25%
5	Twitter	6%	(+1)	13%
6	Facebook Messenger	4%	(-)	22%

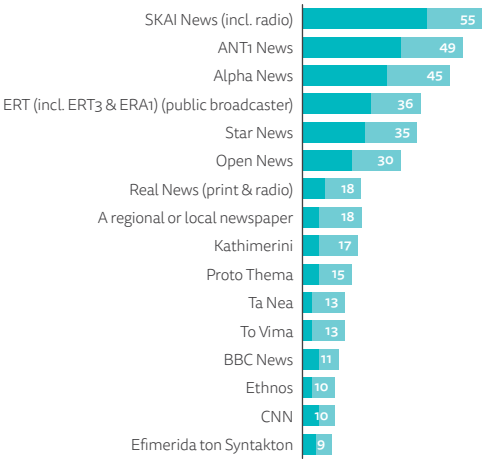
Population	11m
Internet penetration	73%

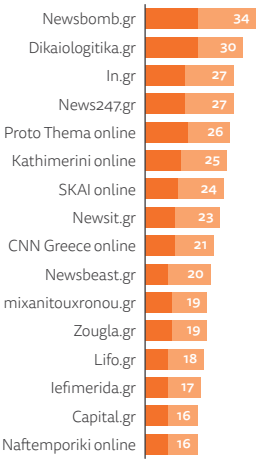
GREECE*

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

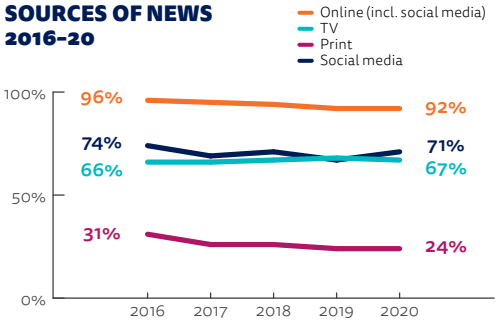




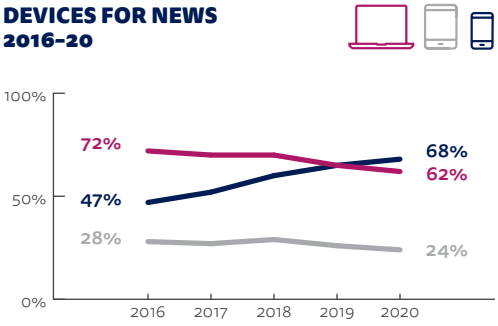
CHANGING MEDIA

The media market in Greece is characterised by online fragmentation, a changing and polarised TV market, a print sector in crisis and one of the highest uses of social media for news. Smartphones are now used to access news more often than computers for the first time.

SOURCES OF NEWS 2016-20



DEVICES FOR NEWS 2016-20



TRUST

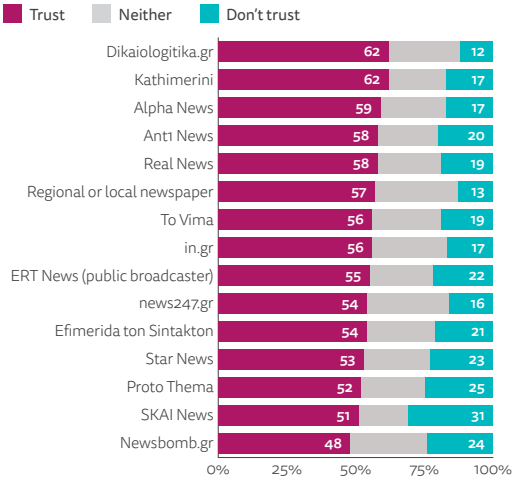
The media remain widely distrusted by Greeks, with few outlets seen as independent from political or business interests. Fewer than a third (30%) trust the news they use themselves – amongst the lowest in our survey. Many of the popular sources such as SKAI News and Newsbomb are also the least trusted.

DIFFERENT TYPES OF TRUST

News overall	News I use
28% (+1) =32nd/40	30%

News in search	News in social
32%	21%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

11% +4
pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

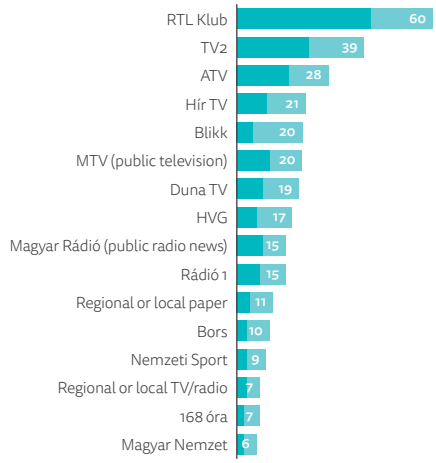
Rank	Brand	For News		For All
1	Facebook	57%	(-1)	78%
2	YouTube	32%	(-4)	77%
3	Facebook Messenger	22%	(-3)	62%
4	Viber	17%	(-)	57%
5	Instagram	16%	(+1)	46%
6	Twitter	13%	(+1)	25%

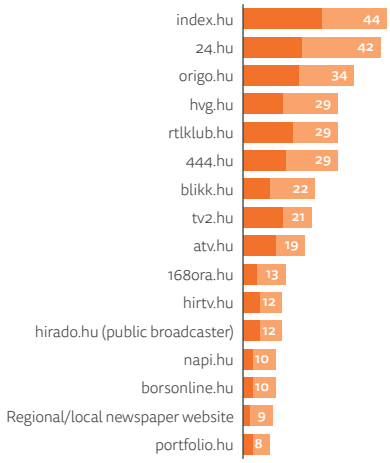
*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

Population 9.7m
Internet penetration 89%

HUNGARY

WEEKLY REACH OFFLINE AND ONLINE

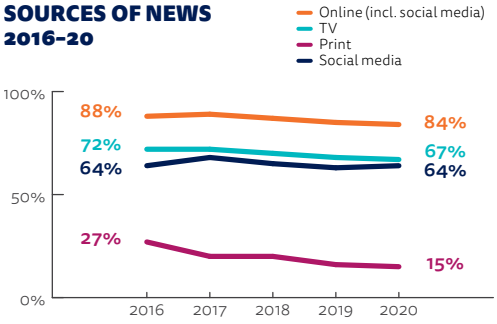




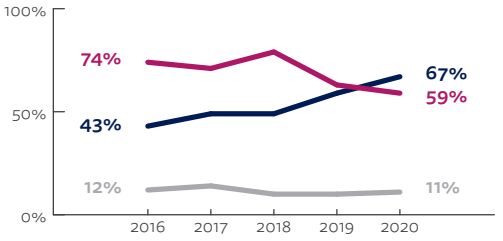
CHANGING MEDIA

Government allies have strengthened their grip on the media market in recent years through distribution of state advertising, control over public service media, and smear campaigns against critical journalists. But independent journalism flourishes online, with social media like Facebook and YouTube also widely used for news.

SOURCES OF NEWS 2016-20



DEVICES FOR NEWS 2016-20*



*2018 figures for computer use were likely overstated due to an error in polling.

TRUST

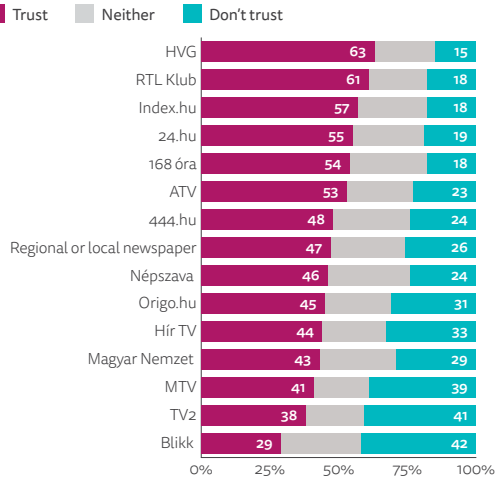
Low trust has become a constant feature of the Hungarian media scene, while accusations of bias, distortion, and disinformation abound. The government often labels critical media outlets 'fake-news'. Despite this, the public places most trust in well-established brands (HVG, RTL Klub, Index.hu), whereas pro-government brands (including the public service broadcaster, MTV) tend to be less trusted.

DIFFERENT TYPES OF TRUST

News overall	News I use
27% (-1) =35th/40	53%

News in search	News in social
39%	25%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	61%	(-1)	82%
2	YouTube	27%	(-2)	73%
3	Facebook Messenger	13%	(-3)	67%

Rank	Brand	For News		For All
4	Instagram	7%	(-)	31%
5	Viber	5%	(+1)	29%
6	Twitter	4%	(-)	13%

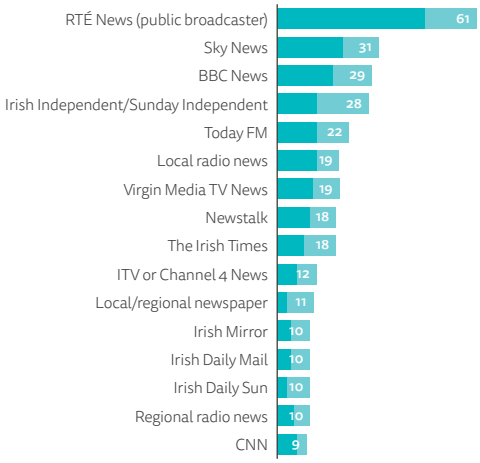
Population 4.8m
Internet penetration 92%

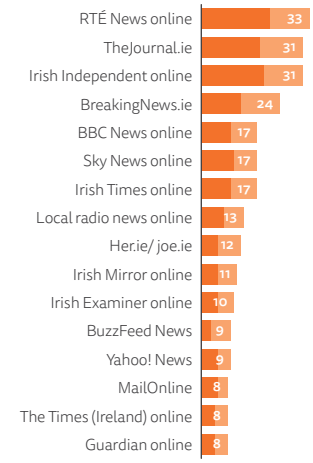
IRELAND

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

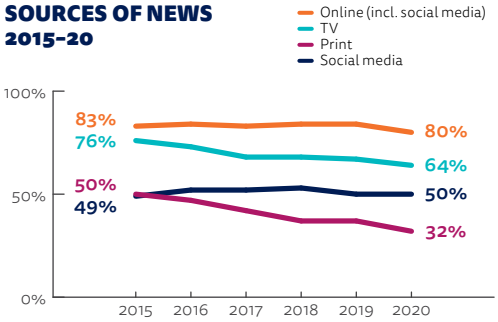




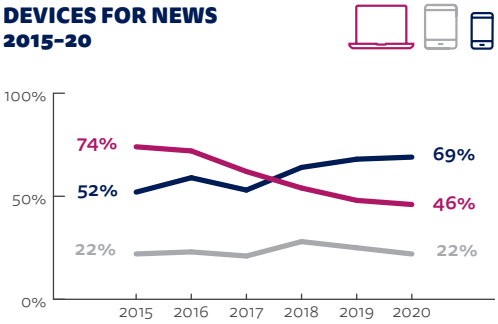
CHANGING MEDIA

Traditional sources of news such as television and print appear to be in structural decline, though industry data show television audiences increasing sharply during the COVID-19 lockdown. In line with international trends, the use of smartphones has continued to increase over the past six years rising to 69%.

SOURCES OF NEWS 2015-20



DEVICES FOR NEWS 2015-20



TRUST

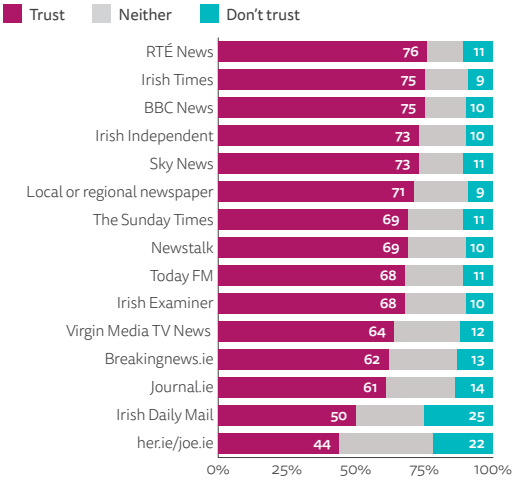
Irish consumers' levels of trust in news has remained stable over the past year, bucking international trends. In both 2019 and 2020 almost half (48%) agreed they can trust most news most of the time. The public service broadcaster RTÉ remains the most trusted news brand, closely followed by the *Irish Times* and the *Irish Independent*, now under foreign ownership.

DIFFERENT TYPES OF TRUST

News overall	News I use
48% (-) =7th/40	52%

News in search	News in social
31%	18%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

12% pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

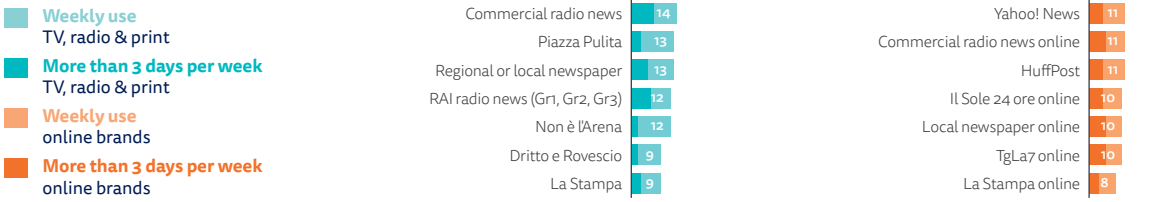
Rank	Brand	For News	For All
1	Facebook	39% (+2)	65%
2	YouTube	22% (+5)	62%
3	WhatsApp	19% (+4)	62%

Rank	Brand	For News	For All
4	Twitter	14% (+2)	24%
5	Instagram	11% (+4)	35%
6	Facebook Messenger	9% (-)	44%

Population 59m
Internet penetration 93%

ITALY

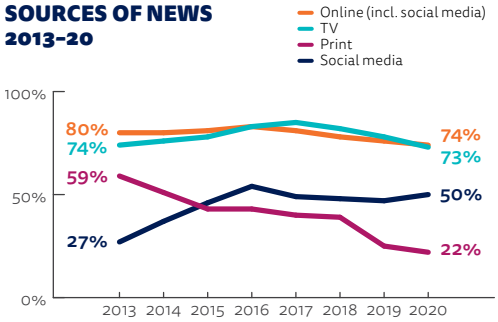
WEEKLY REACH OFFLINE AND ONLINE



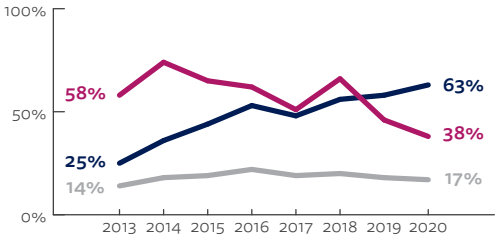
CHANGING MEDIA

Newspaper readership continues to fall steadily while television news viewership has been more stable than in many other countries. The smartphone is now the main device used to get online news with around two-thirds (63%) of our sample using it for news each week.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20*



*2018 figures for computer use were likely overstated due to an error in polling.

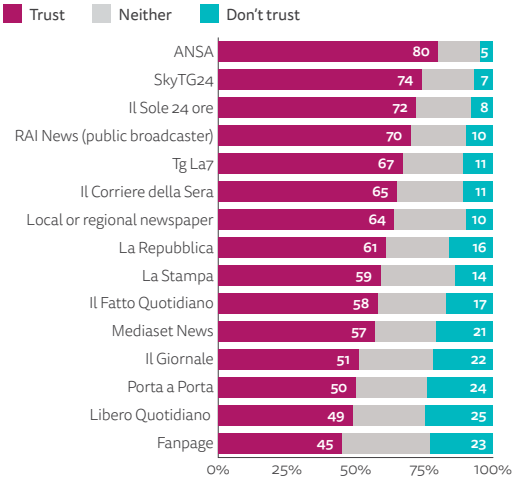
TRUST

Trust in news is particularly low. This long-standing trend is mainly due to the partisan nature of Italian journalism and to the strong influence of political and business interests on news organisations. Brands that are most trusted are generally those that are known for lower levels of political partisanship. Least trusted is the popular digital-born website Fanpage.

DIFFERENT TYPES OF TRUST

News overall	News I use
29% (-11) =30th/40	38%
News in search	**News in social**
30%	19%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	56%	(+2)	75%
2	WhatsApp	29%	(+2)	82%
3	YouTube	24%	(-1)	67%
4	Instagram	17%	(+4)	48%
5	Facebook Messenger	9%	(+1)	41%
6	Twitter	9%	(+1)	18%

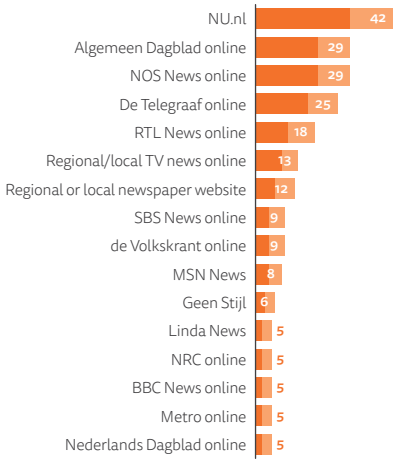
Population	17m
Internet penetration	96%

NETHERLANDS

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

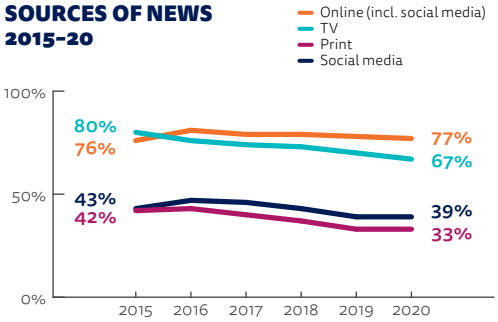
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



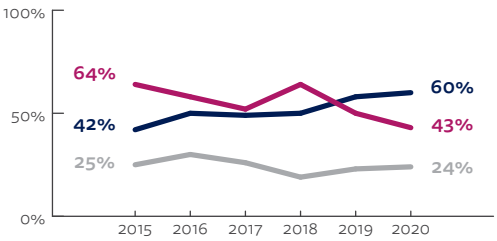
CHANGING MEDIA

Traditional forms of news such as TV and print have become less important in the last six years (pre-coronavirus) while online news has remained broadly flat. The smartphone is now the most popular device for digital news while the tablet is more important than in many other countries.

SOURCES OF NEWS 2015-20



DEVICES FOR NEWS 2015-20*



*2018 computer figures were likely overstated due to an error in data collection.

TRUST

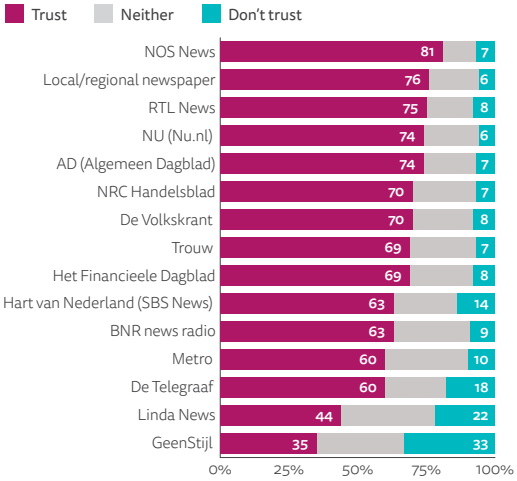
Trust is still relatively high in the Netherlands (4th place) by international standards with more than six in ten (61%) trusting the sources they use themselves. Public news broadcaster NOS leads the brand trust scores along with regional and local papers. Some tabloids and partisan brands have lower trust scores.

DIFFERENT TYPES OF TRUST

News overall	News I use
52% (-1) 4th/40	61%

News in search	News in social
31%	20%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

PAY

14% +3

pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

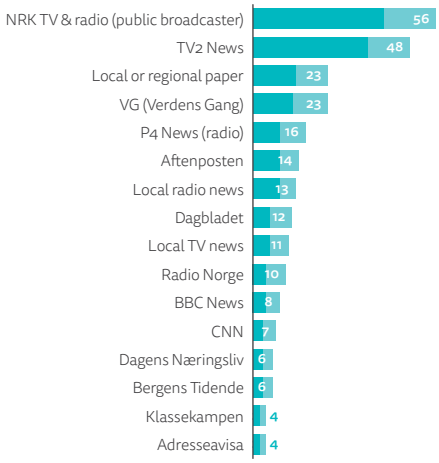
Rank	Brand	For News		For All
1	Facebook	28%	(-)	60%
2	WhatsApp	20%	(+2)	73%
3	YouTube	15%	(+1)	51%

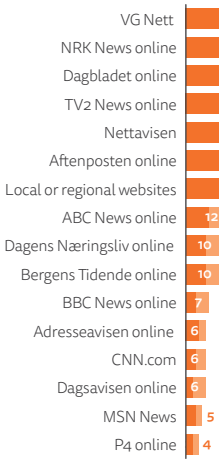
Rank	Brand	For News		For All
4	Instagram	9%	(+3)	32%
5	Twitter	7%	(-)	14%
6	Facebook Messenger	5%	(+1)	28%

Population 5.4m
Internet penetration 98%

NORWAY

WEEKLY REACH OFFLINE AND ONLINE





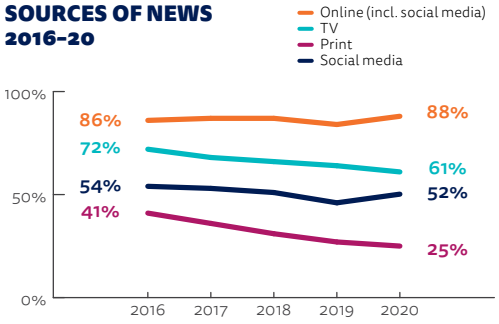
ALSO

Resett	8%
Document	7%
Human Rights Service	5%
Radikalportal	1%

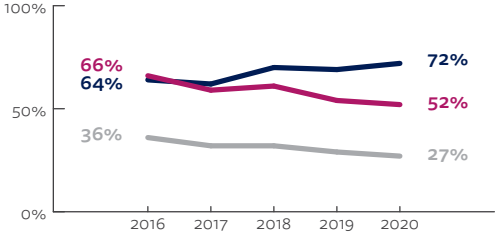
CHANGING MEDIA

The vast majority of Norwegians (88%) use online news weekly, one of the highest figures in our survey, while traditional news sources – print and television – are in decline. Online patterns are shifting from computers to smartphones, which are now by far the number one device for news in Norway.

SOURCES OF NEWS 2016-20



DEVICES FOR NEWS 2016-20



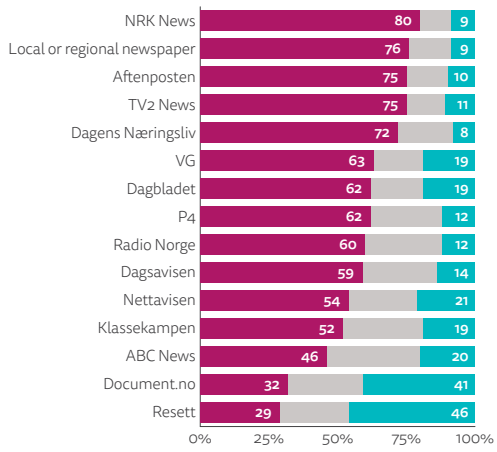
TRUST

Trust in news remains lower than some other Nordic countries though still above international averages. Trust remains strong in the main media brands including public broadcaster NRK, commercial channel TV2, and broadsheet and tabloid newspapers and their online sites. Partisan and alternative brands like Document and Resett are least trusted.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
45% (-1) =10th/40	**58%**
News in search	***News in social***
28%	**17%**

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	37%	(-8)	78%
2	Facebook Messenger	13%	(-1)	63%
3	YouTube	13%	(-1)	58%

Rank	Brand	For News		For All
4	Snapchat	10%	(-)	50%
5	Instagram	8%	(-2)	46%
6	Twitter	7%	(+1)	17%

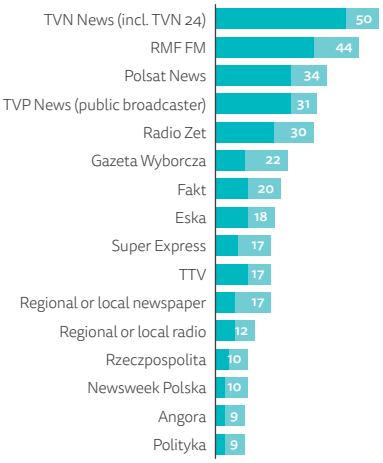
Population	38m
Internet penetration	78%

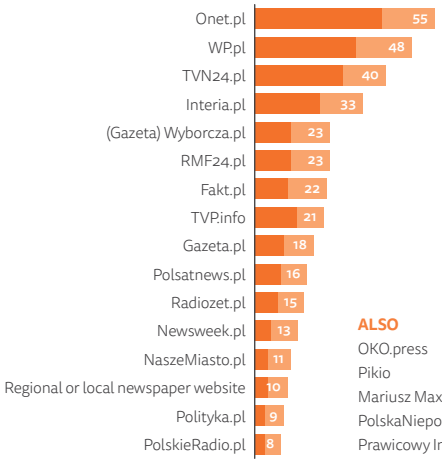
POLAND

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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





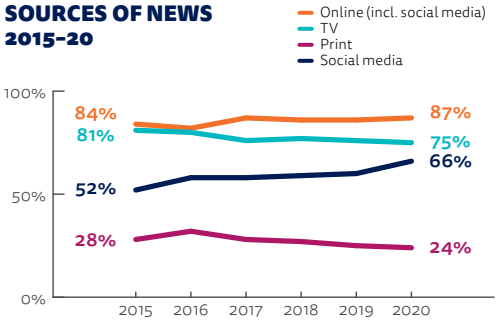
ALSO

OKO.press	13%
Pikio	9%
Mariusz Max Kolonko	7%
PolskaNiepodlegla	5%
Prawicowy Internet	4%

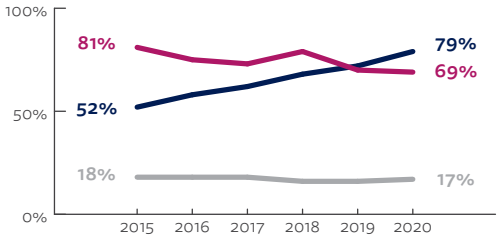
CHANGING MEDIA

Online and television remain the most important sources of news, with popular portals like Onet and WP a defining part of the Polish media landscape along with soaring social media use (66% use for news). The smartphone has overtaken the computer as a way of accessing news for the first time.

SOURCES OF NEWS 2015-20



DEVICES FOR NEWS 2015-20*



*2018 figures for computer use were likely overstated due to an error in polling.

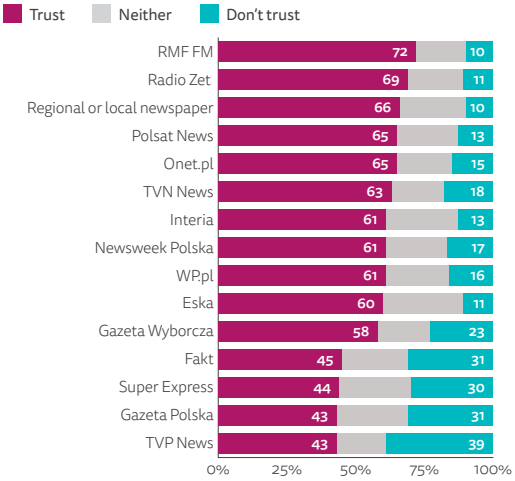
TRUST

Trust in news has fallen by three percentage points this year but people have more trust in the brands they use themselves. Independent media tend to score higher in terms of trust than the public service broadcaster TVP which is often seen as acting in the interests of the ruling party.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
45% (-3) =10th/40	**55%**
News in search	***News in social***
46%	**37%**

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

20% +4
pay for
ONLINE NEWS

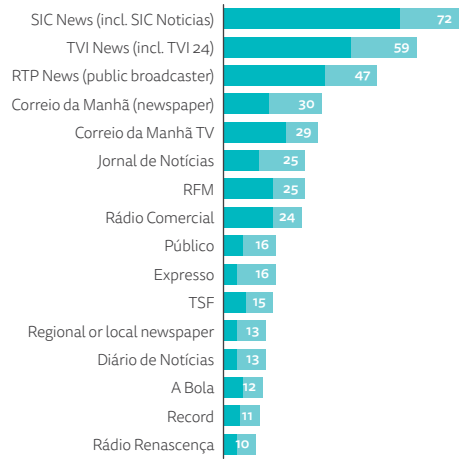
TOP SOCIAL MEDIA AND MESSAGING

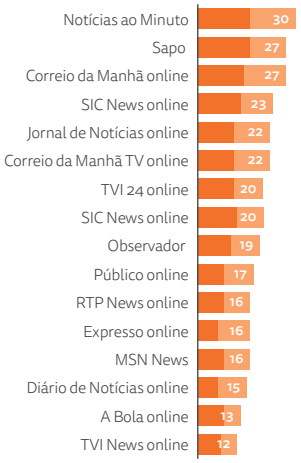
Rank	Brand	For News	For All
1	Facebook	65% (+4)	83%
2	YouTube	36% (-3)	75%
3	Facebook Messenger	24% (+2)	63%
4	Instagram	12% (+3)	34%
5	Twitter	11% (+1)	21%
6	WhatsApp	10% (+1)	31%

Population	10m
Internet penetration	78%

PORTUGAL

WEEKLY REACH OFFLINE AND ONLINE

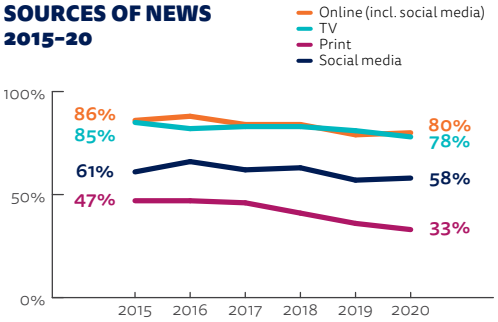




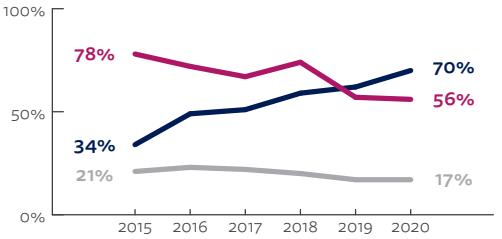
CHANGING MEDIA

Television is increasingly challenged by online and social media as the most important source of news while print sales continue to fall – damaging revenues and the long-term sustainability of the sector. Smartphones have overtaken computers and laptops as the main access points for digital news.

SOURCES OF NEWS 2015-20



DEVICES FOR NEWS 2015-20*



*2018 figures for computer use were likely overstated due to an error in polling.

TRUST

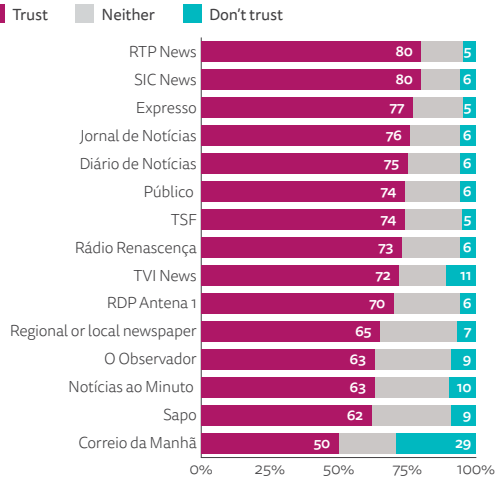
Despite being equal first in our survey, trust scores show a slow but steady decline. Last year's parliamentary election campaign led to a right-wing populist MP taking up a seat – a historic event in Portuguese democracy. In an increasingly polarised environment, journalists face mounting pressure to fact-check political statements and not fall prey to attention-grabbing tactics from populists.

DIFFERENT TYPES OF TRUST

News overall	News I use
56% (-2) =1st/40	59%

News in search	News in social
43%	28%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	50%	(-3)	77%
2	YouTube	24%	(-)	68%
3	WhatsApp	18%	(+3)	59%

Rank	Brand	For News		For All
4	Facebook Messenger	16%	(-4)	58%
5	Instagram	14%	(+2)	47%
6	Twitter	8%	(+3)	15%

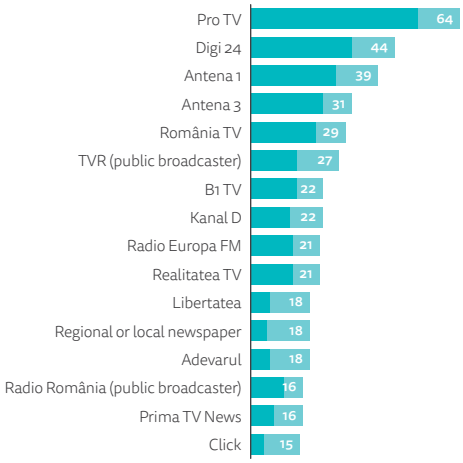
Population 19m
Internet penetration 74%

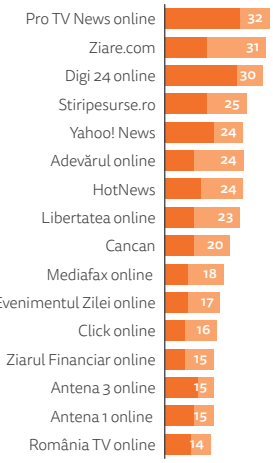
ROMANIA*

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

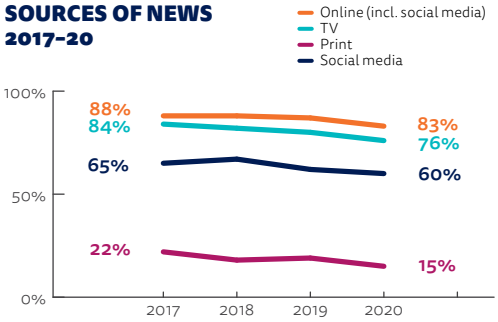




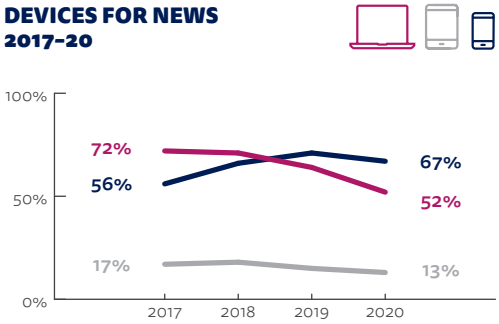
CHANGING MEDIA

TV and online remain the most important news sources in Romania, with printed newspaper and magazine consumption (15%) amongst the lowest in our survey. The smartphone has extended its lead over computers as the main device for accessing digital news.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

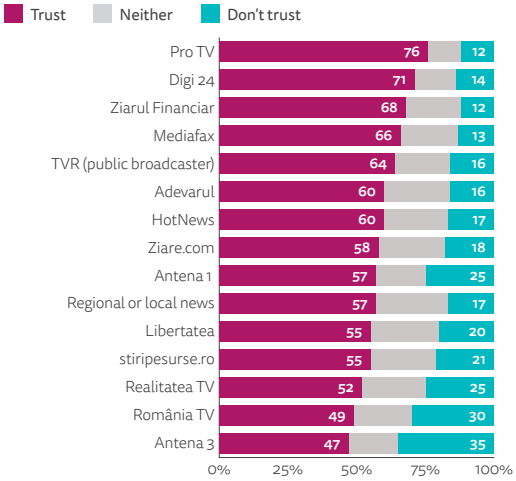
Polarisation and political attacks on journalists are part of the reason for relatively low trust in the news. The most trusted brands try to offer a balanced picture on politics while more partisan brands tend to rate lower along with mass market media covering scandal, celebrities and sports.

DIFFERENT TYPES OF TRUST

News overall	News I use
38% (+3) =19th/40	44%

News in search	News in social
41%	31%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

16% +6
pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

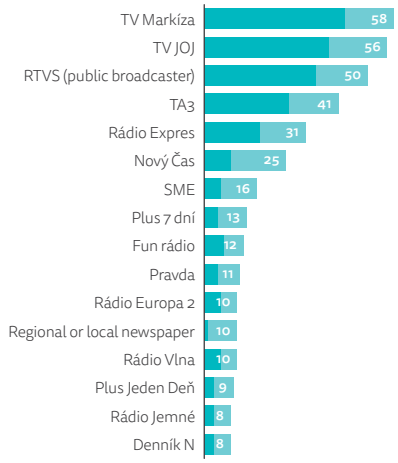
Rank	Brand	For News		For All
1	Facebook	67%	(-1)	82%
2	YouTube	32%	(-)	72%
3	WhatsApp	21%	(-2)	63%
4	Facebook Messenger	20%	(-2)	56%
5	Instagram	12%	(+2)	35%
6	LinkedIn	6%	(-1)	19%

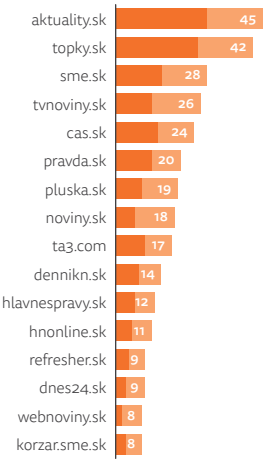
*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

Population 5.5m
Internet penetration 85%

SLOVAKIA

WEEKLY REACH OFFLINE AND ONLINE

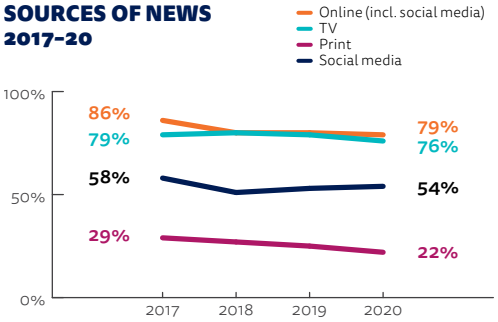




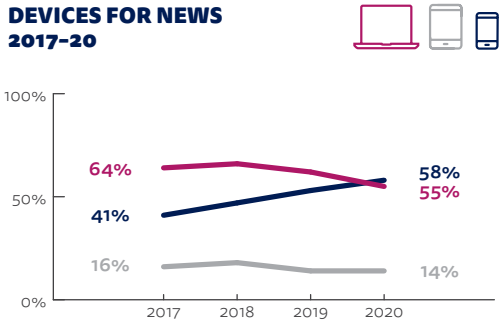
CHANGING MEDIA

The ongoing trial of those accused of the murder of investigative journalist Ján Kuciak has continued to grip the nation with extensive coverage via top news sources. Smartphones (58%) have overtaken computers and laptops (55%) for the first time this year as the main way of accessing digital news.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

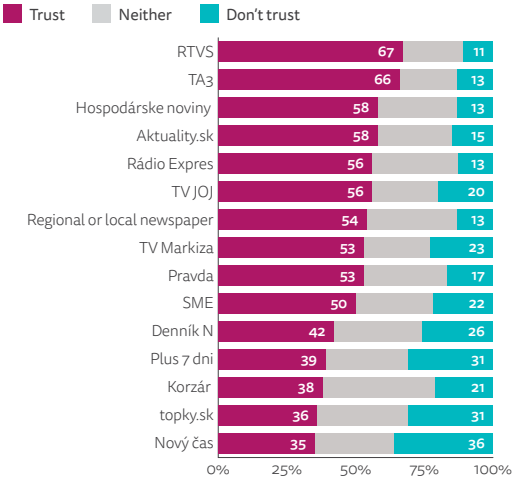
Trust in news overall dropped significantly from an already low level, reflecting the success of sustained critique of the media 'mainstream' by partisan brands and the difficulty of countering this critique without appearing censorial. Public service broadcaster RTVS overtook rolling news channel TA3 as the most trusted brand this year.

DIFFERENT TYPES OF TRUST

News overall	News I use
28% (-5) =32nd/40	40%

News in search	News in social
29%	17%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

12% +4
pay for
ONLINE NEWS

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	54%	(-1)	72%
2	YouTube	24%	(-2)	63%
3	Facebook Messenger	17%	(-1)	51%

Rank	Brand	For News		For All
4	Instagram	8%	(-)	25%
5	Pokec.sk	6%	(-1)	13%
6	WhatsApp	5%	(-)	23%

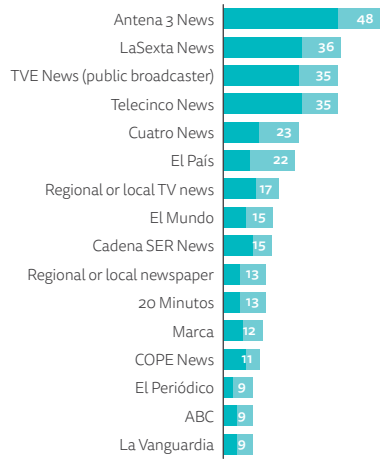
Population	46m
Internet penetration	93%

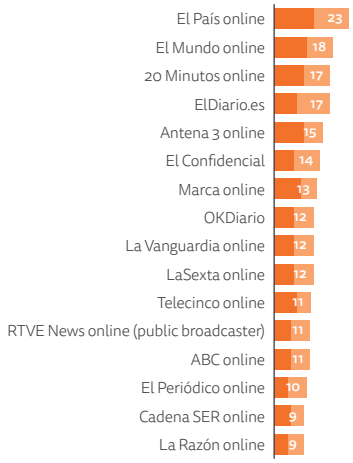
SPAIN

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

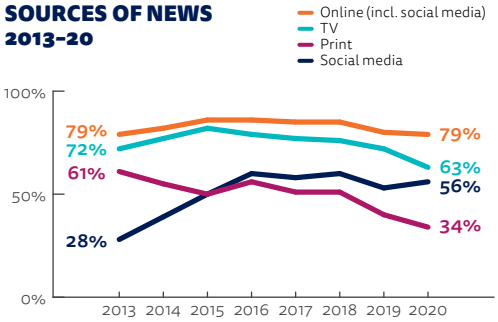




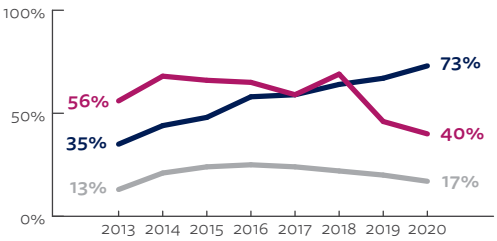
CHANGING MEDIA

The steep decline in print sales has pushed more brands to start charging online including *El Mundo* and many regional papers. *El País* delayed its metered paywall until May due to the COVID-19 pandemic. Eldiario.es jumped to 53,000 paying members after it launched an SOS call in face of a decline in ad sales.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20*



*2018 figures for computer use were likely overstated due to an error in polling.

TRUST

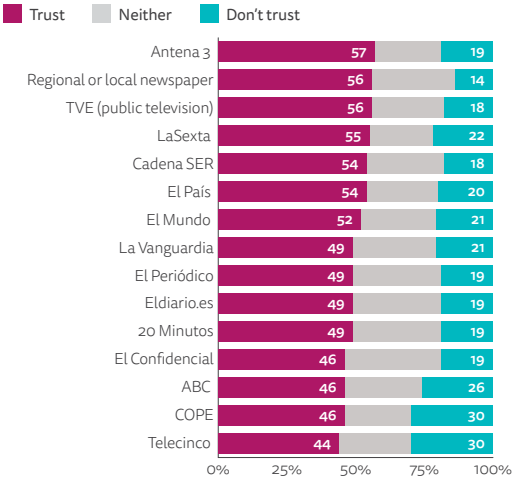
Trust has declined further as coverage of elections in April, May and November 2019 dominated the news, along with the polarising topic of a Supreme Court ruling about Catalonia separatist leaders and its turbulent aftermath. Enric Hernández, former editor-in-chief of *El Periódico*, was appointed head of news at RTVE amid ongoing interim leadership at the public broadcaster.

DIFFERENT TYPES OF TRUST

News overall	News I use
36% (-7) =23rd/40	42%

News in search	News in social
32%	23%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

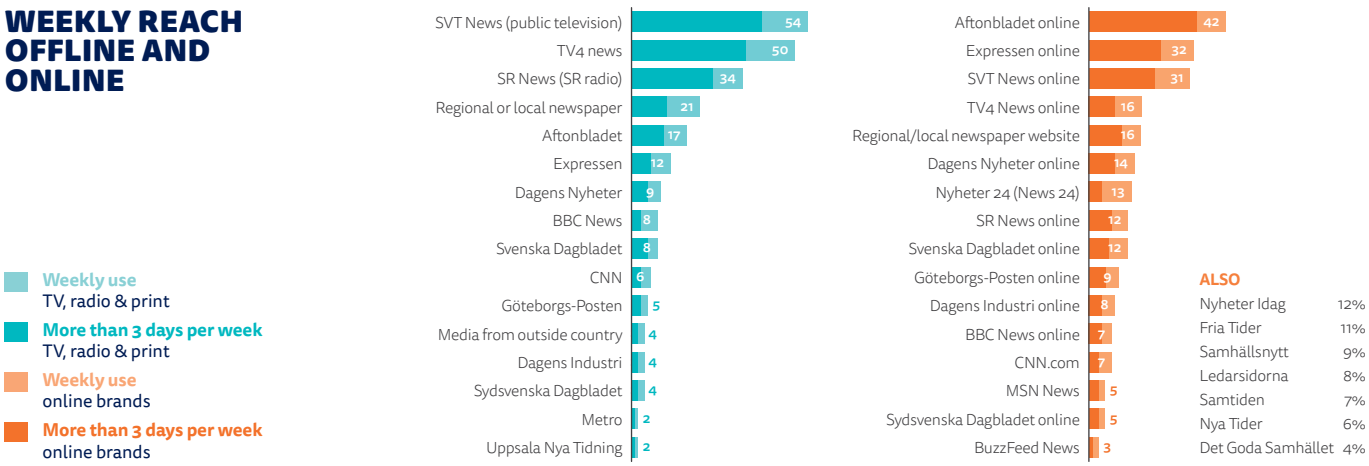
TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	44%	(-3)	69%
2	WhatsApp	34%	(-2)	81%
3	YouTube	25%	(-1)	69%
4	Twitter	20%	(+4)	35%
5	Instagram	17%	(+5)	47%
6	Facebook Messenger	6%	(-1)	26%

Population 10m
Internet penetration 96%

SWEDEN

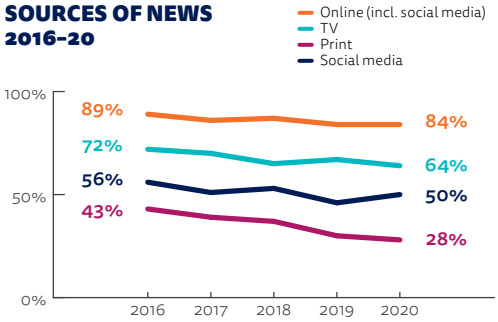
WEEKLY REACH OFFLINE AND ONLINE



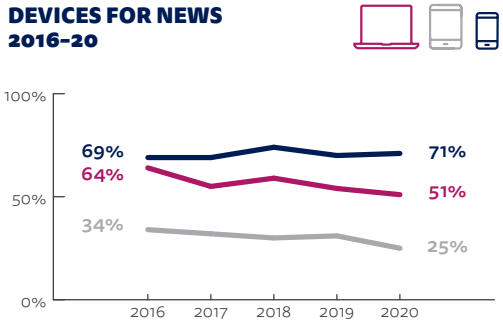
CHANGING MEDIA

TV and online news remain the most popular sources of news while print has dropped by 15 percentage points in the last five years. Domestic newspapers have lost much of their advertising revenue, with many hoping that increasing digital subscription will make up some of the gap.

SOURCES OF NEWS 2016-20



DEVICES FOR NEWS 2016-20



TRUST

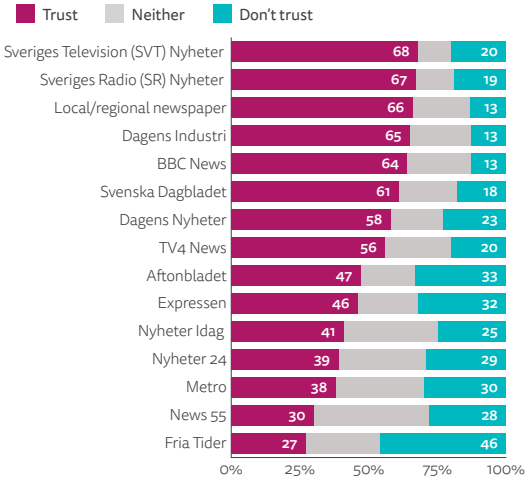
Around four out of ten Swedes express a general trust in the news, similar to previous years, though trust is much higher for the news sources people regularly turn to. Public broadcasters are the most trusted bands along with local newspapers while partisan brands and tabloids have the highest level of mistrust.

DIFFERENT TYPES OF TRUST

News overall	News I use
38% (-1) =19th/40	47%

News in search	News in social
25%	13%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

27% pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	32%	(-)	70%
2	YouTube	16%	(+2)	62%
3	Instagram	10%	(+1)	49%

Rank	Brand	For News		For All
4	Facebook Messenger	9%	(-1)	52%
5	Twitter	8%	(-)	17%
6	WhatsApp	3%	(-)	20%

Population	8.6m
Internet penetration	94%

SWITZERLAND

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

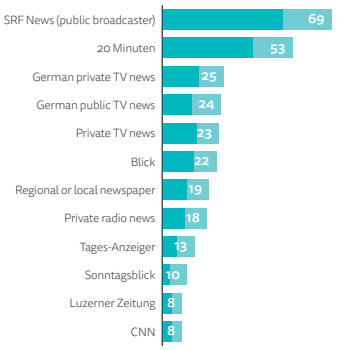
- **Weekly use** TV, radio & print
- **More than 3 days per week** TV, radio & print
- **Weekly use** online brands
- **More than 3 days per week** online brands

13% (+2) pay for **ONLINE NEWS**

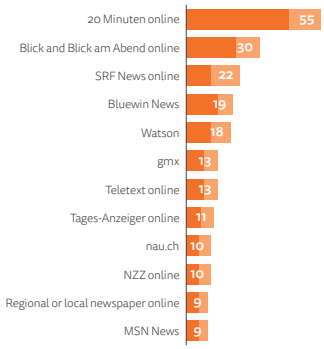
French 17% (+2) | German 12% (+3)

32% listened to **PODCASTS** in the last month

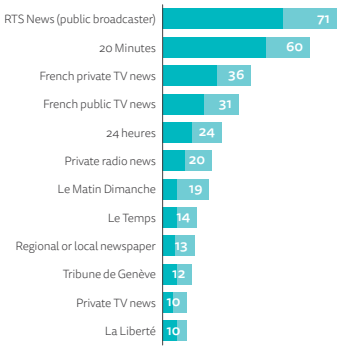
TV, RADIO AND PRINT (GERMAN)



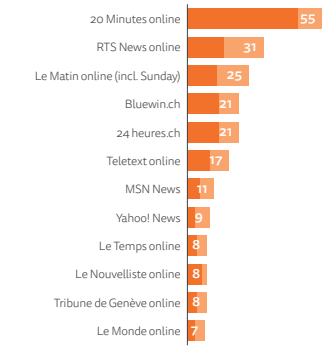
ONLINE (GERMAN)



TV, RADIO AND PRINT (FRENCH)



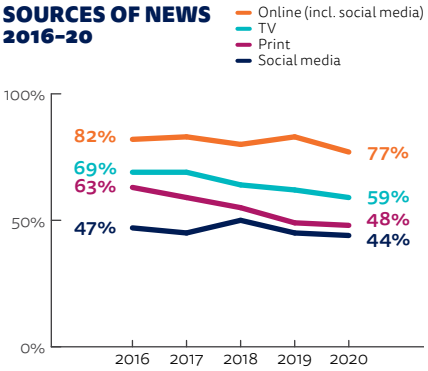
ONLINE (FRENCH)



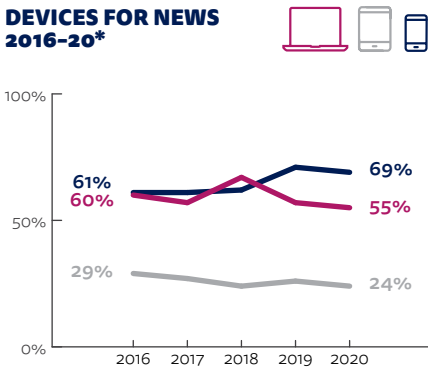
DIFFERENT TYPES OF TRUST

News overall	*News I use*
44% (-2) =14th/40	**52%**
French 37%	French 47%
German 46%	German 55%
News in search	***News in social***
29%	**19%**
French 26%	French 15%
German 30%	German 20%

SOURCES OF NEWS 2016-20



DEVICES FOR NEWS 2016-20*

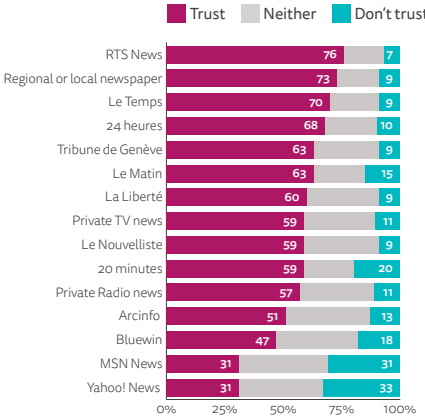


*2018 figures for computer use were likely overstated due to an error in polling.

TOP SOCIAL MEDIA AND MESSAGING

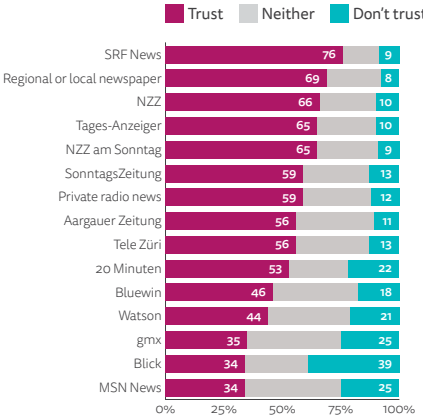
Rank	Brand	For News		For All
1	Facebook	30%	(-2)	57%
2	WhatsApp	26%	(-)	73%
3	YouTube	24%	(-2)	61%
4	Instagram	11%	(+1)	33%
5	Facebook Messenger	9%	(+1)	31%
6	LinkedIn	6%	(-)	18%

BRAND TRUST SCORES (FRENCH)



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

BRAND TRUST SCORES (GERMAN)

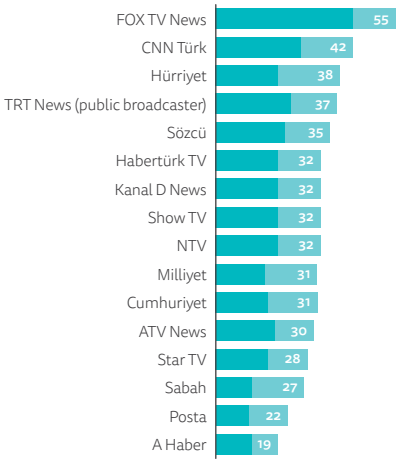


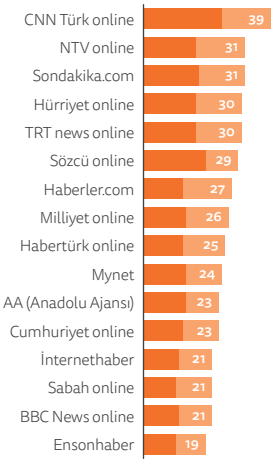
Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

Population	83m
Internet penetration	83%

TURKEY*

WEEKLY REACH OFFLINE AND ONLINE

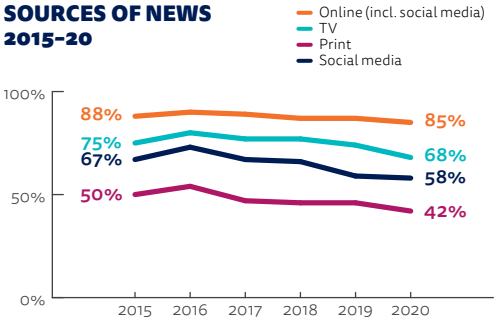




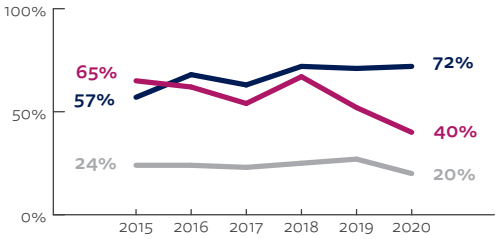
CHANGING MEDIA

Although online news is widely used by our urban-based sample, across Turkey as a whole television remains the most important source of news. Print newspapers also continue to be well read by international standards, though use is declining. Smartphones are now easily the most important device for accessing online news.

SOURCES OF NEWS 2015-20



DEVICES FOR NEWS 2015-20*



*2018 figures for computer use were likely overstated due to an error in polling.

TRUST

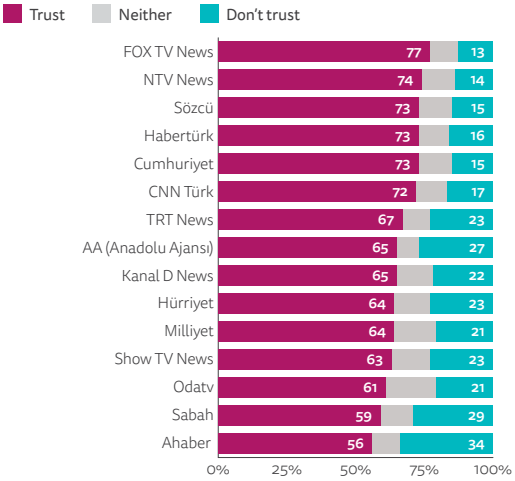
Overall levels of trust in the news increased by nine percentage points although there doesn't seem to be any obvious explanation for such a change. TV news sources like Fox and NTV – along with critical voices like Cumhuriyet and Sözcü – tend to be most highly rated for trust. Pro-government media tend to be trusted less, though they have higher scores from those that use them regularly.

DIFFERENT TYPES OF TRUST

News overall	News I use
55% (+9) 3rd/40	61%

News in search	News in social
57%	51%

BRAND TRUST SCORES



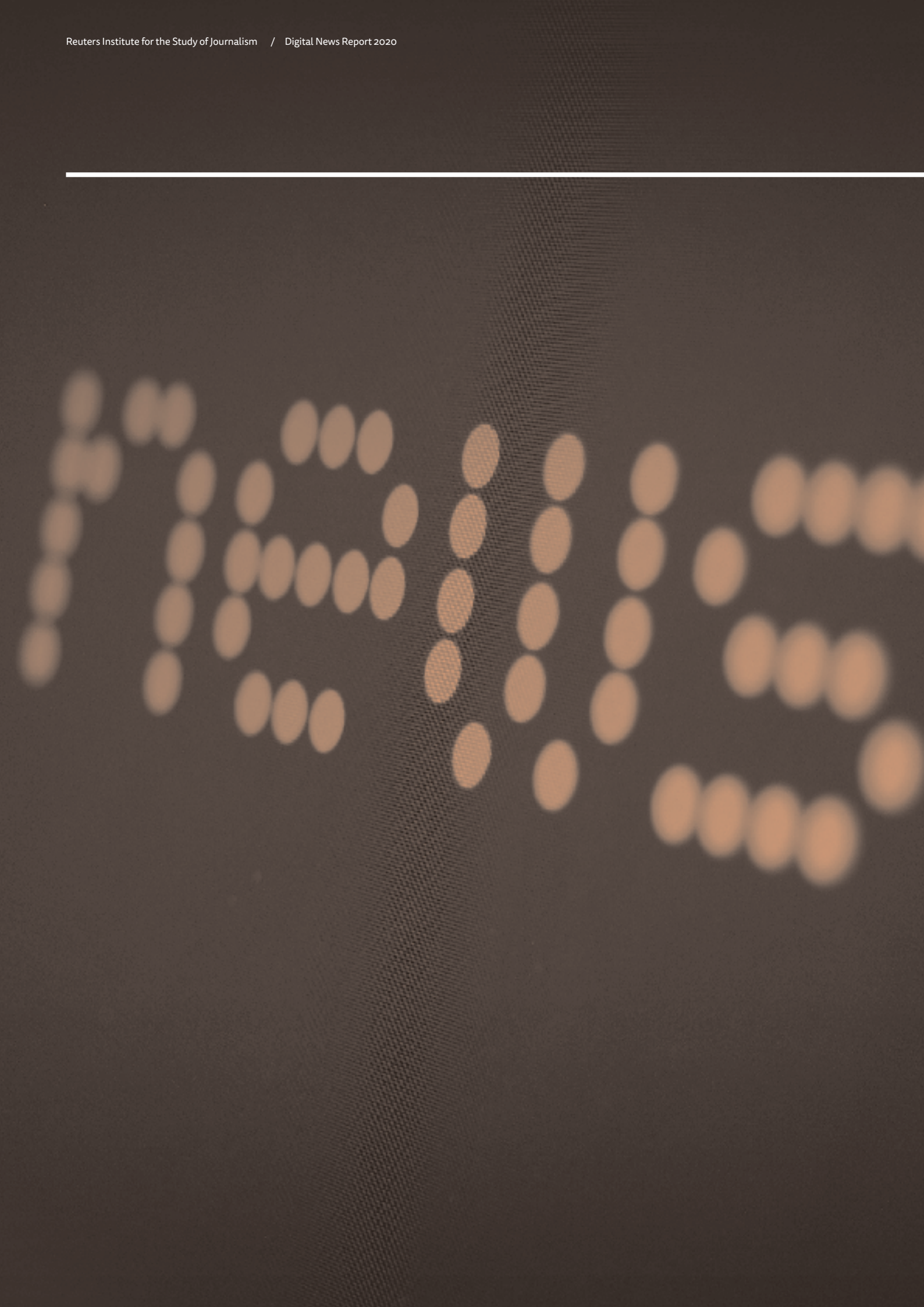
Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

57%
SHARE NEWS by social media, email, or messaging

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	49%	(+2)	67%
2	YouTube	45%	(-4)	71%
3	Instagram	41%	(+8)	66%
4	WhatsApp	31%	(-2)	67%
5	Twitter	30%	(-3)	44%
6	Facebook Messenger	10%	(-)	32%

*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.



SECTION 3

Country and Market Data **Americas**

AMERICAS		
3.25	United States	88
3.26	Argentina	89
3.27	Brazil	90
3.28	Canada	91
3.29	Chile	92
3.30	Mexico	93

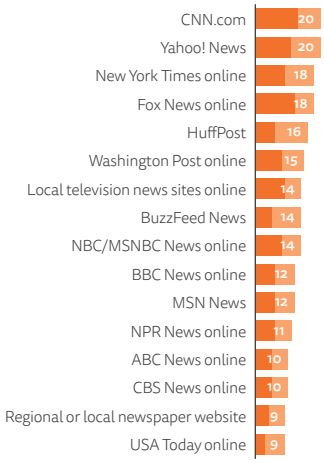
Population	329m
Internet penetration	89%

UNITED STATES

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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



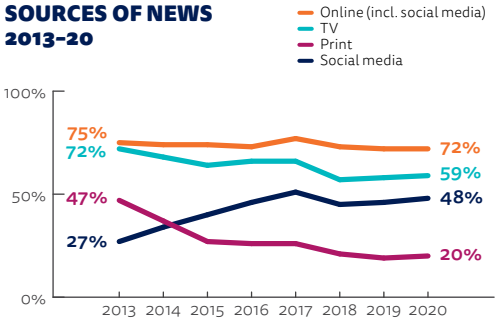
ALSO

Breitbart	7%
The Blaze	6%
The Daily Caller	5%
Occupy Democrats	4%
Info Wars	3%

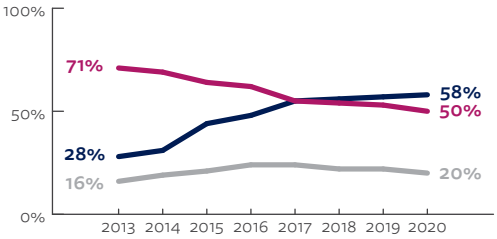
CHANGING MEDIA

The bump in news consumption is clearly visible in 2017 after the election of Donald Trump and we know that the COVID-19 lockdowns (not shown on this chart) also caused TV and online traffic to surge for a time. Meanwhile the smartphone (58%) has overtaken computers and laptops (50%) in terms of weekly news.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20



TRUST

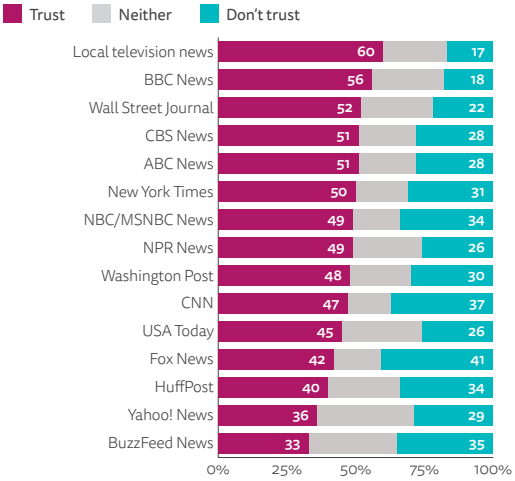
The climate of heightened hostility towards much of the media under Donald Trump shows no signs of abating as attention turns to the 2020 election. The relentless attacks and polarised politics appear to be exacerbating already low levels of media trust. Some of the most strongly distrusted news brands (Fox/CNN) are also the most viewed on television and online.

DIFFERENT TYPES OF TRUST

News overall	News I use
29% (-3) =30th/40	45%

News in search	News in social
22%	14%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

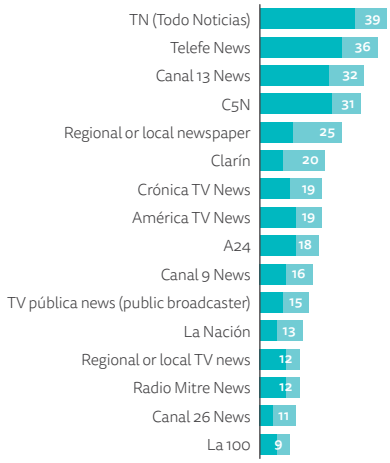
Rank	Brand	For News		For All
1	Facebook	35%	(-4)	63%
2	YouTube	24%	(+4)	61%
3	Twitter	17%	(+2)	29%

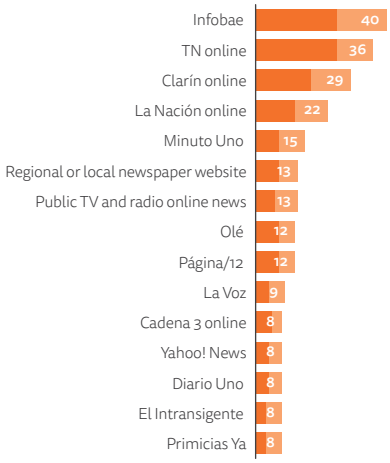
Rank	Brand	For News		For All
4	Facebook Messenger	9%	(-)	39%
5	Instagram	8%	(+1)	30%
6	WhatsApp	4%	(-)	13%

Population 45m
Internet penetration 93%

ARGENTINA*

WEEKLY REACH OFFLINE AND ONLINE

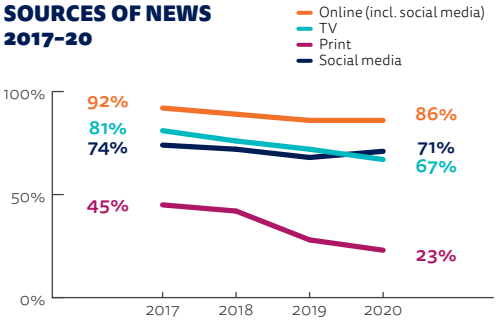




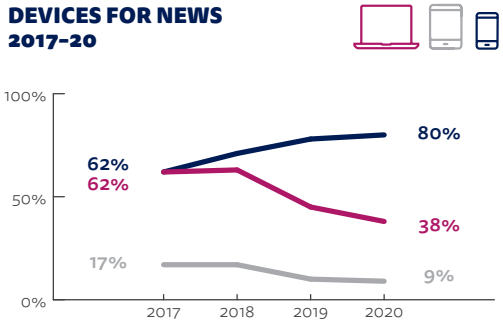
CHANGING MEDIA

Social media have overtaken TV news amongst our online sample for the first time, while weekly print consumption has fallen from 45% to just 23% over the last three years. Eight out of ten (80%) respondents say they now use the smartphone to access news each week.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

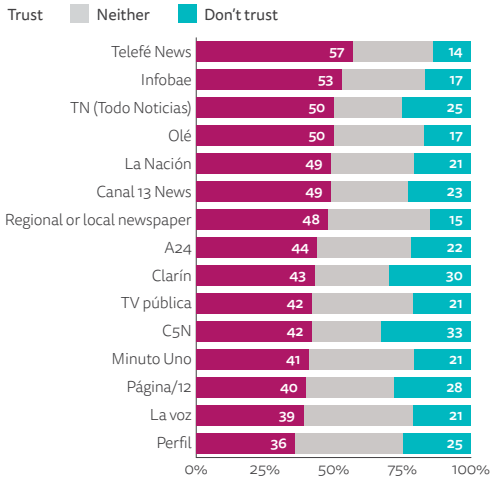
Trust in media has significantly decreased across all media categories: only one-third of respondents trusts news overall, down from 39% in 2019. Trust in news I use is also lower, at 44%, compared to 47% a year earlier. High levels of political polarisation have affected the media industry in Argentina, with many well-known brands attracting strong levels of distrust.

DIFFERENT TYPES OF TRUST

News overall	News I use
33% (-6) =25th/40	44%

News in search	News in social
36%	28%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	65%	(+2)	82%
2	WhatsApp	38%	(-1)	83%
3	YouTube	26%	(+1)	71%
4	Instagram	23%	(+5)	55%
5	Twitter	14%	(-1)	22%
6	Facebook Messenger	10%	(-1)	38%

*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

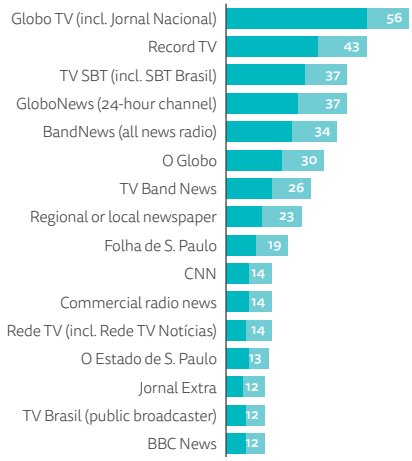
Population	211m
Internet penetration	71%

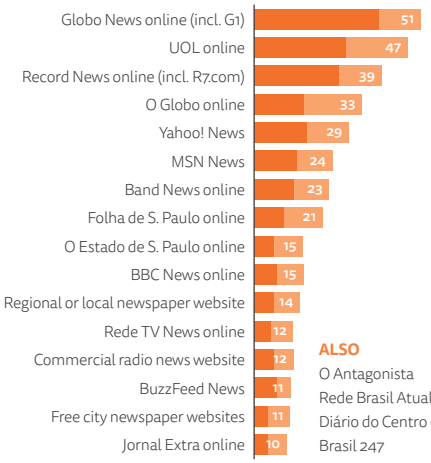
BRAZIL*

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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





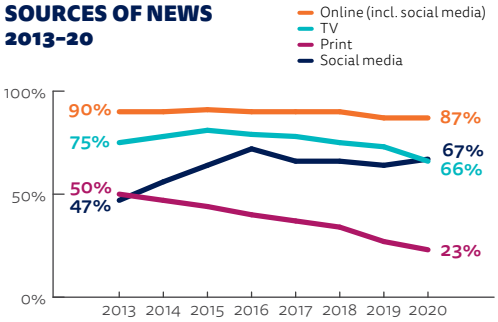
ALSO

O Antagonista	22%
Rede Brasil Atual	16%
Diário do Centro do Mundo	11%
Brasil 247	10%

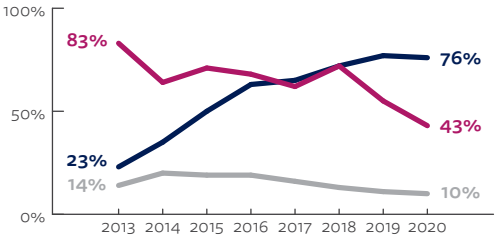
CHANGING MEDIA

For the first time since the survey started, social media overtook television in terms of media consumption for news. Smartphone news use is stable, while the use of computers declined. Print readership has halved since 2013 and the COVID-19 crisis is likely to hit the sector hard.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20*



*2018 figures for computer use were likely overstated due to an error in polling.

TRUST

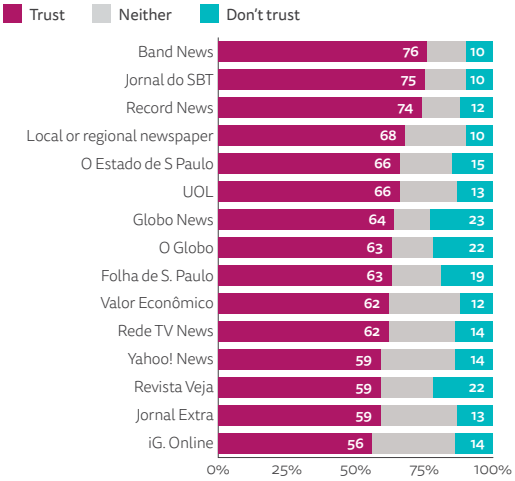
Trust in news overall improved slightly after a significant contraction last year amid an atmosphere of political polarisation following the election of far-right president Jair Bolsonaro in 2018. Tensions between the president and the press remain high, with a recent National Federation of Journalists (Fenaj) report showing that he made 116 verbal attacks on journalists last year.

DIFFERENT TYPES OF TRUST

News overall	News I use
51% (+3) 5th/40	54%

News in search	News in social
53%	38%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	54%	(-)	76%
2	WhatsApp	48%	(-5)	83%
3	YouTube	45%	(+3)	82%

Rank	Brand	For News		For All
4	Instagram	30%	(+4)	61%
5	Twitter	17%	(+2)	32%
6	Facebook Messenger	13%	(-2)	44%

*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

Population 37m
Internet penetration 93%

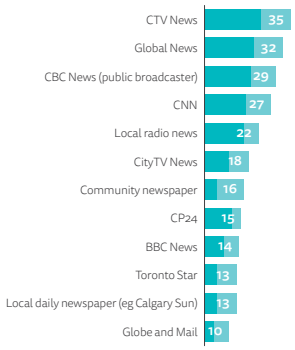
CANADA

WEEKLY REACH OFFLINE AND ONLINE

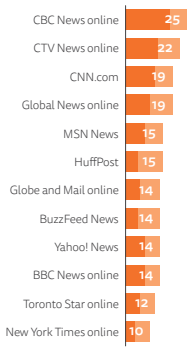
TOP BRANDS
% Weekly usage

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

TV, RADIO AND PRINT (ENGLISH)



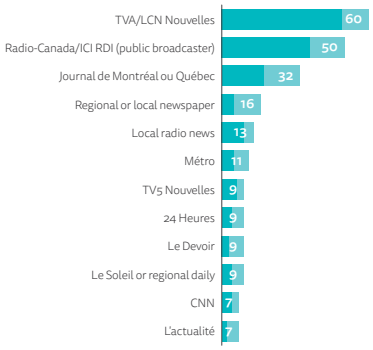
ONLINE (ENGLISH)



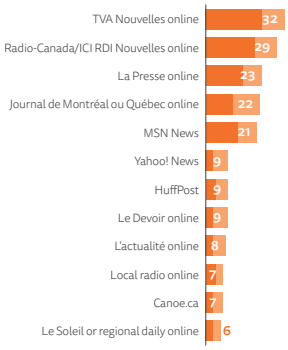
13% pay for **ONLINE NEWS**
English 14% | French 13%

33% listened to **PODCASTS** in the last month

TV, RADIO AND PRINT (FRENCH)



ONLINE (FRENCH)

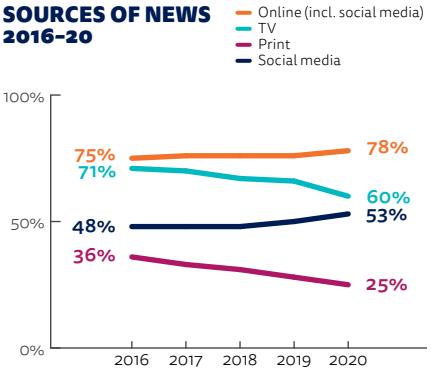


DIFFERENT TYPES OF TRUST

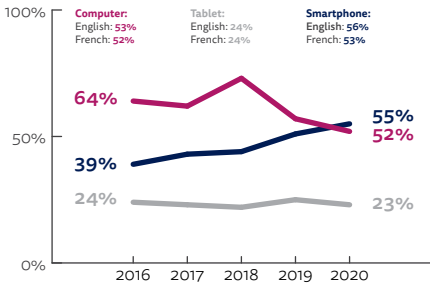
News overall	*News I use*
44% (-8) =14th/40	**52%**
English 44%	English 52%
French 49%	French 59%

News in search	*News in social*
31%	**19%**
English 31%	English 18%
French 34%	French 20%

SOURCES OF NEWS 2016-20



DEVICES FOR NEWS 2016-20*

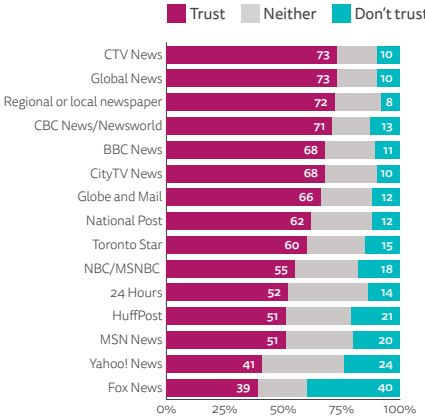


*2018 figures for computer use were likely overstated due to an error in polling.

TOP SOCIAL MEDIA AND MESSAGING

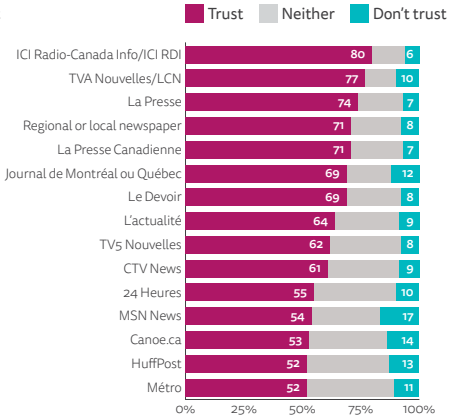
Rank	Brand	For News	For All
1	Facebook	41% (+1)	69%
2	YouTube	27% (+2)	66%
3	Facebook Messenger	13% (+1)	49%
4	Twitter	13% (+2)	25%
5	Instagram	10% (+2)	35%
6	WhatsApp	6% (+2)	21%

BRAND TRUST SCORES (ENGLISH)



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

BRAND TRUST SCORES (FRENCH)



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

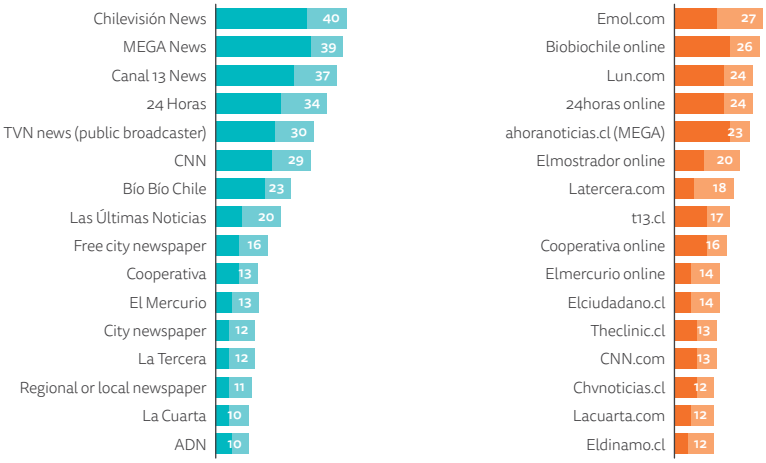
Population	18m
Internet penetration	77%

CHILE*

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

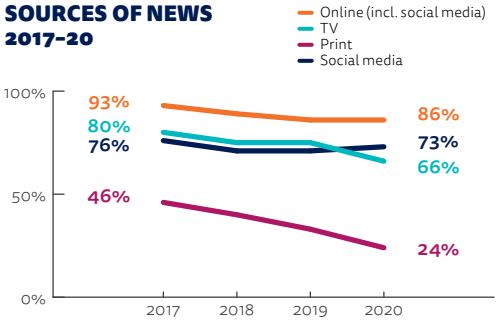
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



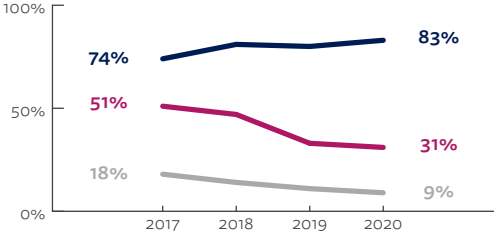
CHANGING MEDIA

Television remains the most important traditional news source in Chile, beating radio and newspapers. But for the first-time social media (73%) have overtaken TV (66%) as a source of news. Instagram (+8) is increasingly used by publishers as a way of drawing attention to content.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

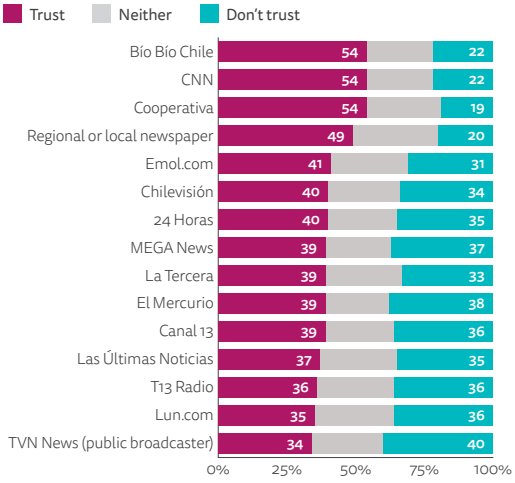
Trust has fallen substantially in the last year (-15) following protests about falling living standards and inequality. In a country with the most concentrated media ownership in Latin America, journalists are seen as part of an unrepresentative political class and there is resentment on the streets about news coverage on TV and in the press.

DIFFERENT TYPES OF TRUST

News overall	News I use
30% (-15) =28th/40	37%

News in search	News in social
36%	34%

BRAND TRUST SCORES



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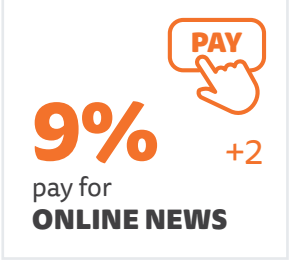


TOP SOCIAL MEDIA AND MESSAGING

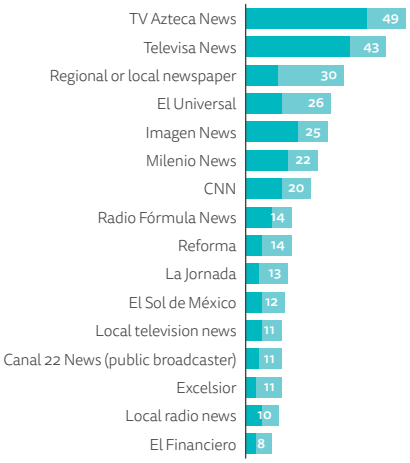
Rank	Brand	For News		For All
1	Facebook	63%	(-1)	80%
2	WhatsApp	40%	(-)	80%
3	Instagram	28%	(+8)	55%
4	YouTube	27%	(-4)	73%
5	Twitter	22%	(+6)	31%
6	Facebook Messenger	14%	(-)	43%

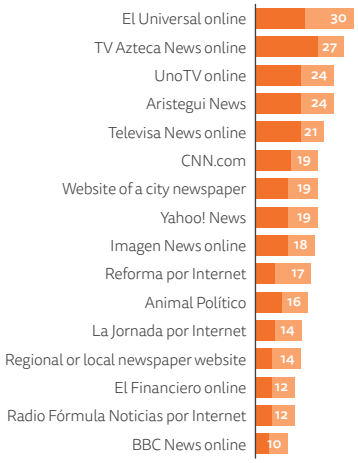
*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

Population 132m
Internet penetration 66%

MEXICO*

WEEKLY REACH OFFLINE AND ONLINE

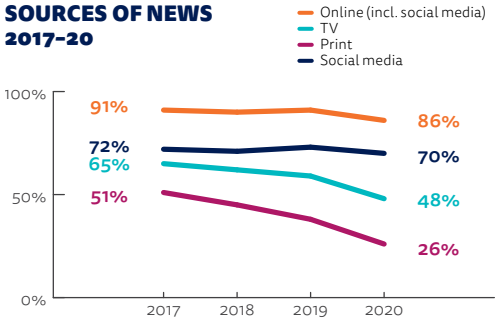




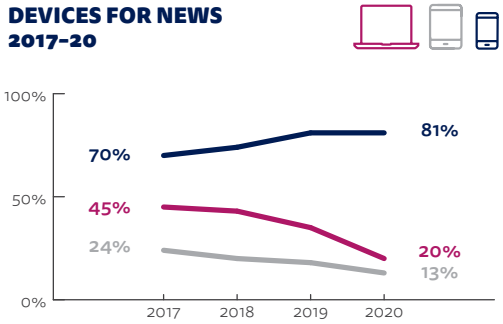
CHANGING MEDIA

Online and social media remain the most popular sources of news in Mexico with our predominantly urban sample. TV and radio remain important to reach the millions of people who are not online. The majority of internet news access is now via smartphones (81%) rather than computers or tablets.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

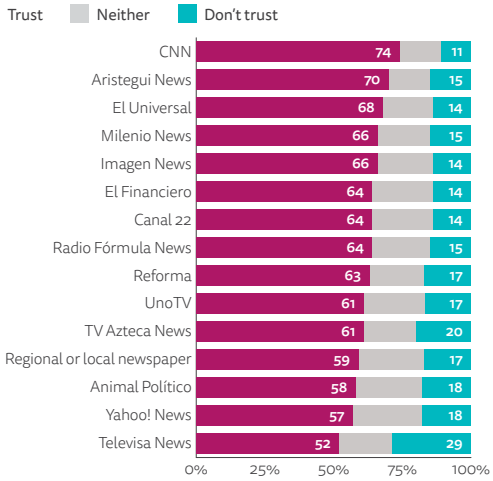
The new government and a deeply polarised political environment have had a negative impact on trust in the news (-11) over the last year. Television is a popular medium with both audiences and advertisers, but domestic TV broadcasters often have lower trust scores in our survey than foreign broadcasters (CNN) and some digital-born brands.

DIFFERENT TYPES OF TRUST

News overall	News I use
39% (-11) =17th/40	45%

News in search	News in social
43%	37%

BRAND TRUST SCORES

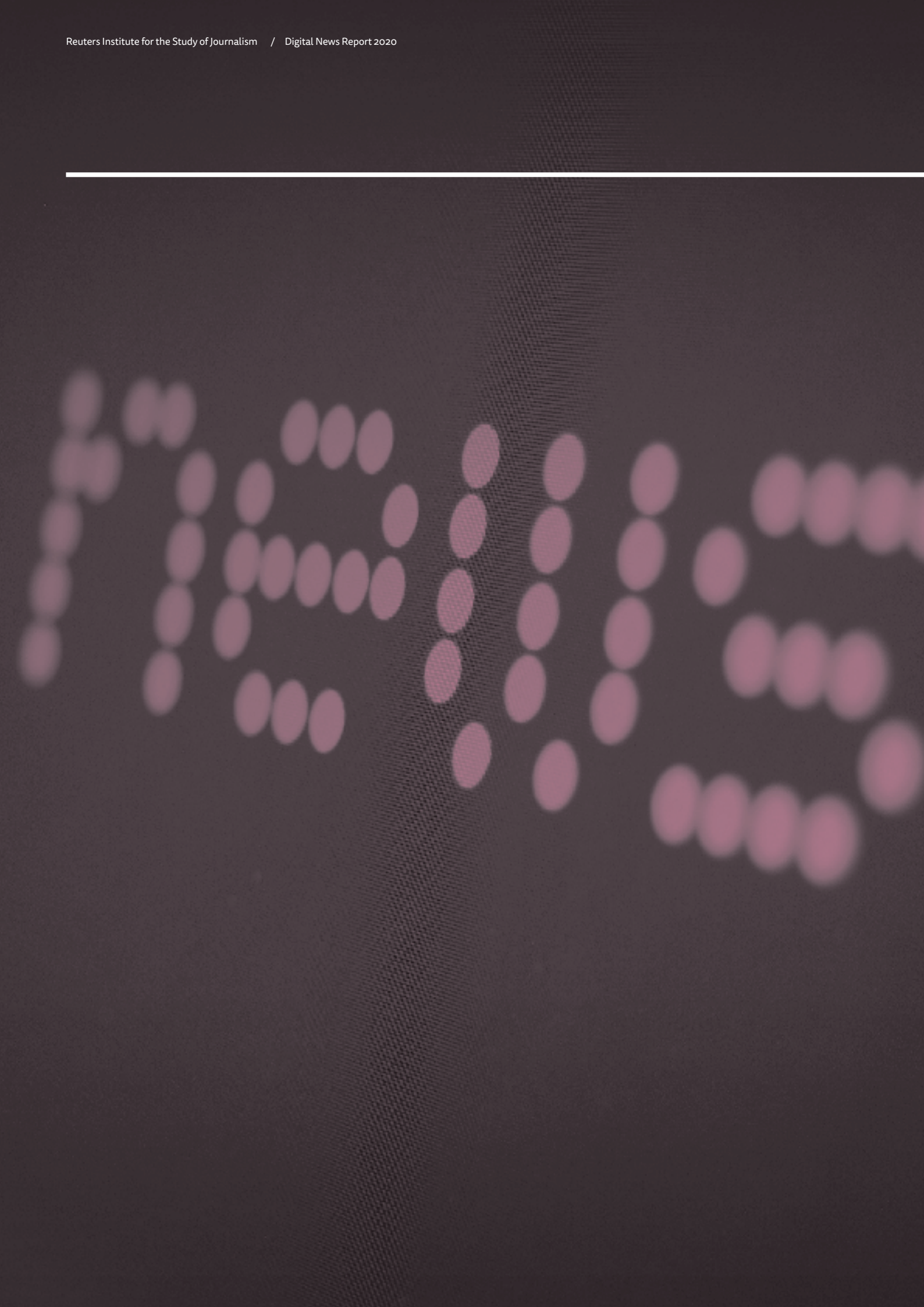


Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	70%	(+3)	83%
2	YouTube	44%	(+2)	78%
3	WhatsApp	39%	(-2)	76%
4	Facebook Messenger	20%	(+1)	53%
5	Twitter	15%	(-8)	26%
6	Instagram	13%	(-2)	39%

*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.



SECTION 3

Country and Market Data **Asia Pacific**

ASIA PACIFIC		
3.31	Australia	96
3.32	Hong Kong	97
3.33	Japan	98
3.34	Malaysia	99
3.35	Philippines	100
3.36	Singapore	101
3.37	South Korea	102
3.38	Taiwan	103

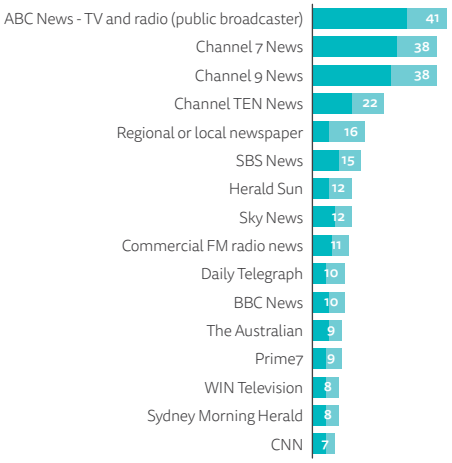
Population	25m
Internet penetration	89%

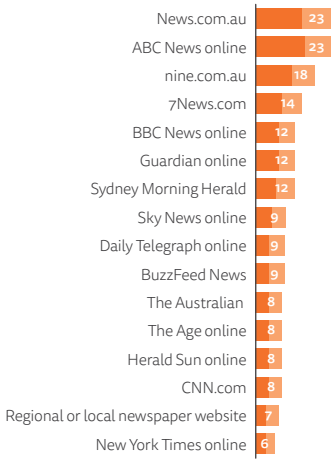
AUSTRALIA

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

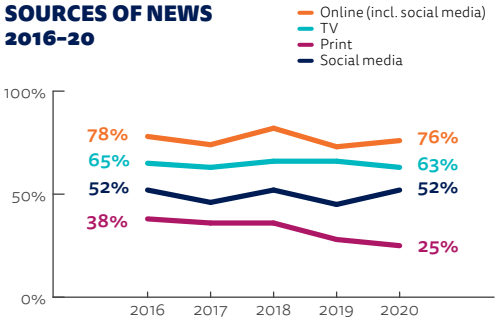




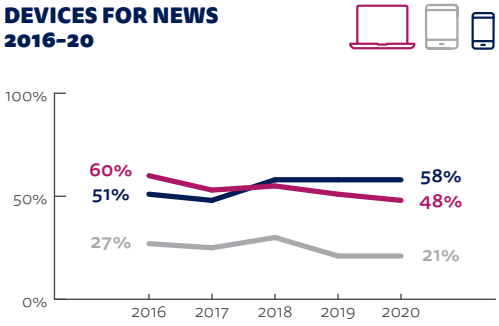
CHANGING MEDIA

TV news remains strong and steady and continues to be a significant source of news, especially for the COVID-19 and bushfire crises, while newspapers continue to fall, and social media stagnate. Online, increasing numbers of Australians are using their mobile phones to access news, widening the gap between mobiles and computers.

SOURCES OF NEWS 2016-20



DEVICES FOR NEWS 2016-20



TRUST

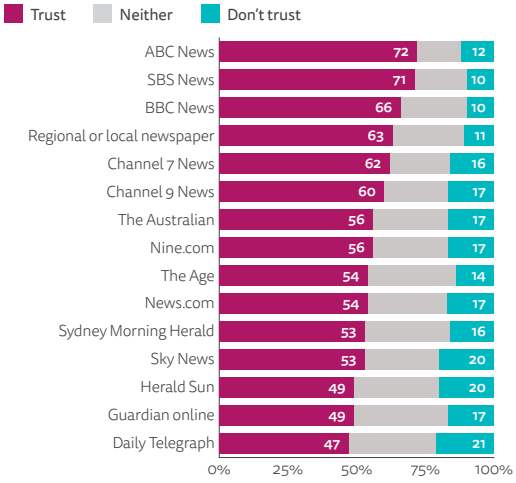
This year's findings need to be seen through the prism of the bushfire crisis that was ongoing when this survey was taken. Trust in news and trust in news I use dropped over the past 12 months and the number of people who say they do not trust the news also rose. The fall is bigger among people who rely mainly on traditional news compared to those who rely mainly on online news.

DIFFERENT TYPES OF TRUST

News overall	News I use
38% (-6) =19th/40	46%

News in search	News in social
30%	17%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

14% pay for **ONLINE NEWS**

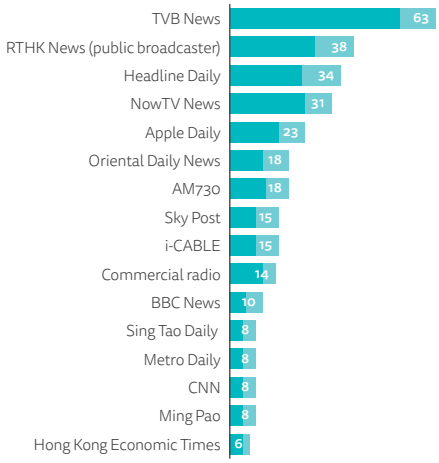
TOP SOCIAL MEDIA AND MESSAGING

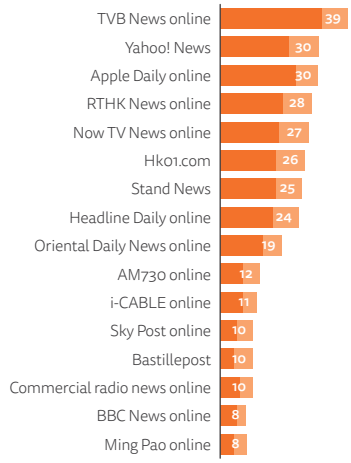
Rank	Brand	For News	For All
1	Facebook	39% (+3)	71%
2	YouTube	21% (+2)	59%
3	Facebook Messenger	12% (+2)	51%
4	Twitter	10% (+1)	19%
5	Instagram	9% (+2)	35%
6	WhatsApp	8% (+2)	26%

Population 7.5m
Internet penetration 89%

HONG KONG

WEEKLY REACH OFFLINE AND ONLINE

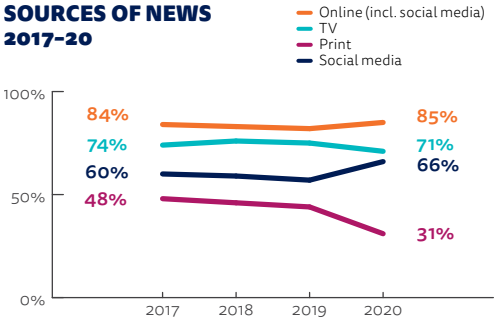




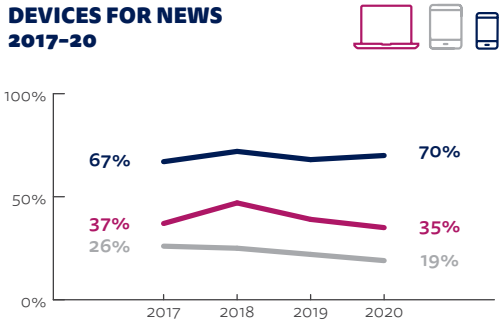
CHANGING MEDIA

A series of street protests triggered by a government extradition bill captured media attention, with growth online via social media use in particular. Encrypted messaging service WhatsApp is used by 84% overall and 50% for news (+9). Usage of YouTube and Instagram for news was also up.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

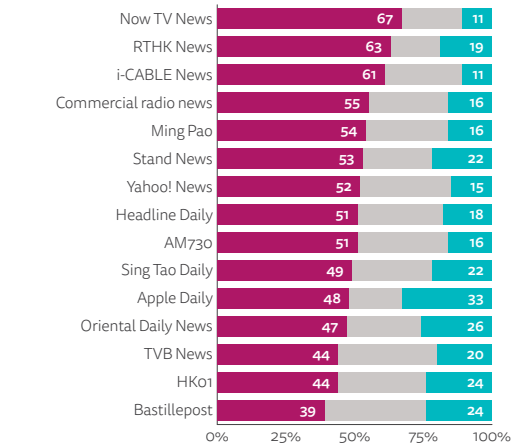
The months-long anti-extradition protests appeared to have influenced overall trust (-16) as well as the trust in individual brands. Television and radio broadcasters continue to be most trusted but online brand Stand News gained significant attention and approval for its coverage. In early 2019 it was the second least trusted outlet. A year later it has become the sixth *most* trusted.

DIFFERENT TYPES OF TRUST

News overall	News I use
30% (-16) =28th/40	**39%**

News in search	News in social
24%	**18%**

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	58%	(+6)	79%
2	WhatsApp	50%	(+9)	84%
3	YouTube	39%	(+8)	71%
4	WeChat	16%	(-)	48%
5	Instagram	16%	(+3)	39%
6	Facebook Messenger	10%	(-)	35%

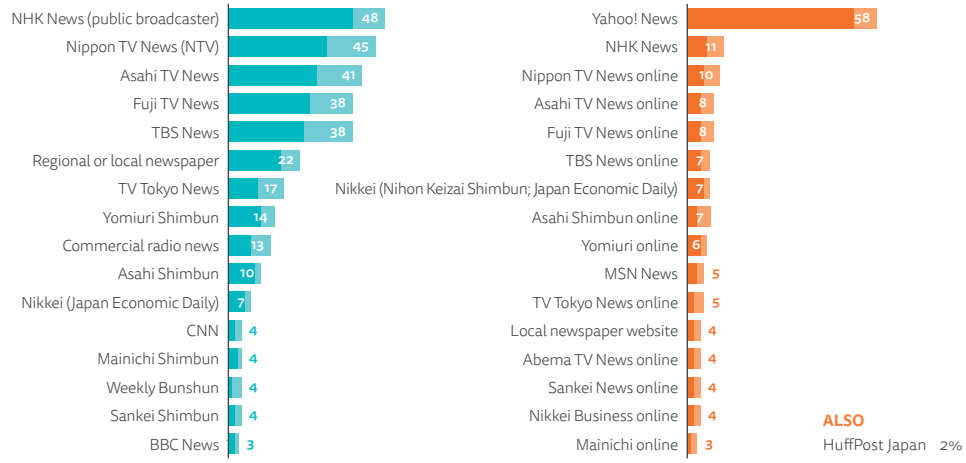
Population 127m
Internet penetration 93%

JAPAN

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

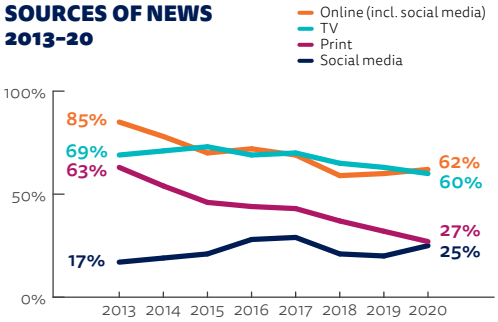
- Weekly use TV, radio & print
- More than 3 days per week TV, radio & print
- Weekly use online brands
- More than 3 days per week online brands



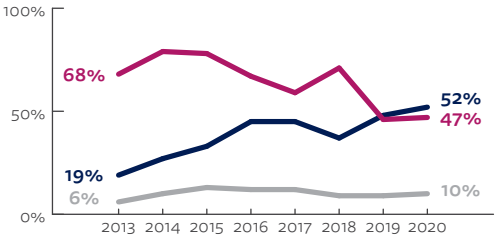
CHANGING MEDIA

Traditional forms of media such as TV and print have declined rapidly over the last seven years. Newspaper readership has almost halved. Japanese engage with online news primarily through aggregators like Yahoo! News. They also tend to use social networks less, and have taken longer to fully embrace smartphones.

SOURCES OF NEWS 2013-20



DEVICES FOR NEWS 2013-20*



*2018 computer figures are likely to be overstated, and smartphone understated due to an issue with data collection.

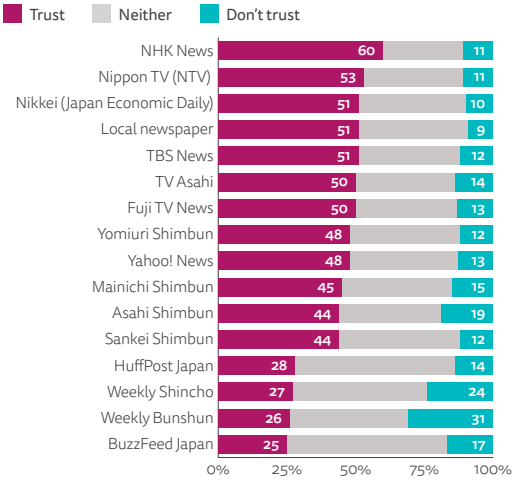
TRUST

Fewer than four in ten (37%) trust the news in Japan – a fall of around ten percentage points in the last five years. Public broadcaster NHK remains the most trusted news brand while popular magazines (*Weekly Shincho*, *Weekly Bunshun*) which have a reputation for gossip and sensationalism are least trusted – along with some digital-born brands.

DIFFERENT TYPES OF TRUST

News overall	News I use
37% (-2) 22nd/40	36%
News in search	**News in social**
23%	20%

BRAND TRUST SCORES

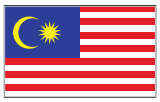


Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

8% +1
pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

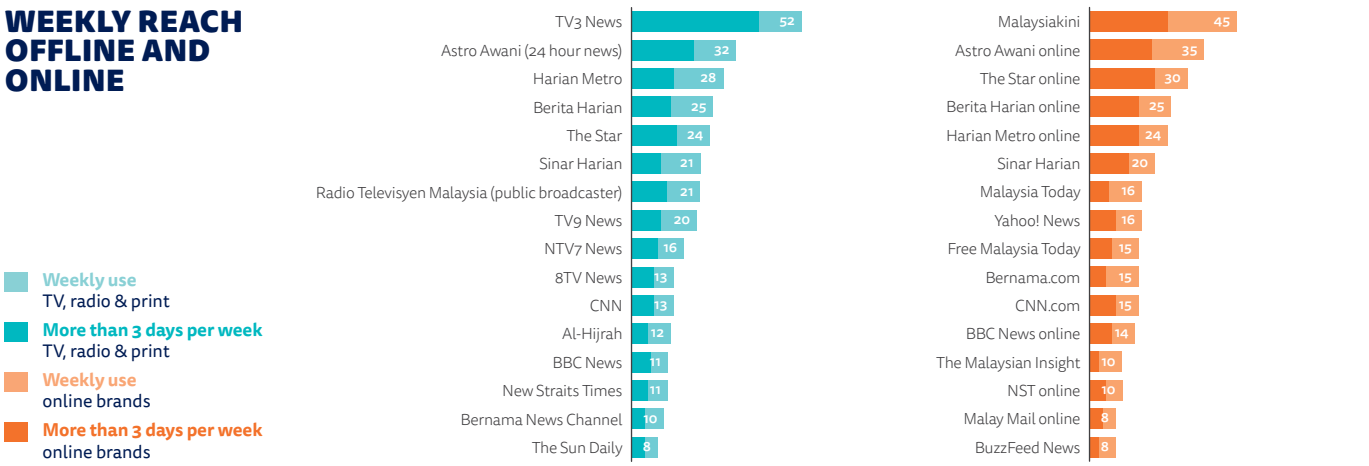
Rank	Brand	For News	For All
1	YouTube	19% (+3)	54%
2	Line	16% (+2)	41%
3	Twitter	15% (+5)	30%
4	Facebook	6% (+1)	20%
5	Instagram	3% (+1)	21%
6	Niconico	2% (-)	10%



Population 32m
Internet penetration 81%

MALAYSIA*

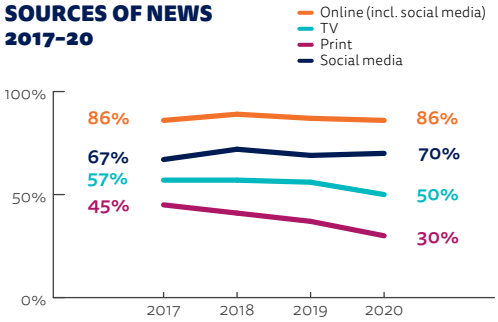
WEEKLY REACH OFFLINE AND ONLINE



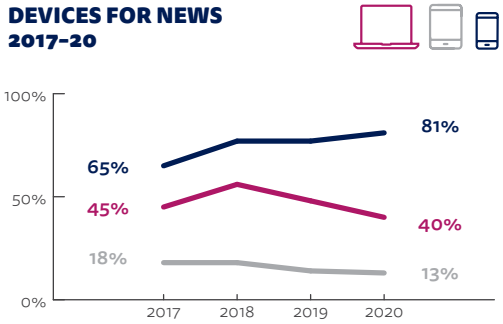
CHANGING MEDIA

Online and social media remain the predominant sources of news for our online sample of Malaysian news users. TV and print continue to play an important role for those not online. Smartphones are the main access point for digital news, with access from computers and tablets falling over time.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



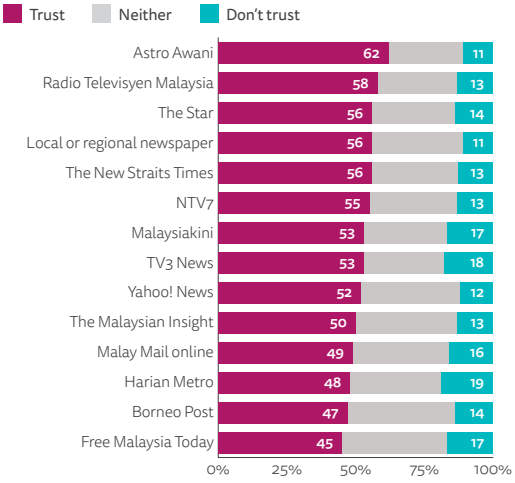
TRUST

Overall trust in the media is amongst the lowest in our survey, with just a quarter (25%) saying they trust most news most of the time. 24-hour TV news channel Astro Awani leads in the area of brand trust, taking a sometimes-critical approach to discussing news and current affairs.

DIFFERENT TYPES OF TRUST

News overall	News I use
25% (-6) 37th/40	31%
News in search	**News in social**
25%	17%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5.
Those that haven't heard of each brand were excluded.

TOP SOCIAL MEDIA AND MESSAGING

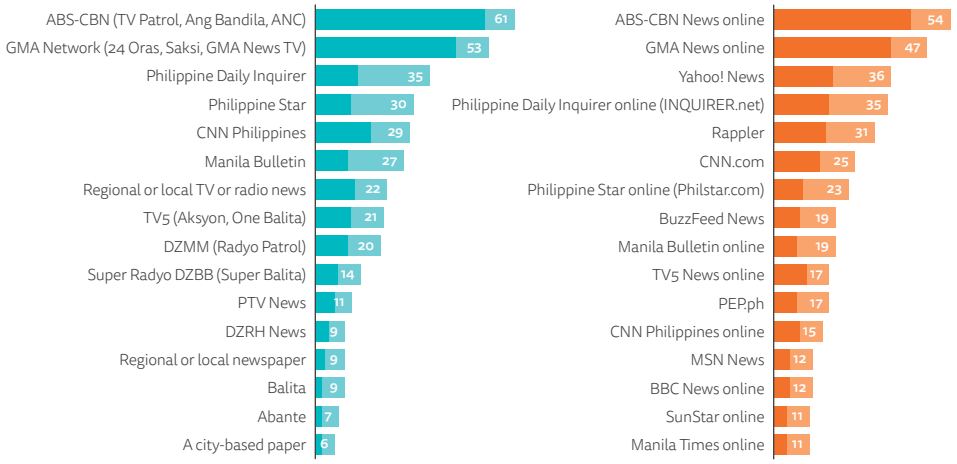
Rank	Brand	For News		For All
1	Facebook	57%	(-3)	77%
2	WhatsApp	51%	(+1)	81%
3	YouTube	33%	(+1)	71%
4	Instagram	20%	(-1)	47%
5	Twitter	15%	(+1)	25%
6	Facebook Messenger	11%	(-)	36%

*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

Population 110m
Internet penetration 72%

PHILIPPINES*

WEEKLY REACH OFFLINE AND ONLINE



TOP BRANDS
% Weekly usage

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

SOURCES OF NEWS

TV **66%**

Online (including social media) **85%**

Print **22%**

Social media **68%**

DEVICES FOR NEWS

Computer **39%**

Smartphone **75%**

Tablet **14%**

TRUST

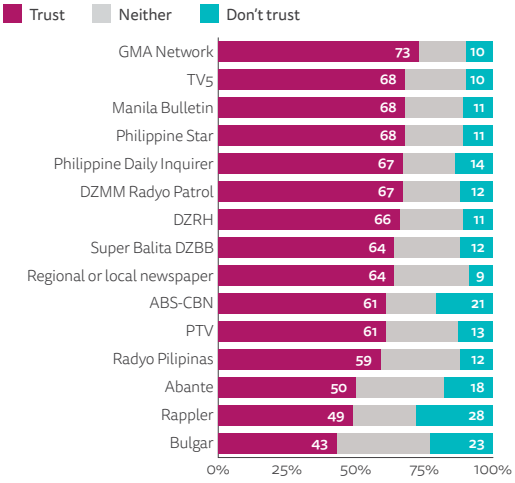
Journalists have been labelled 'prostitutes', 'fake news', and 'lowlifes' by President Duterte in his battle with media critics. Trust in ABS-CBN, which has been fighting a government shutdown order, scored 61% in the survey, 12 points lower than the GMA Network, which has a reputation for more cautious decision-making. Rappler, which is fighting multiple court cases, has a score of 49%.

DIFFERENT TYPES OF TRUST

News overall	News I use
27% =35th/40	34%

News in search	News in social
31%	22%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

19% pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

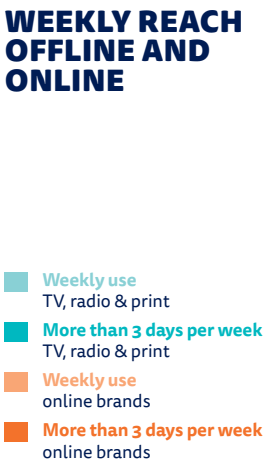
Rank	Brand	For News	For All
1	Facebook	73%	86%
2	YouTube	49%	78%
3	Facebook Messenger	33%	70%
4	Twitter	16%	30%
5	Instagram	12%	36%
6	LinkedIn	6%	18%

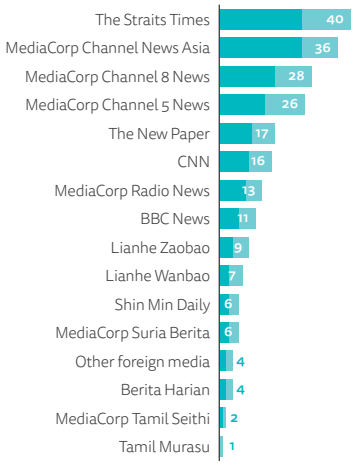
*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

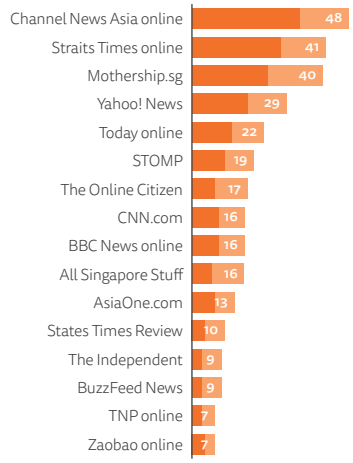
Population 5.9m
Internet penetration 88%

SINGAPORE

WEEKLY REACH OFFLINE AND ONLINE



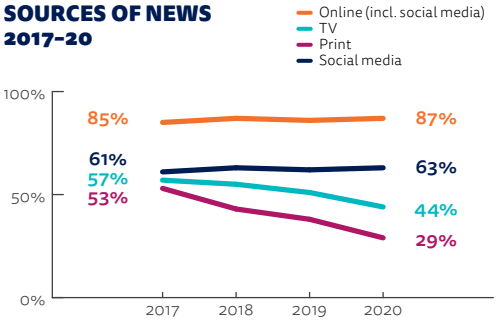




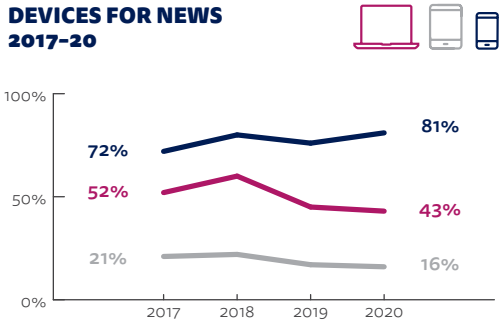
CHANGING MEDIA

Print consumption has declined significantly over the last few years while online and social media continue to dominate. In this high-tech city state, mobile news consumption dominates with the vast majority (81%) now accessing news via smartphone.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

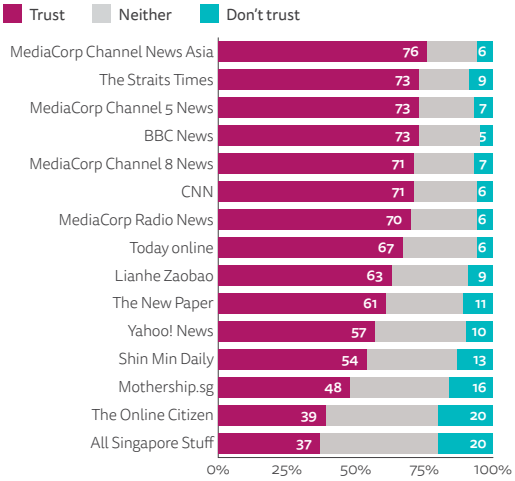
The new fake news law has not helped trust levels in the news (down six percentage points) or trust in the news found in social media (down two). Established traditional media companies tend to be trusted most – along with international brands like the BBC and CNN. Popular digital brands like Mothership.sg have not yet built credibility with many news users.

DIFFERENT TYPES OF TRUST

News overall	News I use
36% (-6) =23rd/40	41%

News in search	News in social
26%	17%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

PAY

14% -2

pay for **ONLINE NEWS**

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	WhatsApp	47%	(+6)	86%
2	Facebook	46%	(-2)	73%
3	YouTube	24%	(-3)	73%

Rank	Brand	For News		For All
4	Instagram	16%	(+1)	51%
5	Telegram	11%	(+4)	30%
6	Facebook Messenger	8%	(-1)	33%

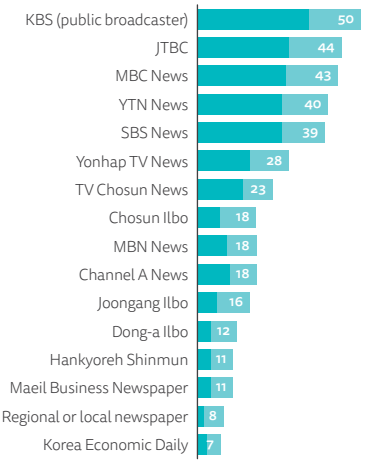
Population	51m
Internet penetration	96%

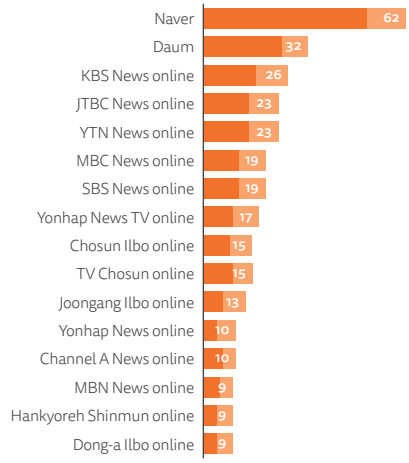
SOUTH KOREA

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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

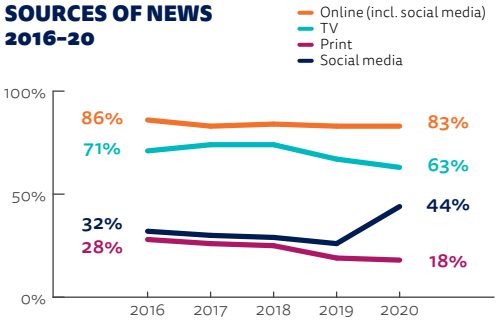




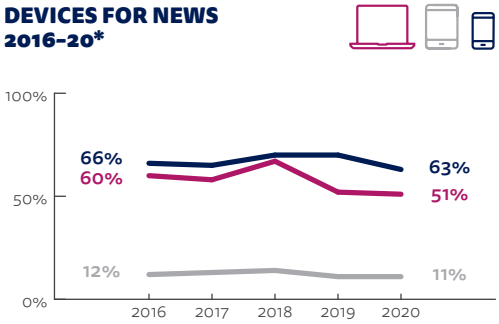
CHANGING MEDIA

Audiences for traditional TV news have started to dip, partly due to more competition from long- and short-form video online. YouTube is being increasingly used for news (+7) and this partly explains the surge in social media use. Readership of newspapers is significantly down since 2016 and is likely to be hit further in the aftermath of COVID-19.

SOURCES OF NEWS 2016-20



DEVICES FOR NEWS 2016-20*



*2018 figures for computer use were likely overstated due to an error in polling.

TRUST

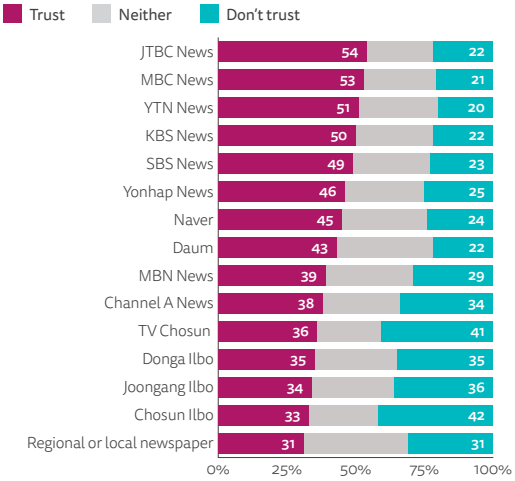
Trust in the news in South Korea is consistently amongst the lowest in our survey, though confidence in individual news brands is much higher. TV news brands such as JTBC, MBC, and YTN tend to be trusted most, with popular newspapers least trusted in general – even if they are often better trusted by those that use the brands regularly.

DIFFERENT TYPES OF TRUST

News overall	News I use
21% (-1) 40th/40	27%

News in search	News in social
19%	16%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

10% pay for **ONLINE NEWS**

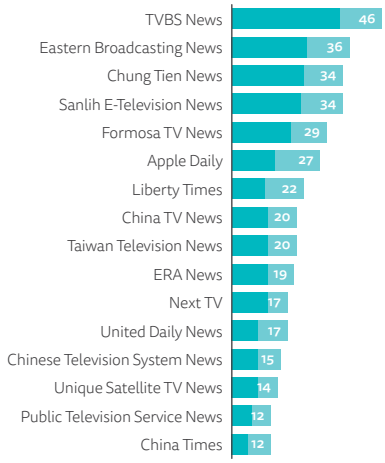
TOP SOCIAL MEDIA AND MESSAGING

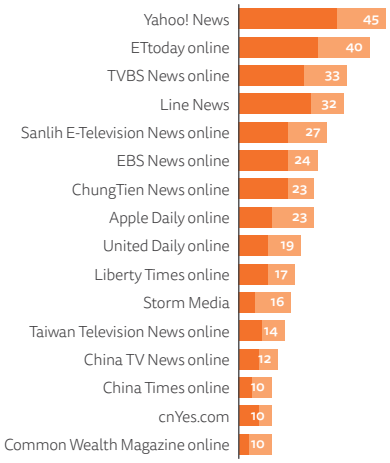
Rank	Brand	For News		For All
1	YouTube	45%	(+7)	72%
2	Kakao Talk	27%	(-1)	73%
3	Facebook	19%	(-3)	43%
4	Instagram	9%	(+1)	38%
5	Kakao Story	8%	(+1)	26%
6	Twitter	6%	(-1)	17%

Population	24m
Internet penetration	93%

TAIWAN

WEEKLY REACH OFFLINE AND ONLINE

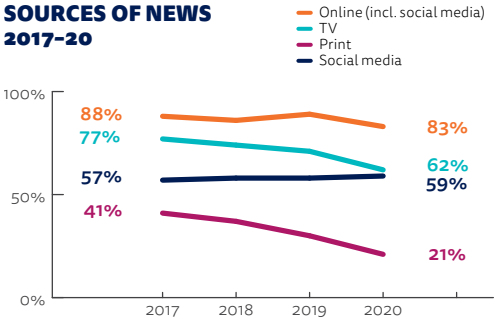




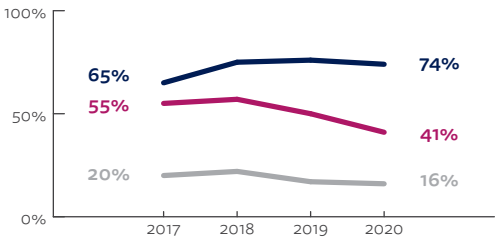
CHANGING MEDIA

Traditional media sources such as television and print are becoming less important while digital and social media have become more widely used. Yahoo! News remains the most popular online (45% weekly reach) aggregating multiple providers. Taiwanese love their smartphones, which are used by three-quarters (74%) of our survey sample for news.

SOURCES OF NEWS 2017-20



DEVICES FOR NEWS 2017-20



TRUST

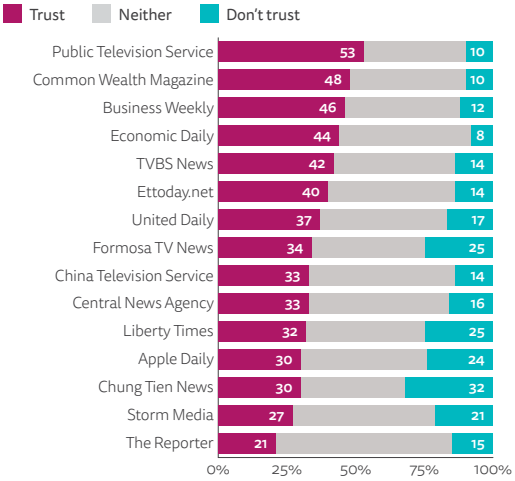
Trust in news is down four percentage points and remains one of the lowest in our survey – with Taiwanese frequently exposed to misinformation through both mainstream and social media. Public service television is the most trusted in our survey, though not competitive in terms of audience. Networks with strong links to the mainland tend to be trusted less.

DIFFERENT TYPES OF TRUST

News overall	News I use
24% (-4) 38th/40	31%

News in search	News in social
24%	16%

BRAND TRUST SCORES



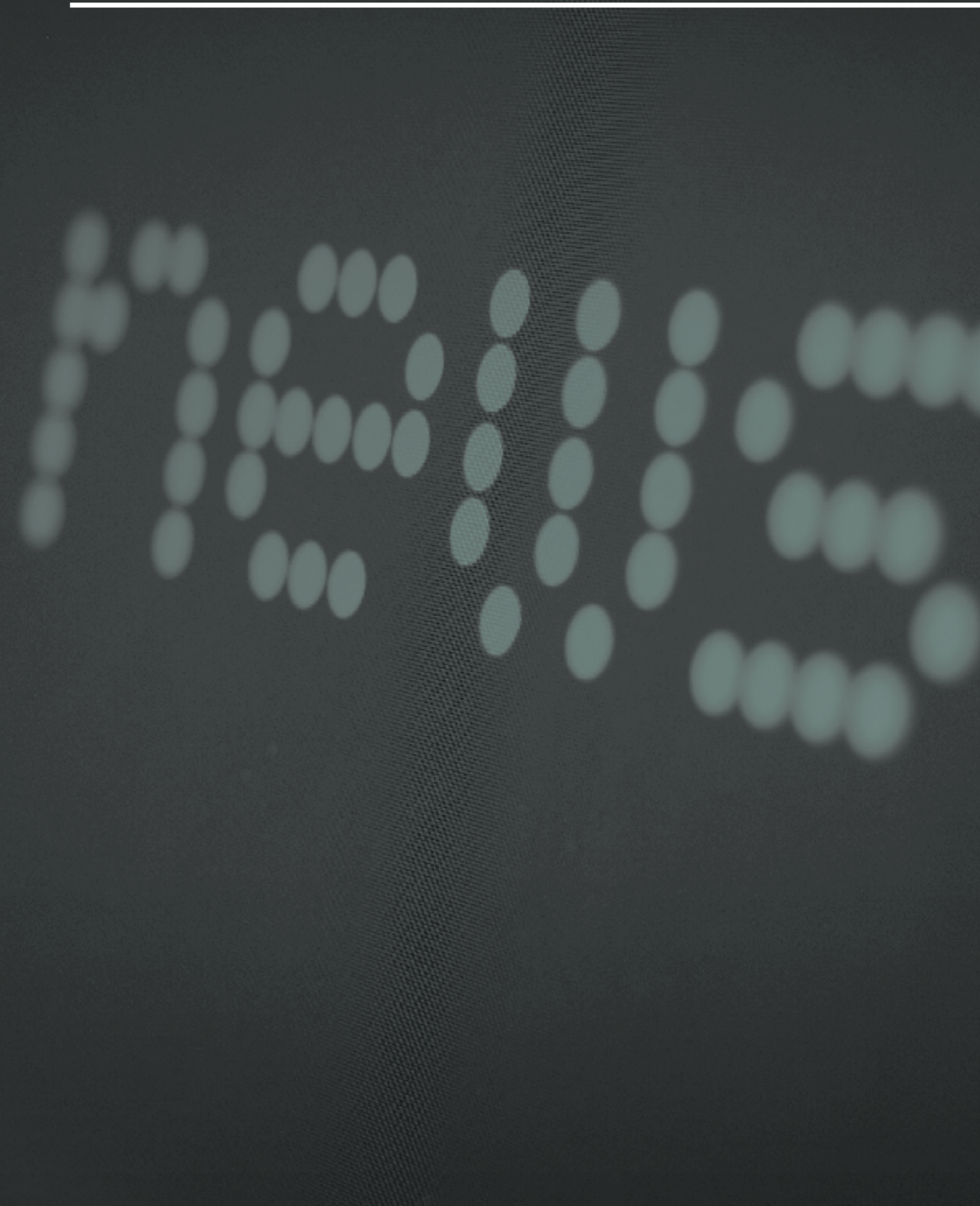
Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

15% +3
pay for
ONLINE NEWS

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Line	49%	(-8)	67%
2	Facebook	47%	(-7)	70%
3	YouTube	41%	(-2)	68%

Rank	Brand	For News		For All
4	PTT (bulletin board)	8%	(-4)	17%
5	Facebook Messenger	8%	(-)	30%
6	Instagram	8%	(+1)	28%



SECTION 3

Country and Market Data **Africa**

AFRICA		
3.39	Kenya	106
3.40	South Africa	107

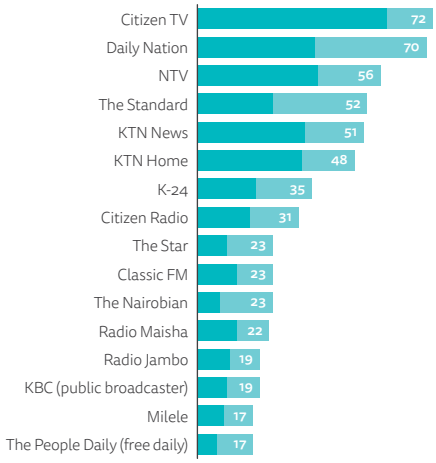
Population	54m
Internet penetration	87%

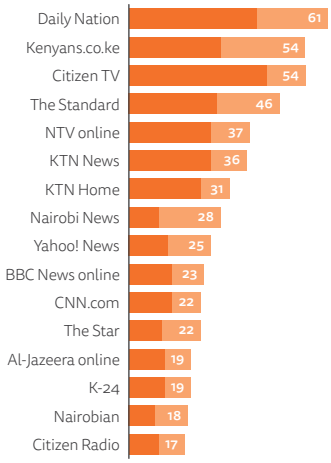
KENYA*

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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





SOURCES OF NEWS

TV **74%**

Online (including social media) **90%**

Print **47%**

Social media **77%**

DEVICES FOR NEWS

Computer **55%**

Smartphone **83%**

Tablet **11%**

TRUST

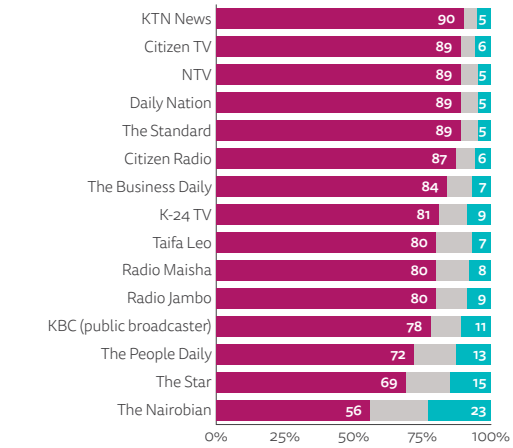
Kenya has relatively high levels of trust in the media, with half (50%) saying they trust most news most of the time. Lively commercial TV networks pull in big audiences for news and are highly trusted. The public broadcaster KBC is trusted less, with tabloid newspapers least trusted in our survey.

DIFFERENT TYPES OF TRUST

News overall	News I use
50% 6th/40	57%

News in search	News in social
51%	34%

BRAND TRUST SCORES



Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

63%
SHARE NEWS by social media, email, or messaging

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News	For All
1	WhatsApp	67%	90%
2	Facebook	66%	82%
3	YouTube	51%	83%
4	Twitter	40%	56%
5	Instagram	26%	56%
6	Facebook Messenger	21%	48%

* Sample in Kenya only includes those aged 18-54.
Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.

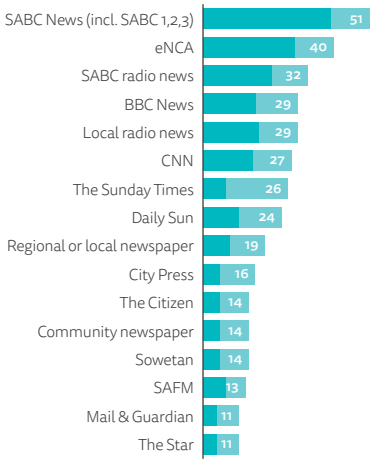
Population 59m
Internet penetration 55%

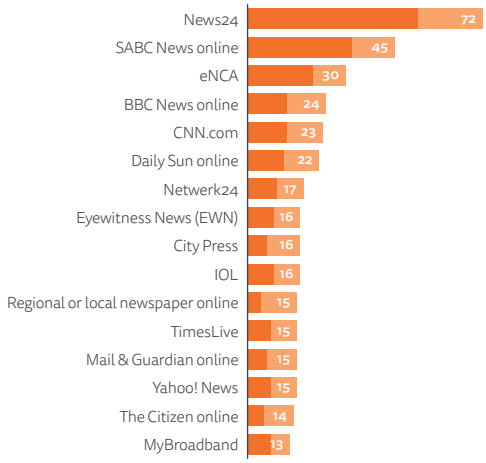
SOUTH AFRICA*

WEEKLY REACH OFFLINE AND ONLINE

TOP BRANDS
% Weekly usage

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





SOURCES OF NEWS

TV **68%** (-)

Online (including social media) **90%** (-)

Print **37%** (-3)

Social media **73%** (+1)

DEVICES FOR NEWS

Computer **52%** (-6)

Smartphone **82%** (+6)

Tablet **17%** (-2)

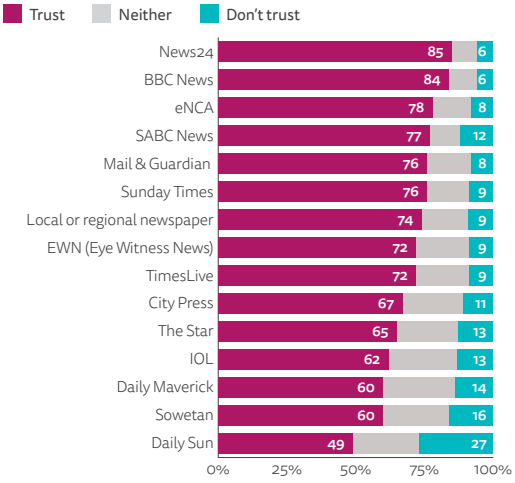
TRUST

South African media have a strong reputation for independence but political and business interference is an increasing concern. The website News24 has built credibility on the back of investments in breaking news. Tabloid newspapers like the *Daily Sun* are widely used but less well trusted.

DIFFERENT TYPES OF TRUST

News overall	*News I use*
48% (-1) =7th/40	**56%**
News in search	*News in social*
49%	**28%**

BRAND TRUST SCORES



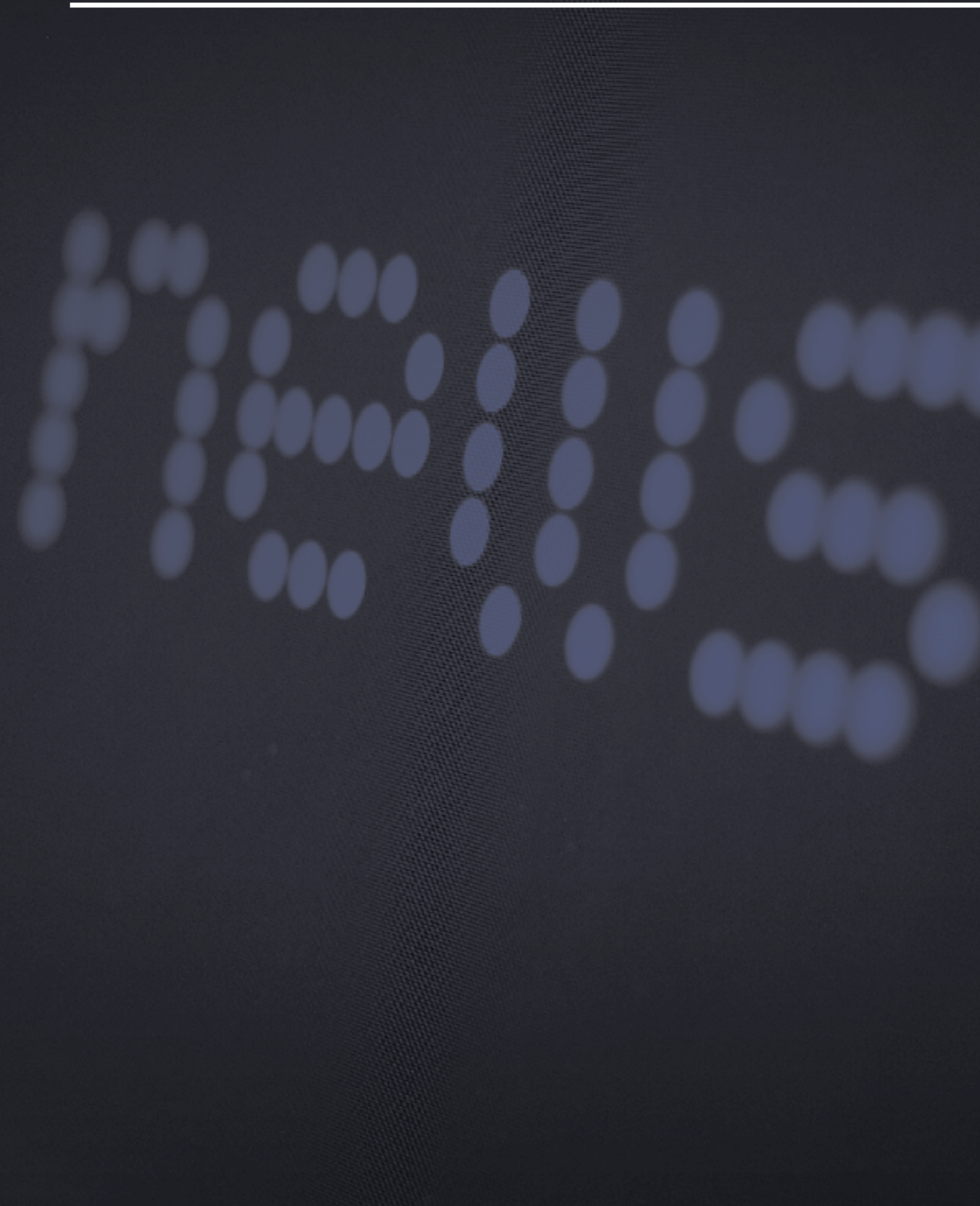
Trust = % scored 6-10 on 10-point scale, Don't trust = 0-4, Neither = 5. Those that haven't heard of each brand were excluded.

61%
SHARE NEWS by social media, email, or messaging

TOP SOCIAL MEDIA AND MESSAGING

Rank	Brand	For News		For All
1	Facebook	57%	(-2)	79%
2	WhatsApp	49%	(-)	88%
3	YouTube	39%	(+4)	75%
4	Twitter	23%	(+3)	38%
5	Instagram	17%	(+3)	43%
6	Facebook Messenger	13%	(-1)	46%

*Data are from more urban areas, rather than a fully nationally representative sample. These will tend to represent richer and more connected users.



SECTION 4

References and Selected Publications

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.

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Anne Schulz, Richard Fletcher, and Marina Popescu, *Are News Outlets Viewed in the Same Way by Experts and the Public? A Comparison across 23 European Countries* (May 2020)

Rasmus Kleis Nielsen, Richard Fletcher, Nic Newman, J. Scott Brennen, and Philip N. Howard, *Navigating the 'Infodemic': How People in Six Countries Access and Rate News and Information about Coronavirus* (Apr. 2020)

J. Scott Brennen, Felix M. Simon, Philip N. Howard, and Rasmus Kleis Nielsen, *Types, Sources, and Claims of COVID-19 Misinformation* (Apr. 2020)

Simge Andı, Meera Selva, and Rasmus Kleis Nielsen, *Women and Leadership in the News Media* (Mar. 2020)

Richard Fletcher, Nic Newman, and Anne Schulz, *A Mile Wide, an Inch Deep: Online News and Media Use in the 2019 UK General Election* (Feb. 2020)

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Nic Newman and Nathan Gallo, *News Podcasts and the Opportunities for Publishers* (Dec. 2019)

J. Scott Brennen, Anne Schulz, Philip N. Howard, and Rasmus Kleis Nielsen, *Industry, Expert, or Industry Experts? Academic Sourcing in News Coverage of AI* (Dec. 2019)

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Lucas Galan, Jordan Osserman, Tim Parker, Matt Taylor, *How Young People Consume News and the Implications for Mainstream Media* (Sept. 2019)

Silvia Majó-Vázquez, Subhayan Mukerjee, Taberez Ahmed Neyazi, Rasmus Kleis Nielsen, *The Role of Legacy and Digital-Born Outlets in India and the Distribution of Their Online Audiences* (June 2019)

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