



REUTERS
INSTITUTE for the
STUDY of
JOURNALISM

REUTERS INSTITUTE DIGITAL NEWS REPORT 2014





REUTERS
INSTITUTE for the
STUDY of
JOURNALISM

REUTERS INSTITUTE DIGITAL NEWS REPORT 2014 TRACKING THE FUTURE OF NEWS

EDITED BY

NIC NEWMAN AND DAVID A. L. LEVY

SUPPORTED BY



francetélévisions



SURVEY BY



	Foreword by David A. L. Levy	5
	Methodology	6
	Authorship and Research Acknowledgements	7
	Executive Summary and Key Findings by Nic Newman	8
Section 1	Analysis by Country	19
1.1	US	20
1.2	UK	22
1.3	Germany	24
1.4	France	26
1.5	Denmark	28
1.6	Finland	30
1.7	Spain	32
1.8	Italy	34
1.9	Urban Brazil	36
1.10	Japan	38
1.11	Comparative Brand Data Analysis	40
Section 2	News Access and Consumption	43
2.1	Frequency of Access and Interest in News	43
2.2	New Segmentation	45
2.3	When and Where do we Access the News?	46
2.4	Interest in Different Types of News	49
2.5	Political News and Political Engagement	51
Section 3	Paying for News	55
3.1	Newspaper Purchase across Countries	55
3.2	Paying for Digital News	56
Section 4	Online News in Detail	59
4.1	The Growth of Multi-Platform News	59
4.2	Types of News and the Role of Video	65
4.3	Pathways to News: How Audiences Discover News Online	68
4.4	Social Networks and Participation with News	70
4.5	Participation and Engagement Online	73
Section 5	Essays	75
5.1	Objectivity and Impartiality for Digital News Consumers <i>Richard Sambrook</i>	76
5.2	New Approaches to Paid Digital Content <i>Robert G. Picard</i>	80
5.3	Gateways and Journeys to the News: UK Case Study <i>Alison Preston</i>	83
5.4	How News and Stories are Followed on Twitter <i>Shaun Austin</i>	87
	Postscript and Further Reading	92

AUTHORSHIP AND RESEARCH ACKNOWLEDGEMENTS

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

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

Commentary and additional insight has been provided by academic partners and by our network of Reuters Journalist

Fellows around the world,² particularly in providing national context on our country pages, where authorship is indicated by initials. We are particularly grateful to:

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

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

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



SPAIN

STATISTICS

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

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

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

with an evening app edition and a daily gossip tablet app.

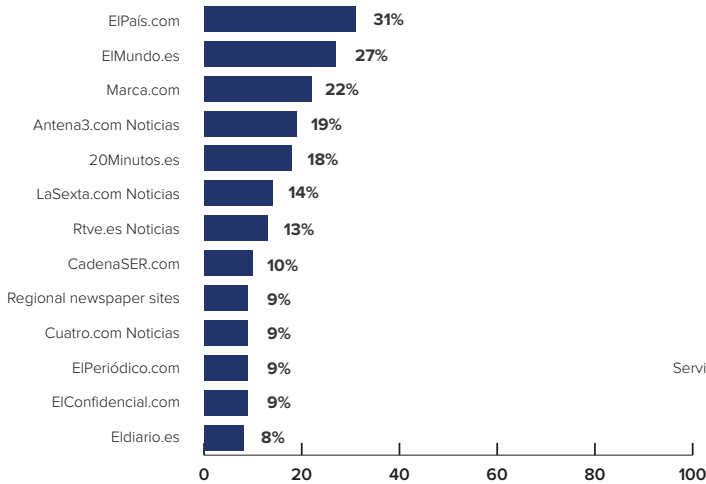
Some regional sites like *Lavanguardia.com* now offer premium content via their websites while online-only sites such as *Eldiario.es* and *Infolibre* (published from Madrid) and *Vilaweb* (a Catalan online pioneer) have voluntary paid membership schemes, with previews and benefits for subscribers.

SN, RS and AAz

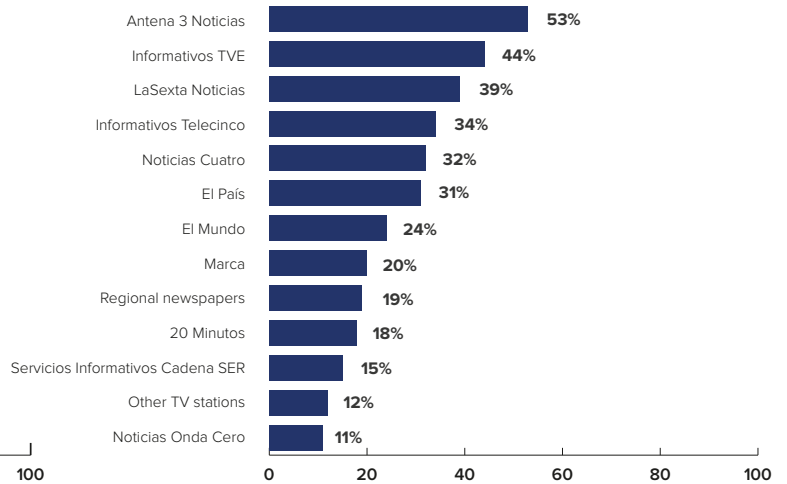


TOP BRANDS – WEEKLY USAGE

ONLINE*



OFFLINE



DIGITAL REACH

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

CROSS PLATFORM REACH

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

TRADITIONAL (OFFLINE) REACH

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

TOP SOCIAL NETWORKS*

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



* used weekly for news

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

43%
 get news on
 at least two
 digital devices

14%
 use three or more
 digital devices

TOP DIGITAL SUBSCRIPTIONS

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



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

APPLE DEVICES VS THE REST (NEWS USAGE)



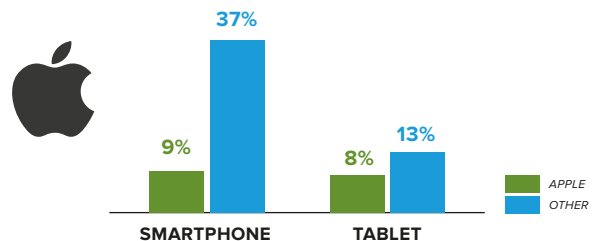
DIGITAL PARTICIPATION

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



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

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



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