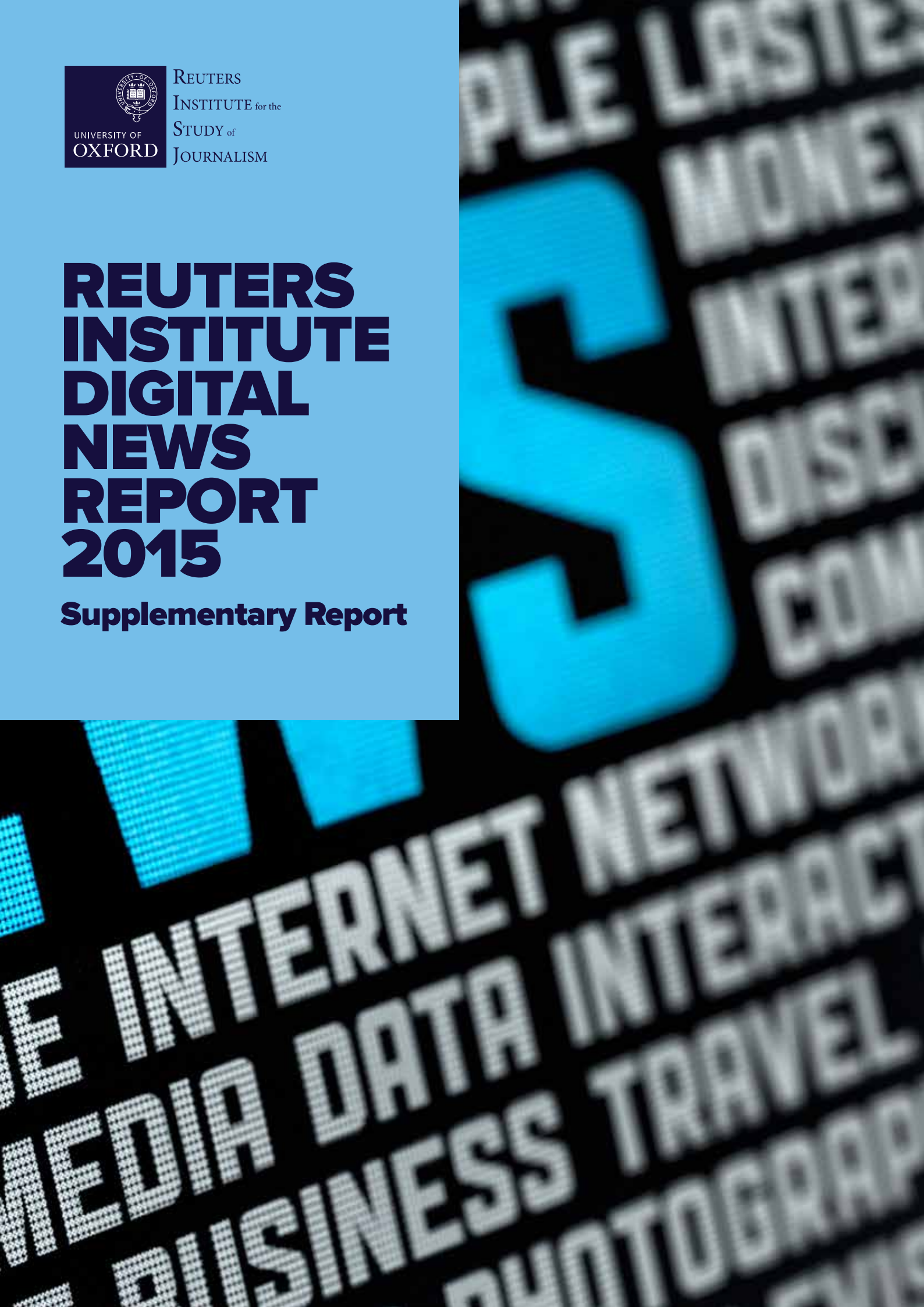




REUTERS
INSTITUTE for the
STUDY of
JOURNALISM

REUTERS INSTITUTE DIGITAL NEWS REPORT 2015

Supplementary Report



REUTERS INSTITUTE DIGITAL NEWS REPORT 2015 SUPPLEMENTARY REPORT

RICHARD FLETCHER AND DAMIAN RADCLIFFE
WITH DAVID A. L. LEVY, RASMUS KLEIS NIELSEN, AND NIC NEWMAN

SUPPORTED BY



SURVEY BY



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FOREWORD

Dr David A. L. Levy

Director, Reuters Institute

This is our second report this year on developments in digital news. Whereas the 2015 Reuters Institute *Digital News Report*, published in June, covered 12 countries, of which 10 had also been covered in 2014, this supplementary report turns the focus to six additional countries within Europe, none of which we have examined before.

The countries covered in this report are: Poland, the Czech Republic, Austria, the Netherlands, Turkey, and Portugal. With one exception they are all countries with a relatively high level of internet access, and throw new light on some of the issues covered in the main report. Austria and the Netherlands are affluent countries that border on – and in the case of Austria share a language with – Germany, which has been one of our reference countries since the creation of the *Digital News Report* in 2012. Portugal offers us the chance to compare trends with its larger neighbour, Spain, which we have covered since 2013. Meanwhile Poland and the Czech Republic offer our first chance to look at Central European countries, and to gauge to what extent they fit within a wider European pattern of digital news use and engagement. Turkey is the exception to the pattern mentioned above. It has a lower GDP per capita than the other countries studied and lower internet access, which has obliged us to restrict the survey to an urban sample (which tends to include a wealthier, younger, and better educated sample than the population as a whole). It also has a much more polarised media environment which may affect scoring on issues of trust among other things.¹

Because we are looking at these six countries for the first time, we have no trend data to draw on and of necessity our observations on possible explanations for the differences between them are more speculative. Nevertheless we use a few comparators throughout to help put results for the six into perspective, providing figures for Germany, the UK, and Spain in all the charts shown here and on occasion an overall average of all respondents across the 18 countries polled this year. However, we fully anticipate problems born of novelty diminishing over time as we return to all these countries. These six countries represent a pilot for the larger expansion

within Europe of the main Reuters Institute *Digital News Report* which we will conduct from 2016 onwards, when we will include all these countries, and a further six European countries, alongside the existing countries covered in the main 2015 Report.

As with our main 2015 Report we continue to make efforts to open up as much of the data as possible via our website at www.digitalnewsreport.org. This contains slidepacks and charts, along with a licence that encourages reuse, subject to attribution to the Reuters Institute. Also this year, we have extended our interactive feature, which allows anyone to explore and visualise the data by themselves.

We are very grateful to Google who sponsored this additional report (and the expansion within Europe from 2016) and to all our colleagues in the countries covered here for helping us with our work on understanding the national media landscapes. We would also like to thank the sponsors and partners of the comparator countries included here from the main 2015 *Digital News Report*, and in particular the Hans Bredow Institute for Germany and the University of Navarra for Spain. As with all our publications, the responsibility for the analysis and conclusions lies with the authors and the Reuters Institute rather than our sponsor or partners.

I am also grateful to YouGov, our polling company, who worked hard to do the polling in these six countries at the same time as those for the 12 covered in the main 2015 *Digital News Report*, and delivered data and analysis in very good time for our team to work on it. Finally thanks are due to Dr Richard Fletcher, the lead researcher and author of this report for all his excellent work on it, to Damian Radcliffe who worked with Richard, to Nic Newman who as lead author of the main report created the approach which is largely followed here, and to Alex Reid, the publications officer at the Reuters Institute, for her work in ensuring the report was produced to such a high standard.

¹ Turkey also scores very low in the 2015 Reporters Without Borders Press Freedom index: 149th out of 180 countries in the index. See: <https://index.rsf.org>

METHODOLOGY

This study was commissioned by the Reuters Institute for the Study of Journalism, at the University of Oxford, 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 2015. The questionnaire was completed by over 8,000 respondents in six countries: Poland, the Czech Republic, Austria, the Netherlands, Turkey, and Portugal.










- The data were weighted to targets based on census/industry-accepted data, such as age, gender, region, newspaper readership, and social grade, to represent the total population of each country. The sample is reflective of internet users in these countries.
- 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 4% but was as high as 10% in the Netherlands.
- A comprehensive online questionnaire was designed by the Reuters Institute, in partnership with YouGov, to capture all aspects of news consumption. The same core questions were asked in all countries.
- To help us with interpretation, we compare the data from the aforementioned six countries with data from three comparator countries: UK, Germany, and Spain. The names of our comparator countries are placed within brackets on all of our charts and tables to distinguish them from the six countries that are the main focus.

- On occasion we also compare the data from our six countries to figures for all respondents from all 18 countries surveyed in 2015 as part of both this study and the main *Digital News Report* (published in June). We refer to this as our '18 country average'. The 18 countries in question are the six featured in this report (Poland, the Czech Republic, Austria, the Netherlands, Turkey, and Portugal) and the 12 featured in the main *Digital News Report* (UK, US, France, Germany, Denmark, Finland, Italy, Spain, Japan, Brazil, Australia, Ireland). At times we also refer to the country with the highest/lowest value in 2015 to give an indication of the variance.

This is an online survey – and as such the results will under-represent the consumption habits of people who are not online (typically older, less affluent consumers with limited formal education). Where relevant, we have tried to make this clear within the text. This becomes more pertinent in countries with comparatively low levels of internet penetration. Due to low internet penetration in the more rural parts of Turkey, our sample can be said to be representative of an 'urban' population, and we refer to it as such throughout the report.

The main purpose of this study, however, is to introduce the digital news landscapes in a further six countries, and to set a benchmark to track activities and changes over time within the digital space.

A fuller description of the methodology and a discussion of non-probability sampling techniques can be found on our website.

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Starting sample	2060	1049	1053	2265	1076	1086	2313	2035	2127
Non news users	2%	2%	4%	10%	3%	3%	7%	3%	5%
Final sample size	2015	1023	1009	2044	1041	1049	2149	1969	2026
Total population	38,346,279	10,627,448	8,223,062	16,877,351	81,619,392	10,813,834	63,742,977	80,996,685	47,737,941
Internet penetration	67%	78%	87%	96%	57%	65%	90%	89%	75%

Note: Turkey is representative of an urban population; rather than a national population; as such the internet penetration is likely to be higher than stated above, which must be taken into consideration when interpreting results.

Source: Internet World Stats <http://www.internetworldstats.com> internet population estimate 2014.

AUTHORSHIP AND RESEARCH ACKNOWLEDGEMENTS

Dr Richard Fletcher

Richard is a Research Fellow at the Reuters Institute for the Study of Journalism. He is primarily interested in global trends in digital news consumption, the use of social media by journalists and news organisations, and more broadly, the relationship between computer-based technologies and journalism. Richard was previously a Junior Research Fellow in the Department of Journalism at City University London. Here he worked on the development and evaluation of SocialSensor – a tool designed to allow journalists to collect, process, and aggregate large streams of social media data. Richard's original undergraduate and employment background was in computer science. Since then he has completed an MSc in Science, Medicine, Technology, and Society from Imperial College London and a PhD in Sociology from the University of Surrey.

Damian Radcliffe

Damian recently joined the University of Oregon as the Carolyn S. Chambers Professor in Journalism. He previously spent two decades in editorial, research, and policy positions at organisations such as the BBC, Ofcom, and Qatar's Ministry of Information and Communications Technology (ictQATAR). His writing and research work focuses on social media, hyperlocal and community journalism, technology and the business of media. He is a regular contributor on these matters to major media outlets such as the BBC College of Journalism, CBS Interactive (ZDNet), the Huffington Post and TheMediaBriefing. Damian is an Honorary Research Fellow at the Cardiff School of Journalism, Media and Cultural Studies; and a Fellow of the Royal Society of Arts.

Dr David A. L. Levy

David 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* (1999/2001), and joint editor with Rasmus Kleis Nielsen of

The Changing Business of Journalism and its Implications for Democracy (2010). He co-authored *The Public Appetite for Foreign News on TV and Online* (2013) and jointly edited, with Nigel Bowles and James T. Hamilton, *Transparency in Politics and the Media: Accountability and Open Government* (2013).

Dr Rasmus Kleis Nielsen

Rasmus is Director of Research at the Reuters Institute for the Study of Journalism and Editor in Chief of the *International Journal of Press/Politics*. His work focuses on changes in the news media, political communication, and the role of digital technologies in both. He has done extensive research on journalism, American politics, and various forms of activism, and a significant amount of comparative work in Western Europe and beyond. Recent books include *The Changing Business of Journalism and its Implications for Democracy* (2010, edited with David A. L. Levy), *Ground Wars: Personalized Communication in Political Campaigns* (2012), and *Political Journalism in Transition: Western Europe in a Comparative Perspective* (2014, edited with Raymond Kuhn).

Nic Newman

Nic 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.

National context and additional insight has been provided by academic partners and by our network of Journalist Fellows² around the world, particularly in providing national context on

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

our country pages. We are particularly grateful to:

- Austria: Sergio Sparviero and Josef Trappel (University of Salzburg)
- Czech Republic: Václav Štětka (Charles University in Prague)
- Netherlands: Joëlle Swart and Marcel Broersma (University of Groningen)
- Poland: Vadim Makarenko (*Gazeta Wyborcza* and former Journalist Fellow)
- Portugal: Ana Pinto Martinho and Gustavo Cardoso (ISCTE-University Institute of Lisbon), Miguel Paisana and Tiago Lima (Obercom)
- Turkey: Emre Azizlerli (BBC and former Journalist Fellow)

We are also grateful for the industry insights for our country profiles provided by Michal Klíma, Piet Bakker, Agnieszka Węglińska, Sónia Matos, and Esra Doğramaci.

Additional expert analysis and interpretation of the survey data were provided by the team at YouGov, in particular Shaun Austin, Charlotte Clifford, David Eastbury, and Alice Kerry.



EXECUTIVE SUMMARY AND KEY FINDINGS

Richard Fletcher

Our survey found that digital news is now widely used in Austria, the Czech Republic, the Netherlands, Poland, Portugal, and urban Turkey. Yet we also see evidence of the continued importance of traditional news sources. This has created a crowded news landscape, with newspaper, broadcaster, and digital-born brands competing for space and attention. At the same time, we also observe national variation in the extent to which digital news has been embraced, variation in the digital devices consumers use to access the news, as well as varying patterns of use among different demographics.

KEY FINDINGS

- We see evidence suggesting that the shift towards accessing news using mobile digital devices is happening at different speeds across Europe. Though we see moderate to high levels of smartphone and tablet news access in most of the countries examined here, we also see particularly low figures in Portugal and the Czech Republic. We also see very high levels of computer news access in these countries as well as in Poland. On top of this, in Portugal, Poland, and the Czech Republic the gap between the preference for computer news access and mobile access is much larger than in other European countries.
- Outside of Austria we see that digital-born news brands – online news sources without a print or broadcasting legacy – are reaching a comparatively large proportion of online news consumers. However, international digital-born brands favoured by audiences in many European countries – such as BuzzFeed, Vice, and the Huffington Post – have, to date, experienced limited success in the countries surveyed here. Instead, domestic, language-specific providers dominate the digital-born sector.
- On top of this, we find that social media are widely used as a news source in Poland, Portugal, and urban Turkey. Though figures are lower in Austria and the Netherlands – where traditional news sources remain popular – the use of social media for news is more widespread than in both Germany and the UK. In all countries, we see that the most popular social network for news is Facebook, followed by YouTube, Google+, and Twitter.
- All of this means that accessing online news is common in all countries surveyed. Yet traditional sources remain










important. Respondents in most countries still consider TV to be their main source of news, and in Austria we see a much stronger print focus than elsewhere. However, this picture is heavily influenced by age. In all countries, we see a strong preference for TV news access from those within older age groups, and at the same time, a clear preference for online news access from younger consumers.

- Trust in the news varies across countries. It is particularly high in Portugal, where over two-thirds agree that they can ‘trust most news most of the time’. However, trust is very low in urban Turkey, where, against the backdrop of heavy press censorship and political polarisation, nearly half say that they generally distrust the news.
- Figures for online news payment in the last year are low in most of the six countries. In some – such as the Czech Republic – this is partly due to there being free online news available from both strong digital-born sources and the majority of traditional news brands. In others – such as Austria – paying for printed news remains popular and is underpinned by high subscription figures. However, in Poland there are small signs that experiments with online paywalls and subscriptions have been successful.

SHIFT TO MOBILE NEWS ACCESS HAPPENING AT DIFFERENT SPEEDS

In many European countries, we have seen a sharp rise in the use of mobile devices – particularly smartphones and tablets – for news access. In the six countries examined here, the proportion accessing news using mobile devices is broadly in line with our data from Spain, Germany, and the UK (comparator countries from the main 2015 *Digital News Report* that we will use throughout this documents to help interpret the results). Smartphone news use is particularly common in Poland (52%), and tablet access popular in the Netherlands (25%); with high figures for both in urban Turkey (57% and 24%). By contrast, the use of smartphones and tablets is comparatively low in Portugal and the Czech Republic.

PROPORTION THAT USE EACH DIGITAL DEVICE TO ACCESS NEWS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Laptop/Desktop computer	81%	83%	67%	64%	65%	78%	59%	57%	66%
Smartphone	52%	34%	41%	42%	57%	34%	42%	34%	48%
Tablet	18%	16%	18%	25%	24%	21%	31%	16%	24%

Q8B. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply.

Base: Total sample in each country.

ALSO FROM 2015

COMPUTER FOR NEWS

HIGHEST

CZECH REPUBLIC: 83%

LOWEST

GERMANY: 57%

18 COUNTRY AVERAGE

68%

SMARTPHONE FOR NEWS

HIGHEST

AUSTRALIA: 59%

LOWEST

JAPAN: 33%

18 COUNTRY AVERAGE

45%

TABLET FOR NEWS

HIGHEST

DENMARK: 39%

LOWEST

JAPAN: 13%

18 COUNTRY AVERAGE

23%

However, perhaps the most striking aspect of the data is that, compared to our comparator countries, the proportion that access news using a laptop or desktop computer is very high in Poland (81%), Portugal (78%), and the Czech Republic (83%). These figures for computer access are well above our average figure of 68% based on data from all respondents from all 18 countries surveyed in 2015 as part of the *Digital News Report* project.

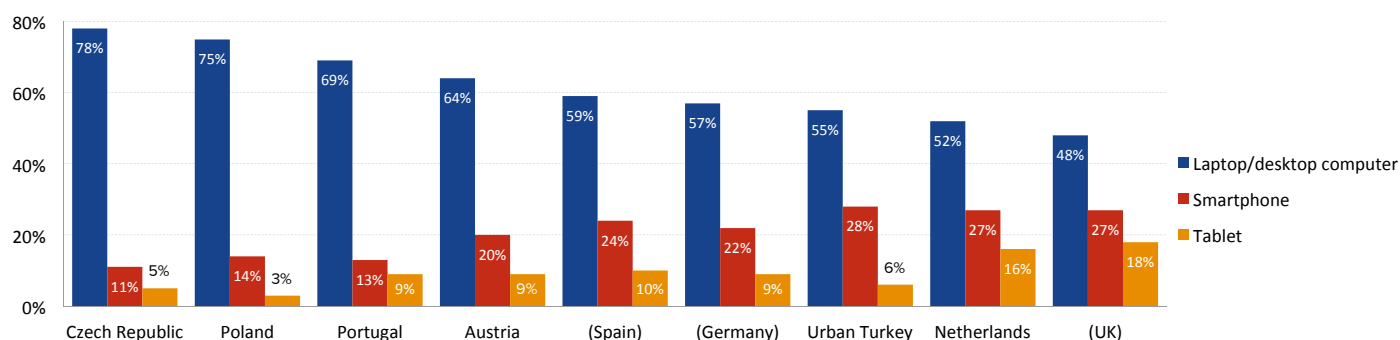
The importance of the computer is also evident in data about what respondents see as their *main* digital news device. As in every other country we have surveyed in 2015, the preference for the computer is clear. Though figures for Austria and the Netherlands are consistent with those from Germany and the UK, in Portugal, the Czech Republic, and Poland (where smartphone news use is common) the proportion that sees

the computer as their main news device is very large, and the proportion that prefers mobile devices is much smaller than in any of the other countries surveyed. This suggests that, even amongst online users, the shift to mobile news access is happening at different speeds across Europe.

Data from our survey also reveal that overall access to mobile devices is lower in Portugal, Poland, and the Czech Republic compared to our other countries. The reasons for this are multifaceted, but are likely to be linked to affluence. According to the International Monetary Fund (IMF), the Gross Domestic Product (GDP) per capita of Portugal, Poland, and the Czech Republic is comparatively low, impacting upon the affordability of owning mobile devices.³

See section 4.1 Smartphones and Tablets p. 61.

PROPORTION THAT SAID EACH DEVICE WAS THEIR MAIN DIGITAL NEWS DEVICE BY COUNTRY (ORDERED BY COMPUTER)



UK8b6_5. You've said you use the following devices to access news in the last week; which is your MAIN way of accessing online news?

Base: All who used a digital device to access news in the last week Poland = 1923, Czech Republic = 948, Austria = 854, Netherlands = 1753, Urban Turkey = 961, Portugal = 973, UK = 1795, Germany = 1554, Spain = 1819.

Note: Data for each country do not add up to 100% because the small proportion who selected another digital device as their main device for news is not shown.

³ <https://www.imf.org/external/pubs/ft/weo/2015/01/weodata/index.aspx>

ALSO FROM 2015

COMPUTER AS MAIN DEVICE

HIGHEST

CZECH REPUBLIC: 78%

LOWEST

DENMARK: 47%

18 COUNTRY AVERAGE

59%

SMARTPHONE AS MAIN DEVICE

HIGHEST

IRELAND & AUSTRALIA: 32%

LOWEST

CZECH REPUBLIC: 11%

18 COUNTRY AVERAGE

24%

TABLET AS MAIN DEVICE

HIGHEST

DENMARK: 20%

LOWEST

POLAND: 3%

18 COUNTRY AVERAGE

10%

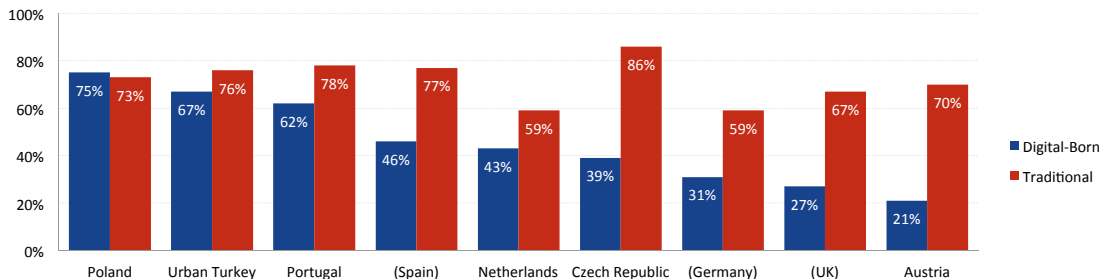
POPULAR DOMESTIC DIGITAL-BORN BRANDS

In terms of the news sources consumers access once online, it is clear that many traditional news brands have managed the online transition well; with the combined online reach of print and broadcast brands typically high. Nonetheless, the online news landscape is also marked by the presence of popular digital-born news brands; online-only news sources that do not have a print or broadcast legacy.

The combined reach of digital-born brands is particularly discernible in Poland (75%), reaching three-quarters of our sample. Digital-born brands also have a comparatively strong showing in Portugal (62%) and urban Turkey (67%). However, in Austria (21%) digital-born brands have the smallest reach of any of the 18 countries we have surveyed in 2015.



COMBINED ONLINE REACH OF DIGITAL-BORN AND TRADITIONAL NEWS BRANDS BY COUNTRY (ORDERED BY DIGITAL-BORN)



Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample in each country.

ALSO FROM 2015

DIGITAL-BORN

HIGHEST

POLAND: 75%

LOWEST

AUSTRIA: 21%

18 COUNTRY AVERAGE

47%

TRADITIONAL ONLINE

HIGHEST

FINLAND: 88%

LOWEST










JAPAN: 47%

18 COUNTRY AVERAGE

69%

If we look at a list of the most popular digital-born brands in each country, we see that, in contrast to many European countries, the popularity of the digital-born group is underpinned by the presence of at least one news source that is used by more than a quarter of all online users. Furthermore, outside of Austria – where Google News is on top – the most popular digital-born news brands are not international players such as the Huffington Post, Yahoo, or MSN, but rather language-specific, domestic sources offering news with a national focus. This diverse range of news sources includes both 'first wave' web portals that have expanded into news provision – such as Onet (48%) in Poland, Mynet (26%) in Turkey, and SAPO (26%) in Portugal – as well as dedicated news platforms – such as Aktuálně (31%) in the Czech Republic and Nu.nl (34%) in the Netherlands.

MOST POPULAR DIGITAL-BORN NEWS BRANDS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
First	48% Onet	31% Aktuálně	12% Google News	34% Nu.nl	26% Mynet	26% SAPO	12% Huffington Post	13% T-Online	15% Google News
Second	40% WP	12% Super	5% Yahoo News	6% Google News	21% Haberler	23% Notícias ao Minuto	8% Yahoo News	11% Google News	10% El Confidencial
Third	26% Interia	6% Google News	4% MSN News	6% MSN News	21% Internethaber	17% Google News	6% Google News	6% Huffington Post	9% MSN News

Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)










Base: Total sample in each country.

Note: Domestic digital-born brands are marked in red.

International digital-born brands that produce or repackage news content – such as the Huffington Post, Vice, and BuzzFeed – are used by 2% or fewer in each country. However, amongst 18–24 year olds the proportion using international brands is generally higher, and closer to what we see in other European countries. Though these brands do produce localised content for some markets, they have not

specifically targeted the countries examined here. This is likely to be a result of the relatively small market sizes associated with particular languages and locations.⁴ News aggregators – such as MSN and Yahoo – typically fare slightly better, but are still some way behind domestic brands. Google News is the most popular news aggregator, with relatively widespread use outside of the Czech Republic and the Netherlands.

PROPORTION THAT USE SELECTED INTERNATIONAL DIGITAL-BORN BRANDS FOR NEWS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Huffington Post	1%	0%	2%	1%	2%	2%	12%	6%	8%
BuzzFeed	1%	0%	1%	1%	2%	1%	5%	1%	1%
Vice	-	0%	1%	1%	2%	1%	1%	1%	1%
Yahoo News	3%	0%	5%	1%	5%	2%	8%	5%	8%
MSN News	-	0%	4%	6%	13%	9%	5%	4%	9%
Google News	12%	6%	12%	6%	15%	17%	6%	11%	15%

Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample in each country.

Note: We did not ask respondents about Vice or MSN use in Poland.

See section 1.7 Comparative Brand Analysis p. 38.

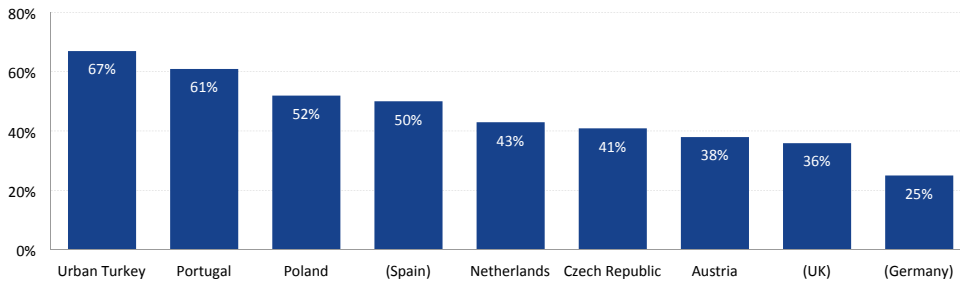
SOCIAL MEDIA A POPULAR SOURCE OF NEWS

On top of the popularity of digital-born brands, social media are also widely used as a news source in the six countries examined here. In urban Turkey (67%), Portugal (61%), and Poland (52%), the proportion using social media as a source

of news – via social networks such as Facebook, YouTube, Google+, and Twitter – is well above our 18 country average of 44%. Though the proportion using social media as a source of news is lower in the Netherlands (43%), Austria (38%), and the Czech Republic (41%) – where we see a preference for traditional news brands – these figures are nonetheless well above our figure of 25% for neighbouring Germany.

⁴ There are German-language versions of the Huffington Post, Vice, and BuzzFeed available in Austria, but these sites do not specifically target an Austrian audience.

PROPORTION THAT USE SOCIAL MEDIA AS A SOURCE OF NEWS BY COUNTRY



Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.
Base: Total sample in each country.

ALSO FROM 2015

SOCIAL MEDIA FOR NEWS

HIGHEST

URBAN TURKEY: 67%

LOWEST

JAPAN: 21%

18 COUNTRY AVERAGE

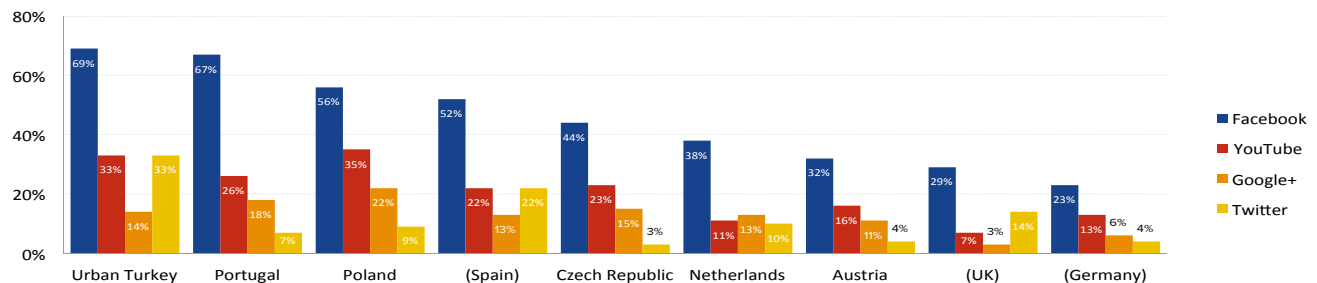
44%

FACEBOOK: THE DOMINANT SOCIAL NETWORK FOR NEWS

If we consider all activities surrounding the news – including finding, reading, watching, sharing, and discussing – Facebook is by far the most popular social network everywhere, followed by YouTube, Google+, and Twitter. Twitter and YouTube news use is very high in urban Turkey (both 33%), with the figure

for Twitter use the highest out of the 18 countries surveyed in 2015. In Turkey, largely unsuccessful attempts have been made to block access to both Twitter and YouTube because of the ease with which they can be used to publish alternative views. Elsewhere Twitter news use is comparatively low, even in countries such as Portugal (7%) and Poland (9%), where overall social media use is high.

PROPORTION THAT USE EACH SOCIAL NETWORK FOR NEWS BY COUNTRY (ORDERED BY FACEBOOK)



Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.
Base: Total sample in each country.

ALSO FROM 2015

FACEBOOK FOR NEWS

HIGHEST

URBAN BRAZIL: 70%

LOWEST

JAPAN: 11%

18 COUNTRY AVERAGE

43%

YOUTUBE FOR NEWS

HIGHEST

POLAND: 35%

LOWEST

UNITED KINGDOM: 7%

18 COUNTRY AVERAGE

19%

GOOGLE+ FOR NEWS

HIGHEST

POLAND: 22%

LOWEST

UNITED KINGDOM: 3%

18 COUNTRY AVERAGE

10%

TWITTER FOR NEWS

HIGHEST

URBAN TURKEY: 33%

LOWEST

CZECH REPUBLIC: 3%

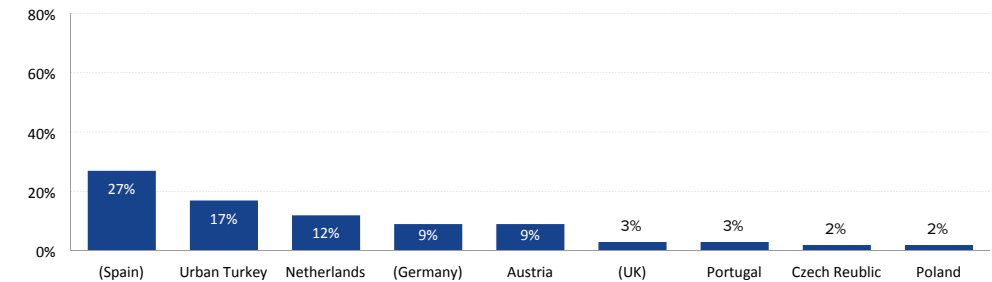
18 COUNTRY AVERAGE

11%

Typically sitting just below the top four social networks is WhatsApp, a (predominantly) mobile messaging app with over 800 million global users. WhatsApp is now emerging as a news destination, and is increasingly used by news

organisations for news gathering. However, WhatsApp news use varies quite sharply from country to country, with use particularly low in Poland (2%), Portugal (3%), and the Czech Republic (2%).

PROPORTION THAT USE WHATSAPP AS A SOURCE OF NEWS
BY COUNTRY



Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.
Base: Total sample in each country.

ALSO FROM 2015

WHATSAPP FOR NEWS

HIGHEST

URBAN BRAZIL: 34%

LOWEST

US, JAPAN & DENMARK: 1%










18 COUNTRY AVERAGE

9%

A number of smaller social networks are also seeing broadly similar levels of news use from 18–24s in countries where social media are prevalent. Instagram is comparatively popular in Portugal (9%) and urban Turkey (12%), and Snapchat is

popular in Poland (4%). However, use of these social networks is small (typically less than 2%) when we consider all age groups.

PROPORTION OF 18–24S THAT USE EACH SOCIAL NETWORK FOR NEWS
BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Instagram	6%	5%	3%	4%	12%	9%	5%	5%	8%
Tumblr	4%	1%	2%	4%	2%	4%	5%	1%	2%
Reddit	3%	0%	4%	3%	2%	2%	5%	2%	3%
Snapchat	4%	2%	1%	2%	4%	2%	2%	1%	2%

Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.
Base: 18-24s Poland = 249, Czech Republic = 107, Austria = 109, Netherlands = 222, Urban Turkey = 203, Portugal = 108, UK = 228, Germany = 170, Spain = 186.

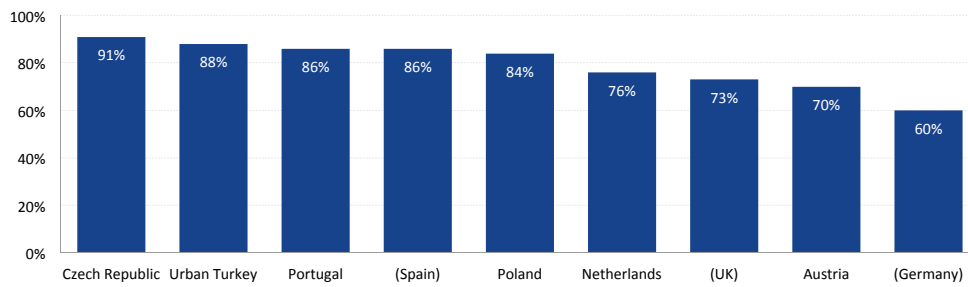
See section 4.3 Social Media, p.65.

ONLINE NEWS ACCESS POPULAR,
BUT TRADITIONAL SOURCES STILL
IMPORTANT

If we take a step back from considering the online news environment in isolation, we can also use our data to see how online fits into the news landscape as a whole. As a result of the popularity of social media and digital-born platforms, we see that a comparatively high proportion are using online news sources in most countries. Figures are particularly high in Portugal (86%), urban Turkey (88%), and the Czech Republic (91%), where we see figures well above our 18 country average of 80%. Even in countries where traditional sources remain popular – such as Austria (70%) and the Netherlands (76%) – we still see high levels of online news access compared to Germany (60%).










Yet, despite these high figures, online does not dominate other more traditional news sources. It is clear that news consumption is typically spread across multiple sources. We see levels of TV news use broadly matching online. Printed newspapers also remain remarkably popular in Austria. Here, two-thirds (67%) of our sample used a printed newspaper in the last week – nearly 20 percentage points higher than in any other country we surveyed in 2015. On top of this, it should also be acknowledged that in all cases our use of an online sample is likely to have overestimated the use of online news sources, and understated the use of traditional.

PROPORTION THAT USE ONLINE NEWS BY COUNTRY



Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.
Base: Total sample in each country.

PROPORTION THAT USE EACH AS A SOURCE OF NEWS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
TV	81%	85%	78%	80%	75%	85%	75%	82%	82%
Radio	44%	35%	49%	48%	32%	42%	37%	50%	40%
Printed Newspapers	22%	33%	67%	40%	47%	39%	38%	38%	47%
Online (inc. social media)	84%	91%	70%	76%	88%	86%	73%	60%	86%

Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.
Base: Total sample in each country

ALSO FROM 2015

TV

HIGHEST

CZECH REPUBLIC &
PORTUGAL: 85%

LOWEST

US: 64%

18 COUNTRY AVERAGE

77%

ONLINE (INC. SOCIAL)

HIGHEST

CZECH REPUBLIC & URBAN
BRAZIL: 91%

LOWEST

GERMANY: 60%

18 COUNTRY AVERAGE

80%

PRINTED NEWSPAPERS

HIGHEST

AUSTRIA: 67%

LOWEST

FRANCE: 19%

18 COUNTRY AVERAGE

37%

RADIO

HIGHEST

GERMANY: 50%

LOWEST

JAPAN: 17%

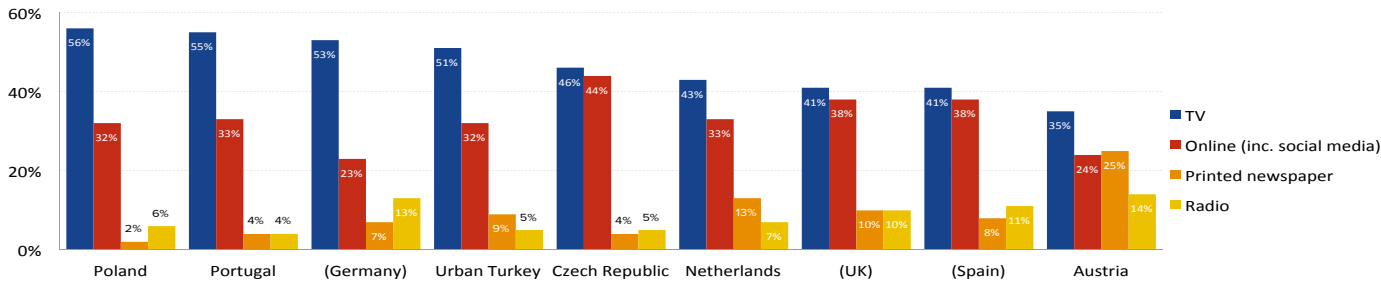
18 COUNTRY AVERAGE

38%

Respondents in all countries other than the Czech Republic clearly still see TV as their main source of news, even amongst our online sample. Everywhere other than Austria, online is in second place ahead of printed newspapers and radio. The gap

between TV and online is large in Poland, Portugal, and urban Turkey, but elsewhere online is close behind. Fewer than 1 in 20 in Poland (2%), Portugal (4%), and the Czech Republic (4%) see printed newspapers as their main news source.

PROPORTION THAT SAID EACH SOURCE WAS THEIR MAIN SOURCE OF NEWS
BY COUNTRY (ORDERED BY TV)

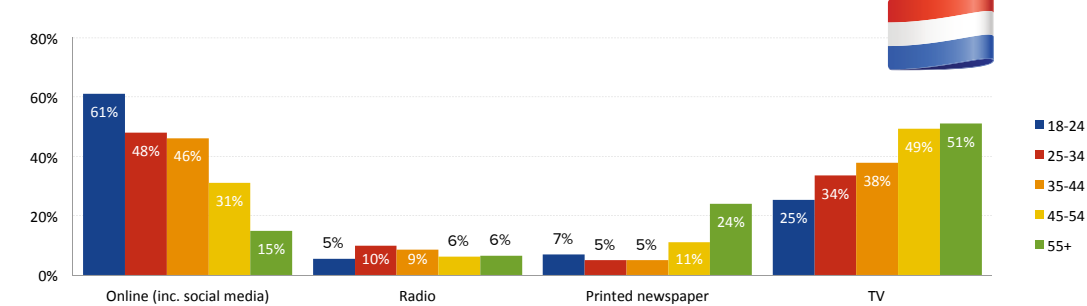


Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?
Base: All who used a source of news in the last week Poland = 1995, Czech Republic = 1017, Austria = 1001, Netherlands = 2017, Urban Turkey = 1034, Portugal = 1041, UK = 2105, Germany = 1943, Spain = 2014.
Note: Data for each country do not add up to 100% because the small proportion who selected another source as their main source of news is not shown.

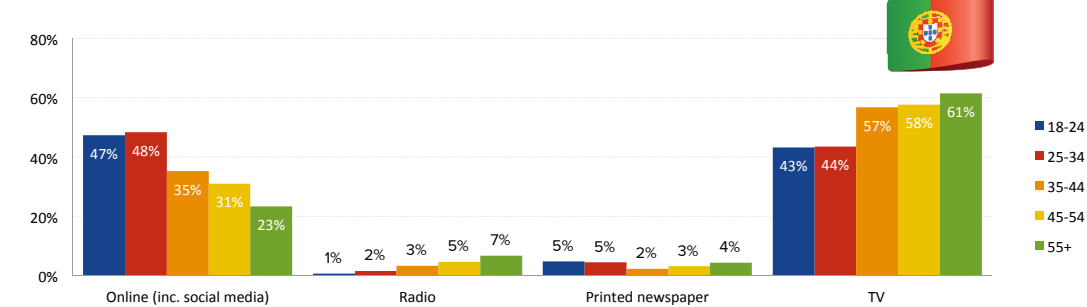
This picture is heavily influenced by age. We see sharp divides between different age groups in terms of main source of news. In every country younger respondents favour online sources,

whereas older respondents prefer TV. Radio and printed newspapers are comparatively less preferred across all age groups.

PROPORTION WITHIN EACH AGE GROUP THAT SAID EACH SOURCE WAS THEIR MAIN SOURCE OF NEWS
NETHERLANDS



PORTUGAL



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?
Base: 18-24s/25-34s/35-44s/45-54s/55+ that used a source of news in the last week Netherlands = 221/273/345/386/792, Portugal = 107/198/209/187/340.
Note: Data do not add up to 100% because the small proportion who selected another source as their main source of news are not shown.

A small proportion of younger consumers – roughly 15% of 18–24 year olds in each country – *only* use online news sources. Of course, this also means that the majority are spreading their news consumption across both online and traditional sources. Nonetheless, this raises questions about how the age profile for each news source will change in the coming years.

See section 2.1 Sources of News p. 47.

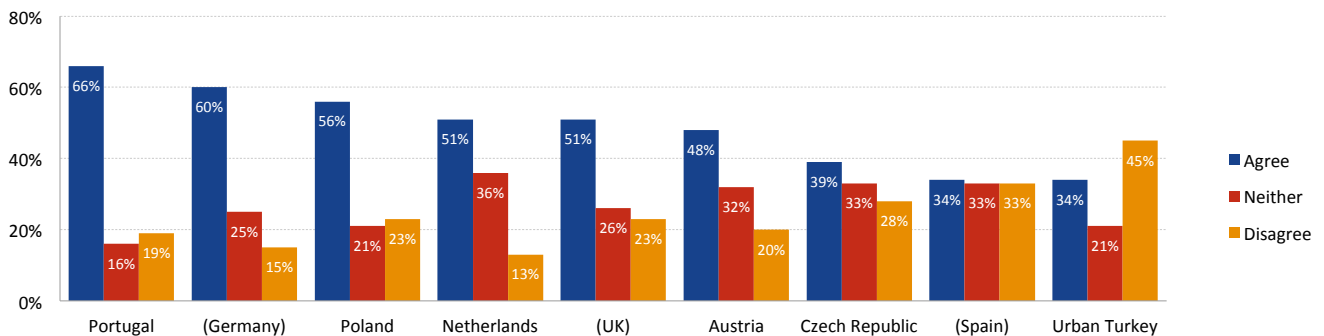
VARIED LEVELS OF TRUST IN THE NEWS

We see large variations in terms of trust in the news. Trust in the news is above our 18 country average in Poland (56%), the Netherlands (51%), and particularly in Portugal (66%), where the proportion who agree that they can ‘trust most news most of the time’ is just 2 percentage points lower than our highest 2015 figure of 68% in Finland.

By contrast, in urban Turkey 45% do not think that they can ‘trust most news most of the time’; a figure 11 percentage points greater than our second highest figure of 34% in the US. Though this is likely to be partly due to our urban sample, it also reflects the high degree of political polarisation evident in the Turkish media. On top of this, the news is also subject to censorship, as evidenced by Turkey’s ranking of 149th out of 180 in the 2015 Reporters Without Borders Press Freedom Index.⁵

See section 2.3 Trust in the News p. 52.

PROPORTION THAT AGREE/DISAGREE THAT THEY ‘TRUST MOST NEWS MOST OF THE TIME’ BY COUNTRY (ORDERED BY AGREE)



Q6A. Thinking about news in general, do you agree or disagree with the following statement? ‘I think you can trust most news most of the time’
Base: Total sample in each country.

Note: Figures for agree/disagree were calculated by combining the proportion that selected ‘strongly’ or ‘tend to’ agree/disagree.

ALSO FROM 2015

AGREE

HIGHEST

FINLAND: 68%

LOWEST

UNITED STATES: 32%

18 COUNTRY AVERAGE

48%

DISAGREE

HIGHEST

URBAN TURKEY: 45%

LOWEST

JAPAN: 11%

18 COUNTRY AVERAGE

24%

⁵ <https://index.rsif.org>

FEW PAY FOR ONLINE NEWS, BUT SIGNS OF SUCCESS IN POLAND

The proportion of respondents who paid for online news content during the last year is, in some cases, very low. In Austria, where print sales are still very strong and consumers are able to access online news from German-language sources, just 1 in 20 paid for online news in the last year; the lowest figure of all 18 countries surveyed in 2015. Payment figures were also low in Portugal (7%) and the Czech Republic (7%). Outside of Poland and the Netherlands, most news websites – including those of traditional news brands – do not currently charge for access. There is little incentive or precedent for users to pay to access online news, so low figures are to some extent unsurprising.

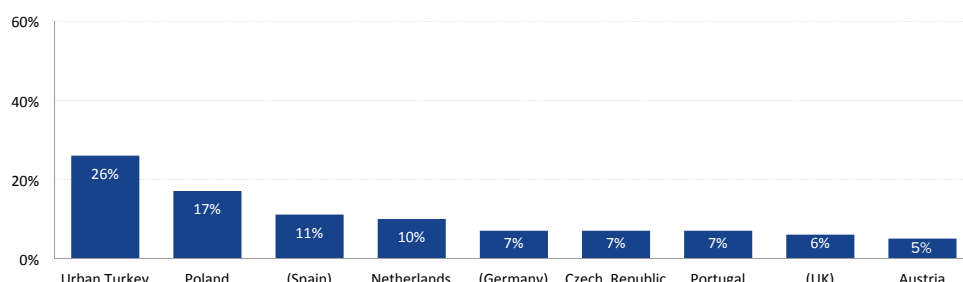
We did see comparatively high figures in both Poland (17%) and urban Turkey (26%). However, the Turkish figure is probably inflated by our more affluent urban sample. What is more, at least half of all those who said they had purchased online

news had paid a small one-off fee (or micropayment) for access to an electronic copy of a single newspaper or article. Only in the Netherlands are ongoing subscription payments more common. This means that, despite some of the high top-level figures, online revenue for publishers is likely to be low.

There are, however, possible indications that publishers have been more successful in Poland. Following a decision by some of Poland's leading print publishers in 2012 to join the Piano Media aggregate digital subscription system, Poland is now able to boast comparatively large online news subscription figures. Their 'national' paywall system enables consumers to subscribe and access content from around 45 participating news sources with one payment and one login. The system has over 50,000 digital subscribers in Poland, but time will tell as to whether this model proves to be successful.

See section 3.2 Paying for Online News p.57.

PROPORTION THAT PAID FOR ONLINE NEWS IN THE LAST YEAR BY COUNTRY



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

ALSO FROM 2015

PAID FOR ONLINE NEWS

HIGHEST

URBAN TURKEY: 26%

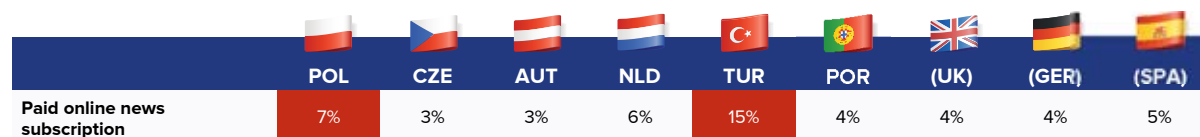
LOWEST

AUSTRIA: 5%

18 COUNTRY AVERAGE

11%

PROPORTION THAT PAID FOR AN ONGOING NEWS SUBSCRIPTION IN THE LAST YEAR BY COUNTRY



Q7ai. You said you have accessed paid for ONLINE news content in the last year... Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? Please select all that apply.
Base: Total sample in each country.

1 ANALYSIS BY COUNTRY

In this section we publish a series of the detailed data tables from our 2015 survey. We start with a country-based view of the findings, which includes an overview of media characteristics and the most important data points in terms of digital news.

This includes an overview of consumption in each country, including details of the most popular news brands – traditional and online. The pages also contain statistics about the use of new devices such as smartphones and tablets and the role of different social networks for news. All information is drawn from the 2015 *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*.

Whilst Austria and the Netherlands have internet penetration rates over 80%, and Poland, Portugal, and the Czech Republic have been between 65 and 80%, Turkey in particular has much lower levels of access (57%). Here, we are looking at the habits of just over half the adult population. It should also be noted that the Turkish sample is an urban-based sample (and skews far younger compared to the other countries surveyed). Many international comparisons will still be relevant in terms of understanding differences in the online sphere, but anyone interpreting these results should be careful not to suggest these figures represent the total adult population, especially when considering offline versus online consumption.

Figures around digital and cross-platform reach are derived from the tagging of a list of specific news sources (online and offline) – around 40 per country. This method will tend to under-report the long tail of sources.

In subsequent sections we explore the key parts of our survey illustrated by more detailed charts and tables alongside commentary to explain their significance.

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

Section 1 Analysis by Country

1.1	Austria
1.2	Czech Republic
1.3	Netherlands
1.4	Poland
1.5	Portugal
1.6	Turkey
1.7	Comparative Brand Analysis

AUSTRIA

STATISTICS

Population:	8m
Internet:	87%
Interest in news:	64%
Trust in news:	48%

Various segments of the media market in Austria are characterised by the presence of one largely dominant player. ORF (Österreichischer Rundfunk) is the public broadcaster and was the only provider of terrestrial television channels until regulation changed in 2001.⁶ Its range of channels include ORF II and III, which are the more traditional services, and ORF I, which targets younger audiences and competes directly with private commercial companies such as Puls 4, ATV, and Servus TV.

All of these providers live in a multi-channel world where over 90% of television viewers have access to a large variety of international channels (including German-language channels such as ARD, ZDF, SRG and RTL, Pro7, Sat1, etc.) via cable, satellite, or internet services.

The national radio market is primarily characterised by the competition between Hitradio Ö3, the ORF radio channel for the younger audience, and KroneHit, the channel belonging to the same group that publishes the popular daily newspaper *Kronen Zeitung*.

The latter is a tabloid that dominates the national market with a share of over 30%. *Kurier*, *Der Standard*, *Die Presse*, *Wiener Zeitung*, and two free national newspapers, *Heute* and *Österreich*, are the competing brands. The regional newspaper markets are highly concentrated and characterised by the presence of just one dominant provider: *Kleine Zeitung* (in Styria and Carinthia), *Tiroler Tageszeitung* (in Tyrol), *Oberösterreichische Nachrichten* (in Upper Austria), *Salzburger Nachrichten* (in Salzburg), and *Vorarlberger Nachrichten* (Vorarlberg). These regional newspapers sell similar numbers of copies to some of the main brands in the national market.⁷

Since the Second World War, the Austrian daily press has experienced two major waves of market concentration. The first occurred when the formerly strong party press disappeared in

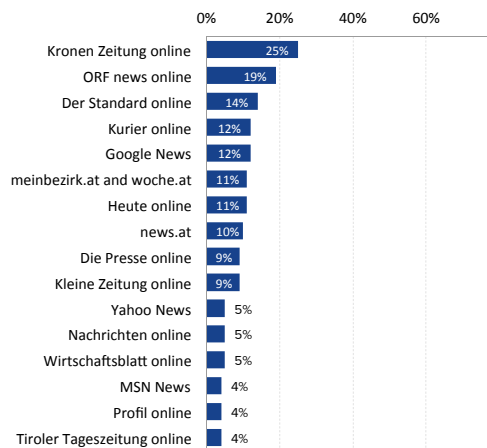


TOP BRANDS

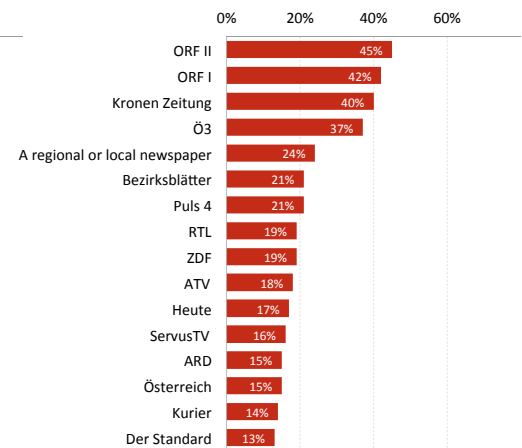
% WEEKLY USAGE



ONLINE⁸



TRADITIONAL (TV, RADIO AND PRINT)



TRADITIONAL (OFFLINE) REACH

Newspapers: 84%
Broadcasters: 89%

DIGITAL REACH

Newspapers: 64%
Broadcasters: 23%
Digital-born: 21%

CROSS-PLATFORM REACH

Newspapers: 91%
Broadcasters: 91%

the 1970s. The second took place in the 1980s and early 1990s when German press companies invested in Austria and several secondary papers were closed down. Since then, consolidated print markets experienced little change, with the launch of the (predominantly) Viennese free-sheet *Heute* and the tabloid (mostly free) newspaper *Österreich* being the only significant exceptions. Digital-born media companies have had no significant market impact. They are small and struggle for survival in their market niches.

RECENT INDUSTRY DEVELOPMENTS

ORF broadcasts a variety of different news bulletins, of varying length and at different times of day, but which are all branded *Zeit im Bild (ZIB)*. ORF I airs the shorter editions of *ZIB* from late afternoon into late evening, while ORF II airs longer news bulletins throughout the day, as well as regional editions.

The newspaper market has seen competition from digital news websites and apps, as well as the launch of free-sheets. Despite these changes, Austrian consumers remain broadly loyal to the print editions of their daily national and local newspapers, although market leader *Kronen Zeitung* lost one-quarter of its circulation between 1995 and 2012.⁹ However, it remains, by far, the most read newspaper in the country.

Many newspapers benefit from the relatively high proportion of copies sold through subscriptions, which can typically amount to 75% of copies sold by the leading brands according

to data from the Austrian Circulation Control (Österreichische Auflagenkontrolle). While the news audience share of German broadcasters (such as ARD, ZDF, and RTL) is relatively important, the penetration rate of German newspapers in Austria is negligible.

RECENT DEVELOPMENTS IN DIGITAL NEWS

The largest national and local newspapers are also the main providers of digital news, providing free, unrestricted access to current and archived content. ORF is also an important provider of free digital news and the most accessed cluster of online services delivering editorial content, according to the association of online providers and advertising agencies ÖWA (Österreichische Webanalyse). However, access to its video archives is restricted by regulation.

The websites of the weekly magazine *News* and international aggregators – Google News, Yahoo News, and MSN – are also relatively popular, whereas the impact of the domestic digital-born players is insignificant.

The ongoing popularity of traditional news media, as well as content from ORF and international aggregators, means paid digital news consumption is relatively low. A lack of subscription offers combining print and digital editions is also likely to have contributed to this.

⁶ http://ejc.net/media_landscapes/austria#link_65

⁷ World Press Trends, <http://www.wptdatabase.org>; <http://krantenstatistiek.tumblr.com/post/44053538089/kronen-zeitung-the-market-leader-in-austrian-lost>

⁸ Our survey provides a different perspective on access to online brands than the Österreichische Webanalyse (ÖWA). ÖWA tracks the website usage of a variety of different organisations that voluntarily participate in its data collection. According to the data published on <http://oewa.at> (referring to the month of Feb. 2015) the cluster of services offered by the ORF.at network reached 8,426,076 unique clients, while standard.at and krone.at reached 4,185,523 and 3,077,634 unique clients respectively. Therefore, the data supplied by ÖWA seem somehow to contradict our results. The reader should note that our data are based on recall, and different methods are likely to produce different results. Furthermore, the respondents to our survey are specifically asked to identify the brands accessed in order to acquire news. Therefore, services such as Ö3 or FM4 might have not been identified as sources of news and/or as part of the brand ORF.at network.

⁹ World Press Trends, <http://www.wptdatabase.org>; <http://krantenstatistiek.tumblr.com/post/44053538089/kronen-zeitung-the-market-leader-in-austrian-lost>; <http://krantenstatistiek.tumblr.com/post/44053538089/kronen-zeitung-the-market-leader-in-austrian-lost>

TOP SOCIAL NETWORKS*

1. FACEBOOK	32%
2. YOUTUBE	16%
3. GOOGLE+	11%
4. WHATSAPP	9%
5. TWITTER	4%

*Used in the last week for news



DIGITAL PARTICIPATION

23% shared a news story via email or social media.

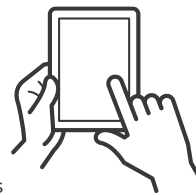


20%

say the smartphone is the main way of accessing online news

9%

say the tablet is the main way of accessing online news



5%

paid for online news in the last year



SOCIAL MEDIA AND PARTICIPATION

Access to digital news has generated tensions between the public broadcaster, ORF, and the Austrian Newspaper Association (VÖZ).¹⁰ At the core of these conflicts is the availability of the public broadcaster's digital archives and its use of social media.¹¹

Following the request of the latter, the communication regulator (KommAustria) instructed ORF to withdraw from social media in 2012. This dispute was finally resolved by the constitutional court in 2014.

That said, this dispute did not affect the personal websites and social media pages of ORF journalists. Most prominent among them is the Facebook page and Twitter account of Armin Wolf, the news anchor of the *ZIB2* bulletin. With over 196,000 'likes', his Facebook page¹² is more popular than any official ORF-branded page.

Sergio Sparviero and Josef Trappel (University of Salzburg)

¹⁰ Ibid. <http://merlin.obs.coe.int/iris/2012/3/article9.en.html>; K. Sarikakis, 'We are All Greeks' in *Texte 9: Public Service Media in Europe* (Vienna: ORF, 2013), 4–9: http://zukunft.orf.at/rte/upload/texte/2013/texte/texte_9.pdf

¹¹ J. Trappel, 'Taking the Public Service Remit Forward across the Digital Boundary' (2014) <http://ripeat.org/wp-content/uploads/tdomf/3628/Trappel%20RIPE%20paper%202014.pdf>

¹² <https://www.facebook.com/arminwolf.journalist>

CZECH REPUBLIC

STATISTICS

Population:	10.5m
Internet:	78%
Interest in news:	44%
Trust in news:	39%

The Czech media market is dominated by television, which attracts nearly half of the country's total advertising expenditure. The leading market player for the past two decades has been the CME-owned private station TV Nova, although its market share has nearly halved since its launch 20 years ago. Currently, TV Nova's market share is 34%, followed by the public broadcaster Česká televize with 29%. The other key commercial television broadcaster FTV Prima has 20% of the market. The process of digitalisation of television broadcasting (completed in 2012) has not led to the emergence of any other significant TV players, as many new digital channels have been established by existing broadcasting companies; both commercial and public service.

The newspaper sector is characterised by a high degree of concentration. The daily newspaper market is largely divided between three companies: MAFRA (publisher of two quality dailies), the Czech News Centre (publishing two tabloids and a sport newspaper), and Vltava-Labe-Press, which has a near-monopoly on the local newspaper market.¹³

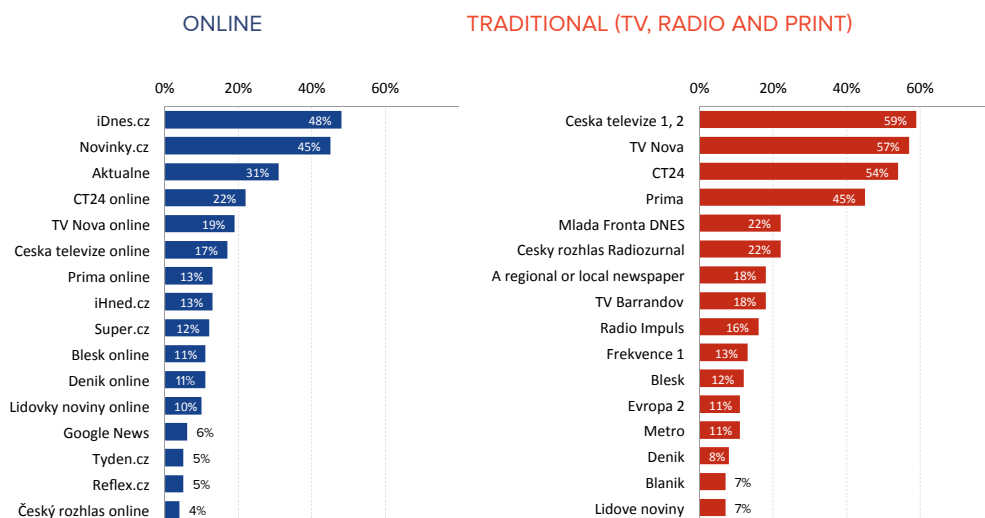
Even though the pressure towards market consolidation has grown since the recession, the current situation also has roots in the lack of appropriate anti-concentration legislation; a direct consequence of a very liberal regulatory framework which has defined the Czech media system ever since the country's political and economic transition after 1989.

The arrival of digital media has, so far, not dramatically altered the existing market structure, as the majority of significant online news platforms are largely part of the traditional media companies. New independent digital projects have recently been emerging, but most of them have limited reach and they face an uncertain future in terms of their long-term financial sustainability.



TOP BRANDS

% WEEKLY USAGE



TRADITIONAL (OFFLINE) REACH

Newspapers: 57%
Broadcasters: 93%

DIGITAL REACH

Newspapers: 75%
Broadcasters: 47%
Digital-born: 39%

CROSS-PLATFORM REACH

Newspapers: 85%
Broadcasters: 94%

RECENT INDUSTRY DEVELOPMENTS

A significant part of the Czech media market has undergone a process of ownership transformation, following the withdrawal of foreign investors who dominated most local market segments from the mid-1990s onwards. During 2013–14 the two largest publishing houses, MAFRA (owned by the Rheinische Post) and Ringier Axel Springer CZ, were acquired by local businessmen; MAFRA by Andrej Babiš and Ringier Axel Springer by Daniel Křetínský.¹⁴ Babiš, who is currently the Deputy Prime Minister and Minister of Finance in the Czech government, also purchased the leading commercial station Radio Impuls from the German-based Eurocast group in 2014, thereby becoming the most influential Czech media owner. This has raised concerns about undue concentration of media, business, and political power.¹⁵

To date, these ownership changes have not had a significant impact on the market position of these outlets, or on the patterns of news media use. The newspaper market has recently been declining at a steady rate of around 10% per year, with a near 50% drop in total circulation over the past 10 years.¹⁶ The market leader is the tabloid *Blesk*, followed by the broadsheet paper *Mladá fronta DNES* (published by MAFRA); however, broadsheet dailies still edge tabloid papers in combined circulation.¹⁷

Despite the growing use of online news portals, the main national television networks are the primary source of news for the majority of the population. Although commercial broadcasters – TV Nova in particular – control the largest portion of the television market, the public service broadcasters Česká televize as well as Český rozhlas, are generally perceived as more professional than their commercial counterparts, and also as relatively politically independent.

RECENT DEVELOPMENTS IN DIGITAL NEWS

The Czech digital news market is largely dominated by players with a strong position offline. Of the leading online news brands, only Aktualne.cz can be described as a true digital-born player, without any print or television background, even though it is owned by the Economia group, one of the main publishers in the country. Both market leaders, iDNES.cz and Novinky, serve as online platforms of daily newspapers, *Mladá fronta DNES* and *Právo*, respectively.

Television broadcasters have a significant presence as online news providers. The absence of the international brands can be attributed to the limited size and language specificity of the Czech market, which has also been one of the few European

¹³ V. Štětko, *The Czech Republic: A Country Report for the ERC-Funded Project on Media and Democracy in Central and Eastern Europe* (2012). http://mde.politics.ox.ac.uk/images/stories/documents/czech%20republic%20report_updated_aug12_final.pdf

¹⁴ <http://www.ft.com/cms/s/0/336eadaa-2f87-11e4-83e4-00144feabdc0.html>

¹⁵ <http://en.ejo.ch/media-politics/media-ownership-newsroom-change-czech-republic> J. Zatloukal, *Flaws in the Czech Political Culture* (Oxford: Reuters Institute for the Study of Journalism, 2014). <http://reutersinstitute.politics.ox.ac.uk/publication/flaws-czech-political-culture>

¹⁶ <http://www.bbc.co.uk/news/world-europe-17220321>

¹⁷ These figures, however, need to be understood in the context of the number of people who read particular titles. <http://www.newspaperinnovation.com/index.php/2012/06/19/czech-republic-readers-per-copy>

markets where Google faces stiff competition from domestic search engine Seznam.cz.

The majority of online news content is still offered for free. The publishing house Economia was the first among the big players to erect a partial paywall on their online news platform iHNed.cz in 2014, allowing the readers to access 10 articles a month for free.¹⁸

There are several new significant online projects. The new publishing house Tablet Media is focused on publishing solely for tablet and smartphone users. Established in 2013, it launched a weekly magazine *Dotyk* (The Touch) followed by a business weekly and two lifestyle monthlies. Other examples include Echo24 and the web portal of the new independent monthly Reporter. These projects were established by journalists and managers who left newsrooms that had recently changed ownership, as part of an effort to create independent alternatives to old media.

Over half of the Czech population currently owns a smartphone, a tablet, or both, and coverage for LTE high-speed (approaching 4G) mobile internet has grown significantly in the

last year.¹⁹ LTE now covers over 90% of Czech households, a figure among the highest in the EU. However, the low figures for reading news via a tablet or smartphone may relate to a slow take-up of these networks and relatively high mobile operator fees.

SOCIAL MEDIA AND PARTICIPATION

Facebook is by far the most popular social network in the Czech Republic in terms of news access (44%). Twitter lags behind significantly (3%) and largely remains a medium of the elite, particularly opinion leaders, celebrities, and journalists, some of which have greater reach via their Twitter followers than their news platforms.

Twitter is also increasingly used to break news that is then picked up by the mainstream media. Facebook, on the other hand, serves mainly as a discussion platform for the readers of online news sources.

Václav Štětka (Charles University in Prague)

TOP SOCIAL NETWORKS*

1. FACEBOOK	44%
2. YOUTUBE	23%
3. GOOGLE+	15%
4. TWITTER	3%
5. WHATSAPP	2%

*Used in the last week for news



DIGITAL PARTICIPATION

37% shared a news story via email or social media.



11%

say the smartphone is the main way of accessing online news

5%

say the tablet is the main way of accessing online news



7%

paid for online news in the last year



¹⁸ <http://www.digitalinnovationeurope.eu/economia-traditional-publisher-successfully-made-transition-digital>

¹⁹ http://press.ihs.com/sites/ihs.newshq.businesswire.com/files/LTE_Coverage_Households_2014_-_IHS_Technology.png

NETHERLANDS

STATISTICS

Population:	17m
Internet:	96%
Interest in news:	57%
Trust in news:	51%

The Dutch media market is characterised by a diverse public broadcasting system, a range of commercial broadcasters, a highly concentrated print sector, and a growing number of digital-born players. During most of the twentieth century, news outlets defined themselves either along political, religious, or social lines; or as neutral. Although these characteristics are to some extent still recognisable, recent decades have resulted in the homogenisation of legacy media. Professionalism has largely replaced ideology.

The 10 national public broadcasters receive airtime on three public TV and six radio channels based on to the number of members they have and the programmes they offer. In addition, a range of regional and local public broadcasters offers daily news. Commercial broadcasting has been permitted since 1989. SBS and RTL have the biggest market share, offering various channels, whilst cable subscriptions offer a broad range of international stations. The widespread adoption of digital TV and radio has further broadened the range of available channels.²⁰

The Dutch newspaper market is highly concentrated.²¹ Belgian publishing house De Persgroep owns three national newspapers and a chain of regional newspapers, totalling 45% of the newspaper market. Two other Belgian publishers (Concentra and Corelio) own, partly through their joint venture Mediahuis, two national and two regional newspapers, and have a total market share of almost 11%. One of its shareholders has also acquired Telegraaf Media Groep (TMG) – publisher of popular daily *De Telegraaf*, regional papers, and free newspaper *Metro* – and has a 35% market share.²² The Dutch newspaper market is mostly based on a subscription model.

²⁰ http://ejc.net/media_landscapes/the-netherlands#link_154

²¹ http://ejc.net/media_landscapes/the-netherlands#link_152

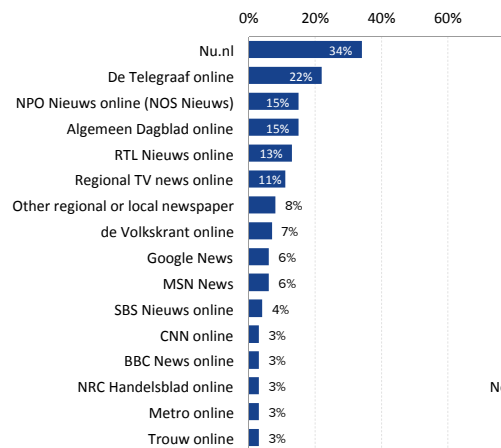
²² <http://www.mediamonitor.nl/mediamarken/dagbladen/dagbladen-in-2014>

TOP BRANDS

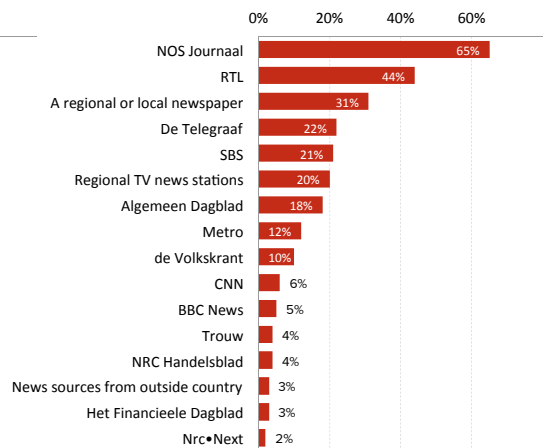
% WEEKLY USAGE



ONLINE



TRADITIONAL (TV, RADIO AND PRINT)



TRADITIONAL (OFFLINE) REACH

Newspapers: 64%
Broadcasters: 81%

DIGITAL REACH

Newspapers: 44%
Broadcasters: 34%
Digital-born: 43%

CROSS-PLATFORM REACH

Newspapers: 73%
Broadcasters: 84%

RECENT INDUSTRY DEVELOPMENTS

Dutch newspapers are struggling with declining circulations and advertising revenues. This is the main driver of continued market consolidation.²³ De Persgroep recently bought the regional newspaper chain Wegener while another Belgian company, Mediahuis, purchased NRC Media.²⁴ The latter recently pledged to refocus NRC•Next – founded in 2006 and aimed at a younger audience – to align more closely with its quality paper *NRC Handelsblad*. In 2007, the Netherlands still had four free daily newspapers; only *Metro* has survived amidst declining advertising revenues.

Public broadcasters face major budget cuts. Enforced by the government, public service broadcasters have merged into larger news brands (AVRO/TROS, KRO/NCRV, BNN/VARA). The umbrella organisation of Dutch public service broadcasters NPO is increasingly organising scheduling centrally.²⁵

Compared to neighbouring countries, news coverage has always been very internationally focused. The Netherlands has a history as one of the world's leading trading nations, which perhaps explains a relatively high interest in international developments. BBC News, CNN International, and the German and Flemish broadcasters have been available for households with cable TV since the 1990s. The Dutch education system also teaches the population to speak at least two foreign languages, enabling them to make use of these sources.

RECENT DEVELOPMENTS IN DIGITAL NEWS

The Netherlands has one of the highest internet penetration rates in the world and a high adoption of mobile devices. Starting in 1999, long before their print and broadcast competitors, digital-born Nu.nl is the most popular Dutch news website. The popular newspaper website Telegraaf.nl, De Persgroep's AD.nl, and public broadcaster website NOS.nl complete the list of the four most popular news websites. Legacy media brands, such as NOS, NRC Handelsblad, and Het Financieel Dagblad, are moving towards digital-first policies as a response to increasing online competition. De Persgroep in particular invests heavily in innovation. Paywalls have been erected by many newspaper websites, although only a few websites have a 'solid' wall.

The Netherlands has a range of well-visited news blogs, such as GeenStijl.nl – known for its provocative style of reporting – and opinion blog The Post Online. Dutch start-ups Blendle²⁶ and eLinea are reshaping the distribution of news by unbundling newspapers and magazines and offering their content as decontextualised pay-per-click articles. Innovation can also be seen in the field of investigative journalism, led by start-ups Follow The Money and De Correspondent. The latter raised over €1 million in eight days in 2013 to start a long-form journalism platform.²⁷ However, overall, with only 10% of respondents indicating that they paid for online news in the past year, paying for online news is still rare.

²³ H. van Kranenburg, 'Market Structure and Innovation Policies in the Netherlands', in H. van Kranenburg (ed.), *A European Comparison of Innovation Policies to Trigger Innovation in Journalism in News Media* (Nijmegen: Radboud University Nijmegen, 2015).

²⁴ <http://www.persgroep.nl/news/de-persgroep-en-wegener-maken-%C3%A9%C3%A9n-bedrijf>; <https://www.nrcmedia.nl/blogs/nrc-media-overgenomen-door-mediahuis>

²⁵ <http://www.a516digital.com/2014/08/netherlands-public-service-channels.html>

²⁶ <https://medium.com/on-blendle/one-website-all-newspapers-and-magazines-3a5f6c8360d9>

²⁷ <http://www.niemanlab.org/2013/04/a-dutch-crowdfunded-news-site-has-raised-1-3-million-and-hopes-for-a-digital-native-journalism>

TOP SOCIAL NETWORKS*

1. FACEBOOK	38%
2. GOOGLE+	13%
3. WHATSAPP	12%
4. YOUTUBE	11%
5. TWITTER	10%

*Used in the last week for news



DIGITAL PARTICIPATION

21% shared a news story via email or social media.



27%

say the smartphone is the main way of accessing online news

16%

say the tablet is the main way of accessing online news



10%

paid for online news in the last year



SOCIAL MEDIA AND PARTICIPATION

Due to the high internet penetration rate and widespread adoption of mobile devices, the Netherlands is the European Union leader in terms of proportion of social media users.²⁸ With the demise of domestic social network Hyves in 2013,²⁹ Facebook has become the most popular social network in the country.

However, although social media are increasingly used to access news on computers, tablets, and smartphones, the percentage of users sharing news through social media in the Netherlands is still relatively low (21%) compared to other European countries.

Joëlle Swart and Marcel Broersma (University of Groningen)

²⁸ <http://www.cbs.nl/NR/rdonlyres/06A12225-495E-4620-80F6-F2A53E819957/0/20131001b15art.pdf>

²⁹ <http://www.telecompaper.com/news/tmg-confirms-shutdown-of-hyves-social-network-976833>

POLAND

STATISTICS

Population:	38.5m
Internet:	67%
Interest in news:	60%
Trust in news:	56%

Unlike many other countries in Central Europe, Poland has produced strong national media companies. Cyfrowy Polsat (the conglomerate that owns the largest satellite platform, national commercial TV, and mobile network operator), Agora (the publisher of *Gazeta Wyborcza*), and ITI (until recently the owner of TVN) were, at one time, all expected to expand internationally. However, for various reasons – including debts, huge internal competition, and structural market crisis – with the exception of ITI they remain large domestic companies.

With a large share of the total advertising revenue, and viewing hours broadly unchanged over the years, TV remains the most important medium in Poland.³⁰ As a news source, however, it has transformed significantly in the last decade. The largest broadcasters (Polsat, TVN) and the public broadcaster (TVP) have delegated almost all news output to their digital news channels (TVP Info, TVN24, Polsat News). Terrestrial networks focus instead on entertainment, with only evening newscasts and a small number of other news programmes remaining.

Research suggests that print readership in Poland is going down.³¹ The lack of a reading habit has impacted upon newspaper sales, with dailies' paid circulation shrinking by 3-5% annually, and weekly magazine circulation stagnating.

The Polish press and the country's growing local radio sector have a more prominent local footprint than their TV counterparts. Newspapers are considered a key source of democratic free

³⁰ <http://msp.gov.pl/en/polish-economy/economic-news/5487,Polish-ad-market-in-2014-internet-segment-to-grow-press-to-shrink.html>

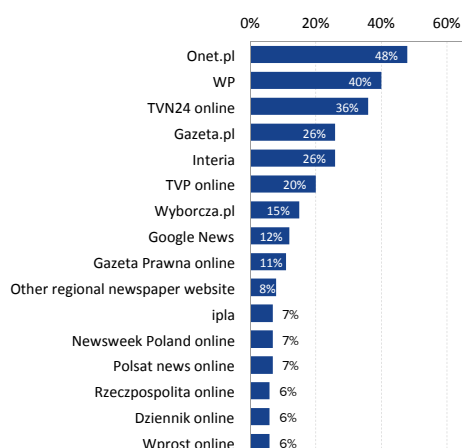
³¹ http://wyborcza.pl/1,75517,17297141,Badanie_czytelnictwa__6_milionow_Polakow_poza_kultura.html

TOP BRANDS

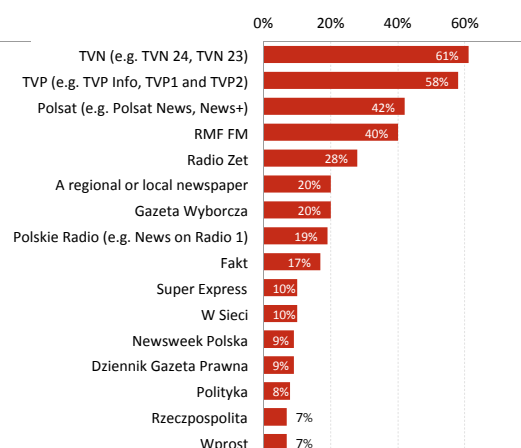
% WEEKLY USAGE



ONLINE



TRADITIONAL (TV, RADIO AND PRINT)



TRADITIONAL (OFFLINE) REACH

Newspapers: 63%
Broadcasters: 91%

DIGITAL REACH

Newspapers: 53%
Broadcasters: 50%
Digital-born: 75%

CROSS-PLATFORM REACH

Newspapers: 74%
Broadcasters: 93%

speech, and following their emergence in post-communist society, have never been tightly regulated. There are still about 2,000 local titles in operation, while on a regional level the Polish affiliate of Verlagsgruppe Passau publishes 19 dailies.

Major media outlets have historically provided free online content to their audiences over the past two decades. Price-sensitive Polish audiences have embraced new digital media – mostly large web portals such as Onet, WP, and Interia – as reliable news sources, even though they often serve soft news which is liable to sensation and oversimplification.

RECENT INDUSTRY DEVELOPMENTS

It remains to be seen how the acquisition of TVN by Scripps Network Interactive from the US in July 2015 will impact the Polish news landscape.³² TVN is the owner of TVN24, the first and the most successful TV news channel in Poland and Central Europe.

So far, television consumption is relatively stable as the three big players – TVP, Polsat, and TVN – enjoy a major share of TV viewership. These channels, and their digital offshoots, remain the primary TV news sources for Poles. However, due to the expansion of digital cable and satellite channels, this share is slowly eroding.

The public broadcaster (TVP) remains challenged by inefficiencies in licence fee collection, which constitutes about one-third of its revenue. The rest of TVP's income comes

from commercial sources, making it vulnerable to fluctuations in the advertising market and the sales tactics of its purely commercial rivals. TVP has lost almost a half of its audience and advertising revenue in the last five years, which has led to the outsourcing of many personnel.

Gazeta Wyborcza remains the largest quality newspaper in Poland. Its competitors are *Rzeczpospolita* and *Dziennik Gazeta Prawna* as well as tabloids *Fakt* and *Super Express*. *Polityka* maintains its lead in weekly magazines followed by *Newsweek Poland*.

RECENT DEVELOPMENTS IN DIGITAL NEWS

The most important market development was the move by Agora (*Gazeta Wyborcza*) to use the Piano subscription system to launch its own 'Wyborcza only' digital subscription packages. As a leader of quality national dailies in Poland, it had joined the Piano Media system with six other major publishers in 2012,³³ but later decided to implement a tailored paywall to have more freedom in creating new digital products and offers, as well as to control its reader base.³⁴ The move was a landmark event for digital news in Poland, since at the time of launching independent packages Agora had less than 10,000 digital subscribers, but by December 2014 their subscriber base had grown to 55,000.³⁵ Other publishers followed. As of summer 2015, Polska Press Grupa (Verlagsgruppe Passau's affiliate) is in process of launching two titles with Polska Press-only content, in addition to

³² <http://www.marketwatch.com/story/scripps-networks-interactive-completes-acquisition-of-polish-media-company-tvn-2015-07-02>

³³ <http://www.eastist.com/2012/07/polish-media-team-up-to-create-a-piano-media-paywall>

³⁴ <http://www.wan-iffra.org/articles/2014/02/04/agora-sa-launches-new-metered-paywall-to-offer-wider-variety-of-digital-packages>

³⁵ http://m.wyborcza.biz/biznes/1,106501,17458999,Wzrost_przychodow_Agory_Prawie_55_tys_osob_placi.html (in Polish)

remaining in the Piano National platform with all 20 titles. In 2014, *Newsweek Polska* launched its own internally developed paywall.

Others have responded by accommodating an audience that seeks quality news online but doesn't want to pay for it. Today, large web portals are not only boosting news consumption but also experimenting with new forms, such as long-read interviews and features, which they hope will attract more upmarket readers and thus create premium advertising opportunities. The recent merger of WP and o2 in 2014 created a new leader in online portals and significantly increased competition in a sector that has been running a race to the bottom in recent years.³⁶

A number of interesting independent projects have emerged in the past few years. One of them is Polityka Insight.³⁷ With its focus on politics, the economy, and European affairs, it is more of an analytical centre (like *The Economist's* 'Intelligence Unit') than a traditional newsgathering organisation. It provides its online briefings to a small group of paying subscribers including business managers, public officials, and law firms. Owned by *Polityka* weekly, its business is almost entirely subscription-based. A lot of digital projects are created out of the conviction that the largest market in Central Europe is deep enough to support them. However, as in many other markets, the vast majority of these projects still have a long way to go to reach profitability.

SOCIAL MEDIA AND PARTICIPATION

Social networks have a comparatively long history in Poland. The creation of Nk.pl in 2006 – the first social network in the country – introduced many to both social media and the internet. Alongside traditional media, audiences often indicate Facebook and YouTube in surveys as important sources of news, and Poles actively share news via social media.

On 8 June 2015 Zbigniew Stonoga, a Polish businessman and former aide to the deputy prime minister, posted documents to Facebook from a probe into a wiretapping scandal that shook the Polish government in 2014. It is the biggest online leak Poland has seen, and arguably the biggest news story to have been broken in the country by social media.³⁸

Vadim Makarenko

(*Gazeta Wyborcza* and former Journalist Fellow)

TOP SOCIAL NETWORKS*

1. FACEBOOK	56%
2. YOUTUBE	35%
3. GOOGLE+	22%
4. TWITTER	9%
5. LINKEDIN	3%

*Used in the last week for news



DIGITAL PARTICIPATION

37% shared a news story via email or social media.



14%

say the smartphone is the main way of accessing online news

3%

say the tablet is the main way of accessing online news



17%

paid for online news in the last year



³⁶ <http://www.innovacap.com/news/319/16/1>

³⁷ <http://www.politykainsight.pl>

³⁸ <http://www.thenews.pl/1/9/Artykul/209593,Documents-from-tape-affair-probe-biggest-leak-in-Polish-history>; <http://www.bloomberg.com/news/articles/2015-06-09/poland-probes-internet-leak-of-files-from-2014-taping-scandal>

PORTUGAL

STATISTICS

Population:	11m
Internet:	65%
Interest in news:	70%
Trust in news:	66%

The Portuguese media market is dominated by the top brands in each sector. But if one looks at the media sector in general, it is clear that the Portuguese media landscape is dominated by a small number of companies that invest in different sub-sectors. Companies like Impresa (SIC), Cofina (*Correio da Manhã*), Media Capital (TVI), and RTP Group (the Portuguese public broadcaster) all have well defined verticals across all media forms.³⁹

The 25 April 1974 Revolution helped determine the structure of today's media market; including the birth of contemporary journalistic values based on press freedom and ideological exemption.⁴⁰ Although Portugal is a rather small country geographically, it is surprisingly diverse, and this is reflected in the popularity of local newspapers and radio stations. Newspapers like *Jornal do Fundão* and *Açoriano Oriental* are good examples of this phenomenon; they cover geographically small areas but their print circulation is both large and steady.⁴¹

Digital trends reflect that this is a market led by traditional brands adapting their content for digital audiences and outlets. SAPO and Notícias ao Minuto are the most popular digital-born brands; however, they focus more on sports and entertainment news, and often repackage news from other sources. A recent exception to this model is *Observador*, a digital-only newspaper that produces its own content, and has been increasing its online reach since it launched in 2014.⁴²

³⁹ http://ejc.net/media_landscapes/portugal

⁴⁰ <http://www.cmdconf.net/2013/makale/PDF/29.pdf>

⁴¹ http://www.apct.pt/Analise_simples.php

⁴² <http://www.publico.pt/politica/noticia/novo-jornal-digital-o-observador-lancado-dia-19-1635262>

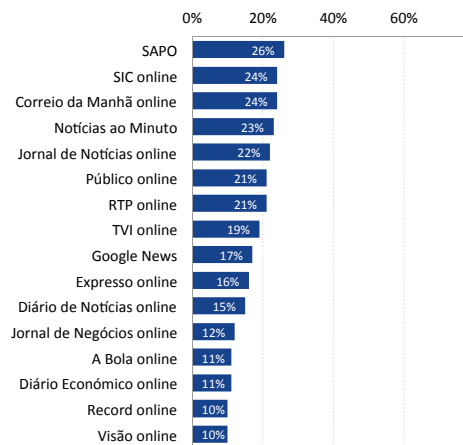


TOP BRANDS

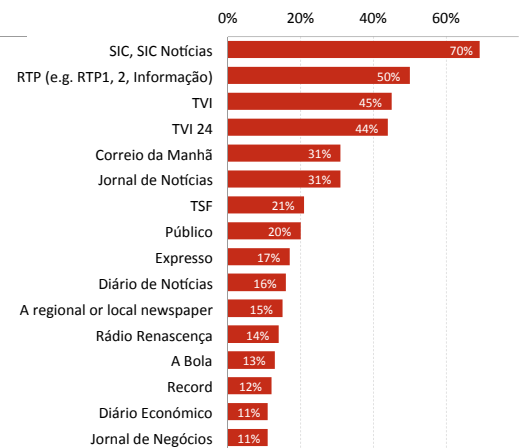
% WEEKLY USAGE



ONLINE



TRADITIONAL (TV, RADIO AND PRINT)



TRADITIONAL (OFFLINE) REACH

Newspapers: 75%
Broadcasters: 92%

DIGITAL REACH

Newspapers: 66%
Broadcasters: 51%
Digital-born: 62%

CROSS-PLATFORM REACH

Newspapers: 84%
Broadcasters: 94%

RECENT INDUSTRY DEVELOPMENTS

The penetration rate of television remains above 99% and most households have more than one television set. This makes TV the most successful sector in the Portuguese media industry,⁴³ with major investment from companies like TVI, SIC, and RTP. TV fiction such as soap operas is among the most viewed genres, and research has consistently shown that users look for specific brands when it comes to finding news and entertainment.⁴⁴

The most important newspapers in Portugal are associated with the leading media groups. Daily tabloid-like brands such as *Correio da Manhã* and *Jornal de Notícias* appear to be the most successful in terms of sales. In contrast, brands such as *Público* and *Diário de Notícias* are less sensationalist and have considerably lower sales figures. They focus more on political, economic, and cultural content.

Weekly newspapers and magazines retain considerable relevance in the Portuguese media landscape. Examples include *Jornal Expresso* and *Revista Visão*; both retained by the Impresa Group. Alongside this, the importance of the sports press cannot be ignored, with titles such as *A Bola* and *Record* being very popular among male readers.

Recently, traditional press brands like *Correio da Manhã*, *A Bola*, and the economic newspaper *Diário Económico* have been investing in news channels on paid TV in an effort to optimise their reach in a multimedia environment. These efforts reinforce the importance of the television sector for major media brands within the Portugal's media landscape.

RECENT DEVELOPMENTS IN DIGITAL NEWS

The challenge of successfully transitioning from traditional to digital is ongoing. However, there haven't been significant changes in the way brands produce and sell news. Most brands continue to produce news suitable for both print and online platforms.

Nonetheless, the major concern for most newspaper brands is the reluctance of Portuguese readers to pay for digital news; only 7% paid for news in the last year. In response to this, the daily newspaper *Público* has explored a soft paywall; giving readers access to 15 free articles per month, with a paid subscription required after that. In contrast, *Observador* is focused on the primacy of advertising as their main revenue source.

Monetising digital is also challenged by the relatively low numbers of people reading news on tablets and smartphones. The reasons for this include relatively low levels of digital literacy and data caps from most telecoms operators (such as MEO, Vodafone, and NOS) which are low compared to some other markets; thereby affecting how much content can people access without paying additional charges.

⁴³ http://ejc.net/media_landscapes/portugal#link_95

⁴⁴ <http://www.slideshare.net/live4digital/youtglobaluserportugalreport15nov201311>

SOCIAL MEDIA AND PARTICIPATION

Portuguese media brands are turning their attention to the possibilities offered by social media; not least because the Portuguese are active social media users – although there are differences in usage levels across different demographics. Media brands seldom produce content specifically for social media platforms, instead currently using social to promote and attract audiences to their more traditional digital channels.

Facebook is the leading social network in the country; 67% of Portuguese social media users claim they used Facebook in the last week for interaction with news content. Many recent events, which have enjoyed considerable media coverage, have had a high profile on social networks. Audiences are using social media to define what is newsworthy – particularly

with events related to social and political mobilisation, like the country-wide demonstrations against austerity on 15 September 2012.⁴⁵

The Portuguese, although quite traditional in many of their other forms of media consumption, can become active at sharing news via social channels. On social networks like Facebook, people are not just interacting with their friends; they are making ‘the news’ a frequent topic of interaction and debate.

*Ana Pinto Martinho and Gustavo Cardoso
(ISCTE-University Institute of Lisbon)*

Miguel Paisana and Tiago Lima (Obercom)

TOP SOCIAL NETWORKS*

- | | |
|-------------|-----|
| 1. FACEBOOK | 67% |
| 2. YOUTUBE | 26% |
| 3. GOOGLE+ | 18% |
| 4. TWITTER | 7% |
| 5. LINKEDIN | 6% |

**Used in the last week for news*



DIGITAL PARTICIPATION

57% shared a news story via email or social media.



13%

say the smartphone is the main way of accessing online news

9%

say the tablet is the main way of accessing online news



7%

paid for online news in the last year



⁴⁵ <http://www.bbc.co.uk/news/world-europe-19611375>; <http://globalvoicesonline.org/2012/09/15/portugal-protest-15spt-preview>; <http://globalvoicesonline.org/2012/09/17/portugal-15spt-troika-austerity-queselixaetroika>

TURKEY

STATISTICS

Population:	81.5m
Internet:	57%
Interest in news:	76%
Trust in news:	34%

To outsiders, Turkey can give the impression of a country with a lively media landscape, with numerous newspapers and magazines, all competing with one another with their colourful front pages and bold headlines. There is obviously some truth to this. There are over 40 national newspapers, with a total circulation of around 5 million. In addition to the state broadcaster TRT, more than 20 national and 200 regional privately owned TV stations compete on the airwaves. Furthermore, the Turkish press demonstrates a more vigorous character than many other countries in close proximity to the Middle East, with a variety of voices from Turkey's fractured political spectrum often finding room for expression.

Yet, upon closer examination, a more complex – and potentially less vibrant – picture emerges.⁴⁶ As in many other countries, media ownership is concentrated within a small cohort of major media companies.⁴⁷ Newspaper groups have openly disputed the circulation figures of their rivals,⁴⁸ and a downward circulation trend can be seen across most publications in line with many other markets.⁴⁹

The country has come under criticism from some quarters for lack of journalistic freedom,⁵⁰ the distribution of funds for public

⁴⁶ http://ejc.net/media_landscapes/turkey

⁴⁷ <http://turkishpressguide.blogspot.co.uk>

⁴⁸ http://www.todayszaman.com/national_newspapers-call-for-impartial-auditing-to-end-controversy-over-circulation_316863.html

⁴⁹ <http://is.jrc.ec.europa.eu/pages/ISG/MCI/documents/BayrakdarDeniz.pdf>
http://www.ansamed.info/ansamed/en/news/sections/generalnews/2014/09/09/media-turkeys-newspapers-face-the-threat-of-disappearance_db5672c2-0985-49ed-ae19-5e78522af492.html

⁵⁰ <http://en.rsf.org/turkey.html>

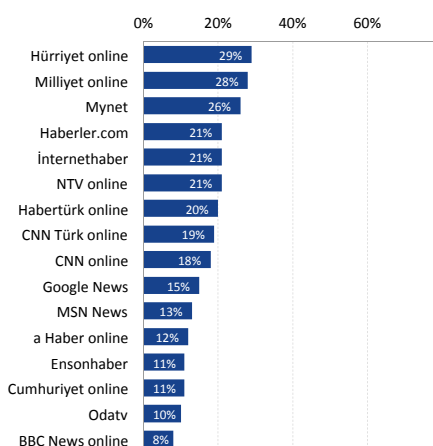


TOP BRANDS

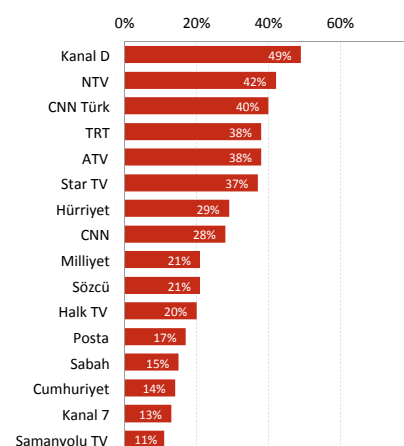
% WEEKLY USAGE



ONLINE



TRADITIONAL (TV, RADIO AND PRINT)



TRADITIONAL (OFFLINE) REACH

Newspapers: 64%
Broadcasters: 92%

DIGITAL REACH

Newspapers: 67%
Broadcasters: 40%
Digital-born: 67%

CROSS-PLATFORM REACH

Newspapers: 82%
Broadcasters: 93%

advertising,⁵¹ and political interference.⁵² It is common for radio and TV stations to have their broadcasts suspended for airing sensitive material, and the US-based Committee to Protect Journalists reported in 2012 that Turkey has more journalists in prison than any other country.⁵³ Turkey dropped from 99th place in the World Press Freedom Index in 2002⁵⁴ to 149th out of 180 countries by 2015.⁵⁵

Private broadcasters are heavily dominated by big media groups, usually part of larger business conglomerates whose core activities can include anything from construction to banking. These groups often combine ownership of a newspaper with that of television channels, radio stations, and online portals. The largest is the Doğan media group, bringing together television broadcasting (including Kanal D and CNNTürk), popular radio stations, and national newspapers, with *Hürriyet* at the forefront. The parent company is also actively involved in the energy sector, commerce, insurance, and tourism. Other prominent media groups have a similar structure, leading to concerns that their media activities serve as a tool to further wider business interests.

This dynamic, coupled with evolving political alliances which can alter the editorial stance of newspapers and broadcasters, no doubt influenced the views and opinions of news media amongst some of our survey respondents.

RECENT INDUSTRY DEVELOPMENTS

From its foundation in 1968 to the early 1990s, state-owned TRT held the monopoly in broadcasting, with funding coming

mainly from a tax levied on electricity bills. Since then, private broadcasters have entered the media market, creating a fierce ratings war, with soap operas and talent shows dominating TV screens. Television is the main source of information for the Turkish public at large. Most television stations belong to a media group that also owns a newspaper, with writers and commentators from the paper regularly appearing in TV studios.

Newspapers are feeling the pressure of digital competition. They have often responded by laying off personnel, and in the case of the national daily *Radikal*, ceasing print editions to keep only an online presence.

Over the past few years, an increasing number of journalists in mainstream media have found themselves sacked or demoted – usually in the wake of an article or an interview critical of the ruling party. Many believe pressure from the government to be behind these dismissals, causing mainstream media to become increasingly timid. Fear of receiving a sudden, heavy, tax bill is also a concern, as manifest in recent tax evasion proceedings being instigated against the Doğan group.⁵⁶

News coverage is typically populated with domestic stories, leaving limited space for world events. Educated, English-speaking audiences in urban conurbations can redress this by watching international broadcasters like CNN on cable.

RECENT DEVELOPMENTS IN DIGITAL NEWS

Turkey has a large and growing youth population, almost half

⁵¹ http://www.todayszaman.com/anasayfa_pro-govt-papers-received-tl-132-mln-from-public-ads_349953.html

⁵² <http://www.rethinkinstitute.org/wp-content/uploads/2014/11/Diminishing-Press-Freedom-in-Turkey-Turkey-Task-Force.pdf>

⁵³ <http://www.bbc.co.uk/news/world-europe-17992011>

⁵⁴ http://en.rsrf.org/spip.php?page=classement&id_rubrique=297

⁵⁵ <https://index.rsrf.org>

⁵⁶ <http://en.rsrf.org/turkey-government-leaned-on-judicial-06-03-2014,45958.html>

of the country is under 30 years of age. This, coupled with wider economic growth, offers a real digital opportunity.⁵⁷

Hurriyet.com – the website for one of Turkey's most established newspapers – is the leader in online news traffic. Another daily, *Milliyet*, which was part of the Doğan group until its recent sale, is also a strong performer online. Both have amongst the highest figures for monthly online unique users in Europe.

Taraf and *Cumhuriyet* are two dailies that have tried paywalls, but both have subsequently abandoned them. Political commentators with daily columns are widely read and are crucial to newspaper sales. However, many websites republish their articles for free by sidestepping copyright restrictions, contributing to the failure of paywall approaches.

Newspapers subsequently started offering subscription packages, with added content for their electronic editions geared towards the tablet market, whilst continuing to offer free access to most of their online content. Dailies face stiff competition from digital-born players; with Mynet, Internethaber, and Haberler examples of three popular online news sources.

SOCIAL MEDIA AND PARTICIPATION

Social media play an integral role in the distribution of information. Turkey has one of the world's highest Twitter penetration rates,⁵⁸ is one of the top countries in terms of Facebook popularity,⁵⁹ whilst also being one of Facebook's fastest growing markets.⁶⁰

The growing influence of social media has provoked unease amongst the Turkish authorities. Since 2007 there have been eight different blocks⁶¹ on social networks, with four in the past two years, including prominent temporary bans on Twitter and YouTube in both 2014 and 2015.⁶² But censorship efforts, which have been effective for decades with traditional media, are broadly ineffective online. Blocking access to websites has had little effect on internet users in Turkey, with many bypassing restrictions via VPN or proxy servers.⁶³

The anti-government Gezi Park protests in 2013 were seen to define the emergence of the 'social media generation'.⁶⁴ In contrast, mainstream broadcasters largely chose not to report on these events. The 24-hour news channel CNNTürk opted to broadcast a documentary on penguins; a decision which subsequently has been seen as a symbol of media submission to the governing party.⁶⁵

Despite President Erdoğan previously calling Twitter 'a menace' to Turkish society,⁶⁶ social media continue to play a crucial role in online news consumption. Twitter, Facebook, and videos uploaded to YouTube have helped fill gaps in mainstream media provision and become key sources of information for many people in Turkey.

Emre Azizlerli (BBC and former Journalist Fellow)

TOP SOCIAL NETWORKS*

1. FACEBOOK	69%
2. TWITTER	33%
3. YOUTUBE	33%
4. WHATSAPP	17%
5. GOOGLE+	14%

*Used in the last week for news



DIGITAL PARTICIPATION

52% shared a news story via email or social media.



28%

say the smartphone is the main way of accessing online news

6%

say the tablet is the main way of accessing online news



26%

paid for online news in the last year



⁵⁷ <http://www.economistgroup.com/leanback/the-next-big-thing/with-a-large-population-of-digital-natives-turkey-is-on-the-verge-of-a-media-revolution>

⁵⁸ <http://www.businessinsider.com/the-top-twitter-markets-in-the-world-2013-11?IR=T>

⁵⁹ <http://www.countryranker.com/top-10-countries-with-most-facebook-users-in-the-world>

⁶⁰ <http://www.socialbakers.com/blog/38-top-10-countries-on-facebook-in-the-last-six-months>

⁶¹ <http://www.hurriyet.com.tr/ekonomi/28665837.asp>

⁶² <http://www.wsj.com/articles/turkish-court-bans-access-to-internet-sites-over-hostage-crisis-content-1428325451>; <http://www.bbc.co.uk/news/technology-27691892>; <http://www.telegraph.co.uk/news/worldnews/europe/turkey/11518004/Turkey-blocks-access-to-Facebook-Twitter-and-YouTube.html>

⁶³ <http://motherboard.vice.com/read/turkeys-most-downloaded-app-beats-its-twitter-ban>

⁶⁴ <http://www.bbc.co.uk/news/world-europe-22772352>

⁶⁵ <http://www.theguardian.com/commentisfree/2013/jun/09/turkey-mainstream-media-penguins-protests> <http://ireport.cnn.com/docs/DOC-981558>

⁶⁶ http://www.theregister.co.uk/2013/06/03/turkey_erdogan_calls_twitter_menace_to_society

1.7 COMPARATIVE BRAND ANALYSIS

In this section our principal aim is to chart the development of digital-born brands, and to see how the traditional print and broadcast brands are coping with the online transition.

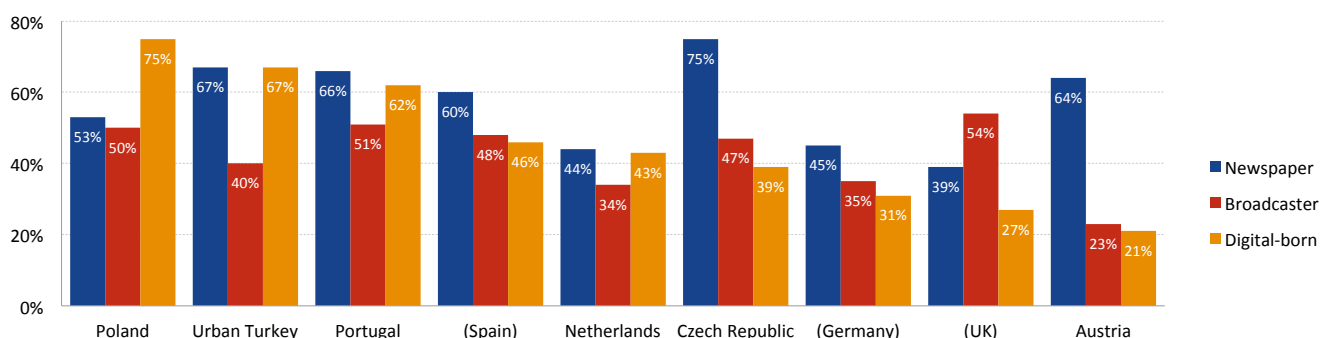
TYOLOGY OF ONLINE BRANDS

We use a three-way typology to classify different types of online news provider. The typology is determined by the provider's origins. First, we have traditional newspaper brands such as *Der Standard* in Austria and *Hürriyet* in Turkey; who started off producing physical print newspapers but now also make much of their content available online. Secondly, we have traditional broadcasters such as RTP in Portugal and Česká televize in the Czech Republic. Again, these brands

started off as TV or radio broadcasters, but have moved part of their operation online in recent years. Finally, we have digital-born brands such as Yahoo, Huffington Post, BuzzFeed, and Google News; who emerged during the internet age without a print or broadcast legacy. Many of the larger digital-born brands are now aiming for an international audience, but as we will see some, such as Onet in Poland and Nu.nl in the Netherlands, maintain a national focus.

When we look at the online reach for each of these three types, the picture varies nationally. In most of the countries examined here, high overall levels of online news consumption mean that at least one brand type enjoys a large combined online reach. Most striking is the large reach of digital-born

ONLINE REACH OF EACH BRAND TYPE BY COUNTRY (ORDERED BY DIGITAL-BORN)



Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample in each country.

ALSO FROM 2015

NEWSPAPER ONLINE

HIGHEST

FINLAND: 79%

LOWEST

JAPAN: 32%

18 COUNTRY AVERAGE

52%

DIGITAL-BORN

HIGHEST

POLAND: 75%

LOWEST

AUSTRIA: 21%

18 COUNTRY AVERAGE

47%

BROADCASTER ONLINE

HIGHEST

URBAN BRAZIL: 72%

LOWEST

AUSTRIA: 23%

18 COUNTRY AVERAGE

44%

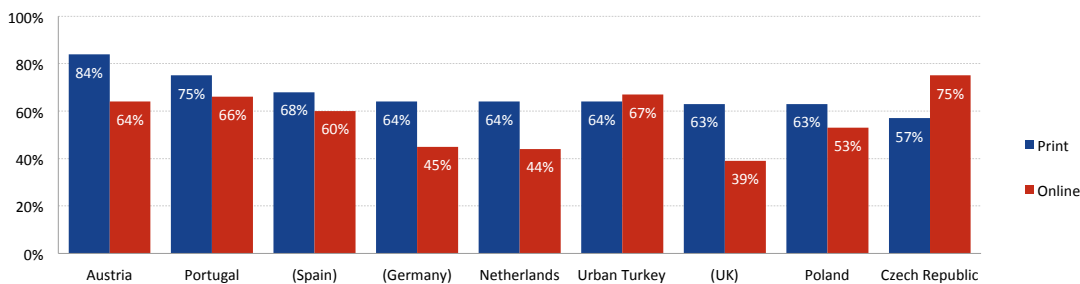
brands in Poland (75%), and of newspaper brands in Austria (64%) and the Czech Republic (75%) compared to broadcasters and digital-born sources.

PRINT BRANDS ENJOY LARGER ONLINE REACH THAN BROADCAST BRANDS

Print brands have been more successful than broadcasters in reaching online news consumers. But for both, with combined offline reach also high – particularly in the case of broadcasters – consumers appear to be supplementing their offline use with online use.

The combined reach of printed newspaper brands remains slightly ahead of the combined reach of their online equivalents in most countries. However, our data come from an online sample, so print is likely to be further ahead amongst the entire population. In the Czech Republic, the very high figures for online newspaper reach can be largely attributed to the success of two brands: *Mladá fronta DNES* (iDNES.cz) and *Právo* (Novinky), each used by just under half of our entire Czech sample. The reach of print remains large in Austria, with the strength of the most popular newspapers – including *Kronen Zeitung* and *Der Standard* – underpinned by subscription and home delivery models.

PRINT AND ONLINE REACH OF NEWSPAPER BRANDS BY COUNTRY (ORDERED BY PRINT)



Q5A. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via TV, radio or print only (Traditional platforms)

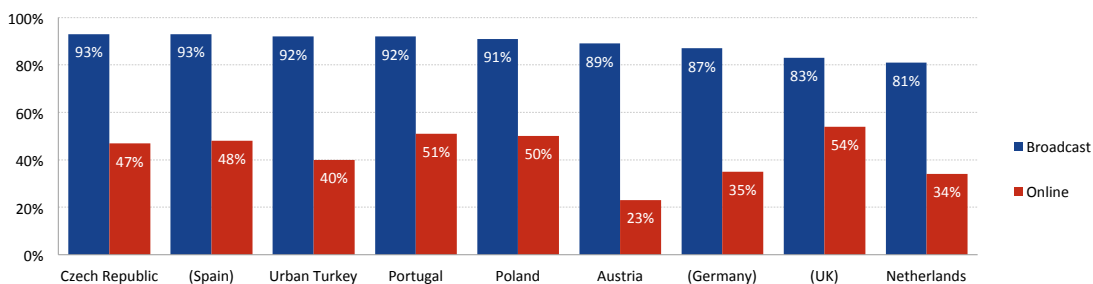
Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample in each country.

In all countries, the offline reach of broadcaster brands is considerably larger than online. Most people still see TV as their main source of news. This, together with technological barriers (such as bandwidth limitations), has until fairly recently discouraged many of them from placing their news content online. In Portugal, the three main Portuguese broadcasters, RTP (21%), SIC (24%), and TVI (19%), contribute towards a

comparatively large online reach of 51%. In Poland, the online broadcaster reach is similar (50%), with the public broadcaster TVP (20%) and the commercial 24-hour news channel TVN24 (36%) the two main players. In Austria, broadcasters have been less successful, with the publicly funded ORF network (19%) accounting for almost all of the online broadcaster reach.

BROADCAST AND ONLINE REACH OF BROADCASTER BRANDS BY COUNTRY (ORDERED BY BROADCAST)



Q5A. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via TV, radio or print only (Traditional platforms)

Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

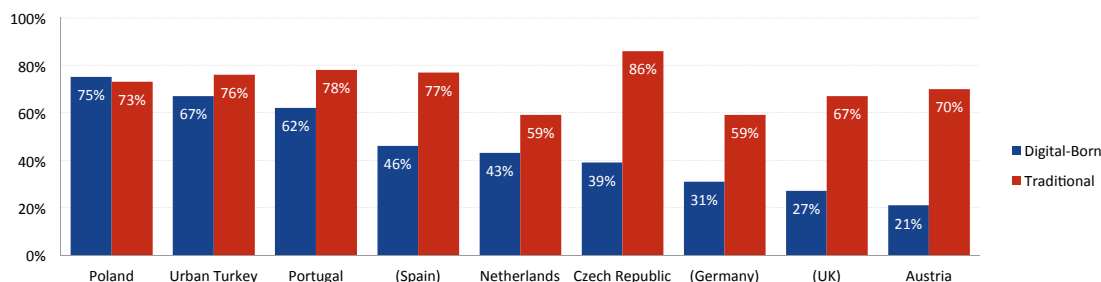
Base: Total sample in each country.

TRADITIONAL BRANDS WITH STRONG ONLINE PRESENCE

Everywhere except Poland the combined online reach of traditional broadcaster and print brands is larger than that of digital-born brands. The preference for traditional brands was particularly evident in the Czech Republic and Austria, where the majority of traditional brands offer their online content for free.

Digital-born brands in Portugal (62%), urban Turkey (67%), and Poland (75%) enjoy a comparatively large combined reach. In Poland we see the largest combined reach of any country surveyed in 2015. In the Netherlands and the Czech Republic, the reach of digital-born brands is smaller, but nonetheless slightly larger than in Germany and the UK. In Austria, digital-born brands reach just one in five.

COMBINED ONLINE REACH OF DIGITAL-BORN AND TRADITIONAL BRANDS BY COUNTRY (ORDERED BY DIGITAL-BORN)



Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample in each country.

DOMESTIC DIGITAL-BORN BRANDS POPULAR










The digital-born news sector includes a diverse range of brands that handle news in quite different ways. As a result, they are becoming increasingly difficult to categorise. Our *Digital News Report* made a distinction between brands that primarily aggregate news from multiple sources – such as Yahoo, MSN, and Google News – and those that also produce and repackage content – such as the Huffington Post and BuzzFeed. We identified that, in many cases, we are seeing the slow decline of the former, and the rise of the latter; particularly among younger respondents.

This distinction is less helpful here, because when we look at our list of the top digital-born brands in each country,

what is most striking is that the reach of international digital-born brands is dwarfed by that of a diverse range of well-established domestic brands that maintain a national focus through language and content. Most of these brands – including Onet, Mynet, and SAPO – can be thought of as first-wave web portals. Like Yahoo and MSN, they were typically founded in the mid-1990s to provide basic web services, but have since expanded into news and publishing. However, some – such as Nu.nl in the Netherlands and Aktuálně in the Czech Republic – are dedicated news websites that have focused on news provision from their outset.

In Poland, the three largest web portals – Onet (48%), WP (40%), and Interia (26%) – provide news in addition to a range of internet services, and are the main contributors to the large combined digital-born reach. Given that some popular Polish

MOST POPULAR DIGITAL-BORN NEWS BRANDS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
First	48% Onet	31% Aktuálně	12% Google News	34% Nu.nl	26% Mynet	26% SAPO	12% Huffington Post	13% T-Online	15% Google News
Second	40% WP	12% Super	5% Yahoo News	6% Google News	21% Haberler	23% Notícias ao Minuto	8% Yahoo News	11% Google News	10% El Confidencial
Third	26% Interia	6% Google News	4% MSN News	6% MSN News	21% Internethaber	17% Google News	6% Google News	6% Huffington Post	9% MSN News

Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample in each country.

Note: Domestic digital-born brands are marked in red.

news sources have introduced paywalls, the popularity of web portals may have received a boost in recent years as price-sensitive consumers turn to them for free news. In Portugal, the most popular digital-born providers are the dedicated news website Notícias ao Minuto (23%) and SAPO (26%); a Portuguese ISP and web portal founded in 1995. In the Netherlands, the dedicated news website Nu.nl is the single most popular source of online news. The web portal Mynet (26%) and the dedicated news site Haberler (21%) make digital-born providers a popular source of news in urban Turkey.

In addition to the presence of the dedicated digital-born news website Aktuálně, the Czech case is particularly interesting because of the role of Seznam. Seznam is a Czech web portal and search engine that until recently was as popular as Google search inside the Czech Republic. Seznam has a news section, but this consists of links to a series of websites – including Novinky.cz, Super.cz, and Sport.cz – the content of which is provided solely by left-wing Czech newspaper *Právo*. As such, Seznam was neither included as a separate news source nor considered a news aggregator in our survey. However, it is undoubtedly central to driving the popularity of these news websites, and may be included as a news source in future studies.



DOMESTIC DIGITAL-BORN BIOGRAPHIES

Most of the brands featured in the table on p. 40 exclusively publish news in the language of their origin country. This means that they have limited international appeal, and as brands are largely unfamiliar to those from abroad. As such, it is useful to sketch out some brief biographical details of the most popular in each country.



Onet was founded in 1996 by the Polish computer firm Optimus and is now one of the most

popular web portals in Poland. It began by providing email hosting and directory services, before first publishing news

content in March 1999. Since 2004, Onet has focused on media and communications output, including entertainment and video on-demand, and operates a number of spin-off websites. Onet signed a deal allowing them to publish repackaged news from CNN and the *Financial Times* in 2007. Onet also manages the websites of several Polish magazines, including *Tygodnik Powszechny* and *Newsweek Poland*. The German Axel Springer group purchased a 75% share in 2012.⁶⁷



Wirtualna Polska (trans. Virtual Poland), or WP, was founded in 1995, and prides itself on being the oldest surviving Polish

web portal. Like Onet, WP began by providing a range of basic internet services such as email hosting, but later moved towards publishing news and entertainment content. In 2007 WP launched their first internet TV channel, and have since expanded into online video news. In 2013, WP was purchased by private equity fund Innova Capital and rival web portal o2.⁶⁸



Interia completes the list of the big three Polish web portals to have survived the bursting of the dotcom bubble at the turn of

the century. It was founded in 1999 through a collaboration between IT firm Comarch and Polish radio station RMF FM. As with Onet and WP, it began by providing free email services, but since 2000 has also developed a focus on news and publishing. In 2007 it launched Interia360; a platform that allows citizen/amateur journalists to submit a piece (including photojournalism) for inclusion on their main homepage.⁶⁹ Like the other Polish web portals, Interia operates a number of subsidiary websites in a wide range of fields. It is now almost entirely owned by the German Bauer Media Group.⁷⁰



Aktuálně (trans. Currently) is a dedicated Czech news website that was established in 2005. It claims to be the first online Czech news source that does not have a print or broadcasting legacy. Though it has its own homepage, it also provides news for the Centrum web portal; both owned

by the Economia group. The Aktuálně website is structured in the same way as that of a newspaper (as evidenced by their inclusion of a masthead),⁷¹ and produces its news content in a similar style. It can be distinguished from the web portals because the focus is on producing original content rather than repackaging news from elsewhere.

Super.cz is an online Czech magazine that exclusively publishes tabloid-style entertainment and celebrity news. It was created jointly by Seznam and Borgias Publishing (*Právo*) to provide news content for the former (in the same fashion

⁶⁷ <http://ofirmie.onet.pl/historia>

⁶⁸ <http://onas.wp.pl/historia.html>

⁶⁹ <http://interia360.pl/o-nas>

⁷⁰ <http://firma.interia.pl/o-nas/historia>

⁷¹ <http://www.aktualne.cz/autori>



as Novinky.cz), whilst also having its own quite limited website. Much of its popularity stems from this affiliation, with nearly 85% of users visiting the Seznam website immediately before Super according to data from Alexa.⁷²



Nu.nl (trans. Now) was founded in 1999.⁷³ It is the most popular Dutch news website, more popular even than websites of newspapers and broadcasters. Nu.nl is a dedicated news website rather than a web portal. Like Aktuálně, Nu.nl is structured in a way that is similar to the website of a

newspaper, and can be distinguished from the web portals in this list because of its focus on producing original news content. It is owned by the Finnish Sanoma Media group. A German counterpart was launched in 2009, but was shut down in 2011 due to low visitor numbers.



Mynet is a Turkish company that was founded in 1999 by US-educated entrepreneur Emre Kurttepe to offer free email access to the Turkish public.⁷⁴

Today it is the most popular Turkish web portal, offering a range of services, including news, games, entertainment, and social media. Due to Turkey's large population, its domestic popularity makes it one of the most visited websites in Europe, as well as a popular source of news within Turkey.



SAPO (trans. Toad), or Servidor de Apontadores Portugueses, is a Portuguese web

portal. It started life in 1995 as a search engine developed by the Computer Science Centre at the University of Aveiro.⁷⁵ Since then it has expanded its web services to email and web hosting, and following an acquisition by Portugal Telecom in 1999, has also become an ISP. In addition to publishing its own news content (mainly entertainment and sport), SAPO has partnerships with other media organisations allowing them to repackage their news and host their websites (with .sapo as part of the URL and a SAPO 'bar' at the top of the page). SAPO has also created separate news sites for other Portuguese-speaking nations, such as Angola and Cape Verde.

INTERNATIONAL DIGITAL-BORN BRANDS YET TO BREAK THROUGH

In most cases we see that international digital-born brands are not as commonly used for news as in the UK, the US, and some other European countries (see table on p. 43). This is particularly true of those that produce original content, such as the Huffington Post, Vice, and BuzzFeed. However, with the exception of Google News, aggregators such as Yahoo, MSN, are only slightly more popular.

The comparatively low figures for brands such as the Huffington Post and BuzzFeed are in part due to the fact that they have not specifically targeted these markets. The countries examined here typically have small populations, speak a local/regional dialect, or have small news markets; all of which means that they are seen as unlikely to be able to generate sufficient revenue to be considered viable. This has to a certain extent insulated domestic brands from competition, and allowed them the space to grow.

Having said this, if we look at data for 18–24 year olds, we see that international brands – particularly the Huffington Post and BuzzFeed – are starting to make small inroads. The impact this might have on the current dominance of domestic digital-born brands can be monitored in future studies.

SOME TRADITIONAL BRANDS BUILDING INTERNATIONAL READERSHIP ONLINE

The internet has broken down the traditional borders previously encountered by broadcasters and publishers. As a result, online content produced in one country can often be consumed simultaneously anywhere in the world.

Our data show that some traditional brands, like the BBC and CNN, are making some headway internationally, but digital readership is nonetheless small. CNN online has proven particularly popular in urban Turkey (18%), in line with the popularity of the parent TV channel among the educated, English-speaking classes. Turkey also has a CNN-branded Turkish-language channel (CNN Türk), with the associated website used by 19% of our urban sample. However, the editorial content provided by CNN and CNN Türk has little in common – though there may nonetheless have been some conflation from our respondents.










⁷² <http://www.alexa.com/siteinfo/super.cz>

⁷³ <https://www.linkedin.com/company/697052>










⁷⁴ <http://www.mynet.com/kurumsal/hakkimizda.php>

⁷⁵ <http://sobre.sapo.pt/en/about-sapo/about-us>

PROPORTION THAT USE SELECTED INTERNATIONAL DIGITAL-BORN BRANDS FOR NEWS BY COUNTRY ALL AGES

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Huffington Post	1%	0%	2%	1%	2%	2%	12%	6%	8%
BuzzFeed	1%	0%	1%	1%	2%	1%	5%	1%	1%
Vice	-	0%	1%	1%	2%	1%	1%	1%	1%
Yahoo News	3%	0%	5%	1%	5%	2%	8%	5%	8%
MSN News	-	0%	4%	6%	13%	9%	5%	4%	9%
Google News	12%	6%	12%	6%	15%	17%	6%	11%	15%

18–24s

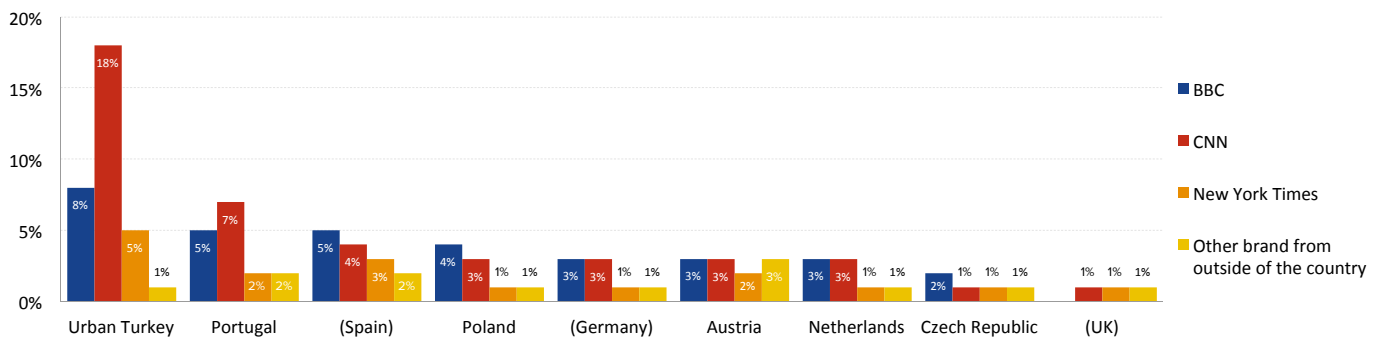
	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Huffington Post	2%	2%	7%	2%	2%	4%	17%	5%	7%
BuzzFeed	4%	3%	6%	5%	5%	7%	23%	1%	3%
Vice	-	0%	4%	1%	2%	1%	3%	2%	3%
Yahoo News	4%	0%	6%	1%	4%	1%	5%	3%	6%
MSN News	-	0%	6%	3%	9%	8%	5%	4%	8%
Google News	10%	8%	16%	7%	12%	15%	10%	10%	19%

Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample/18–24s Poland = 2015/249, Czech Republic = 1023/107, Austria = 1009/109, Netherlands = 2044/222, Urban Turkey = 1041/203, Portugal = 1049/108, UK = 2149/228, Germany = 1969/170, Spain = 2026/186.

Note: We did not ask respondents about Vice or MSN use in Poland.

ONLINE REACH OF SELECTED INTERNATIONAL NEWS BRANDS BY COUNTRY (ORDERED BY BBC)



Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample in each country.

Note: Online reach of the BBC in the UK is not shown as it is a domestic brand in this market.

INTERNATIONAL REACH OF BRANDS FROM DIASPORA COMMUNITIES AND SHARED-LANGUAGE AUDIENCES

Alongside this, we also wanted to begin to explore the impact of digital content originating from our survey nations, but consumed in other markets. For diaspora communities, online news is a boon, enabling audiences to keep in touch with news and developments 'from back home' in real time. For those with linguistic ties to other countries, the internet allows them to sample news from a greater number of sources or from different perspectives. News organisations benefit from

both, with increased traffic and engagement levels helpful in monetising their digital portfolio.

For each country we have explored the top three online news brands (as identified by our survey) and mapped them against open data from Alexa.⁷⁶ Alexa data do not distinguish between news use and overall use, but nonetheless allow us to partially grasp the varying sizes of different types of international audience.

In doing this we see that news brands from Poland, which has a prominent diaspora community, typically have a 15%

⁷⁶ Alexa's traffic ratings are based on information captured by users in Alexa's global data panel. The rolling nature of this programme means that Alexa traffic ranks are updated daily, using a combination of unique visitors and pageviews to determine a site's ranking. Alexa is owned by Amazon.

audience share from abroad. Similarly, news brands from Austria and Portugal, which have strong linguistic ties with other populations (as well as diaspora communities), receive as much as 27% of their traffic from abroad; thus highlighting the important role that language plays in the success of online news sources.

For the top Polish news brands, around 15% of traffic comes from abroad. Polish news brands are more popular in the

UK than elsewhere, accounting for around 5% of total traffic. Alexa ranks Onet sixth in a list of the most popular websites in Poland. Outside of its country of origin, the site is the 161st most popular website in the UK; and it is the 58th most visited website in Ireland. WP and TVN24 have a similar audience profile, with the UK and Germany also its most popular overseas markets.

INTERNATIONAL AUDIENCES FOR ONLINE NEWS BRANDS POLAND

	Domestic reach (news content)	Alexa ranking (all content)	Domestic / international audience share	Prominent international markets (% of total traffic)
Onet	48%	Poland: 6 th Global: 204 th	85% / 15%	UK: 4% Germany: 2%
WP	40%	Poland: 7 th Global: 297 th	85% / 15%	UK: 5% Germany: 2%
TVN24 online	36%	Poland: 16 th Global: 1,415 th	84% / 16%	UK: 5% Germany: 3%



Q5b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample Poland = 2015.

Source: www.alexa.com (Correct as of 07/07/2015)

The share of international traffic for Portuguese news brands is considerably higher. Perhaps not surprisingly the second largest audience for the Portuguese website SAPO – top of our list of online news sources – can be found in Brazil. After this the two largest markets can be found in the UK

and Angola. Audiences in these countries will include both diaspora audiences and those with a shared language. The site is the 23rd most popular site in Angola, but 2,072nd in the UK. Meanwhile, Correio da Manhã finds that its second largest international market is in France.

INTERNATIONAL AUDIENCES FOR ONLINE NEWS BRANDS PORTUGAL

	Domestic reach (news content)	Alexa ranking (all content)	Domestic / international audience share	Prominent international markets (% of total traffic)
SAPO	26%	Portugal: 5 th Global: 860 th	73% / 27%	Brazil: 14% UK & Angola: 2%
Correio da Manhã	24%	Portugal: 8 th Global: 2,627 th	76% / 24%	Brazil: 4% France: 3%
Notícias ao Minuto	23%	Portugal: 42 nd Global: 11,467 th	74% / 26%	Brazil: 15% Macao: 2%



Q5b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample Portugal = 1049.

Source: www.alexa.com (Correct as of 07/07/2015)

Austria has strong linguistic and cultural ties with Germany, with the result that there is some cross-border interplay in news consumption. This relationship is two-way; German brands such as *Der Spiegel* are popular in Austria (a country which accounts for 4% of *Der Spiegel*'s global online audience and where the site is the 33rd most-visited), just as a number

of Austrian-born online brands also enjoy sizeable audiences in Germany. Austria's leading news website in our survey, *krone.at*, finds that just over 20% of its traffic comes from abroad, with Germany-based news consumers accounting for 12% of their audience.

INTERNATIONAL AUDIENCES FOR ONLINE NEWS BRANDS AUSTRIA



	Domestic reach (news content)	Alexa ranking (all content)	Domestic / international audience share	Prominent international markets (% of total traffic)
Krone	25%	Austria: 20 th Global: 5,226 th	80% / 20%	Germany: 12% Switzerland: 2%
ORF	19%	Austria: 6 th Global: 1,458 th	85% / 15%	Germany: 7% Switzerland & Italy: 1%
Der Standard	14%	Austria: 9 th Global: 3,037 th	78% / 22%	Germany: 13% Switzerland: 2%

Q5b. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: Total sample Austria = 1009.

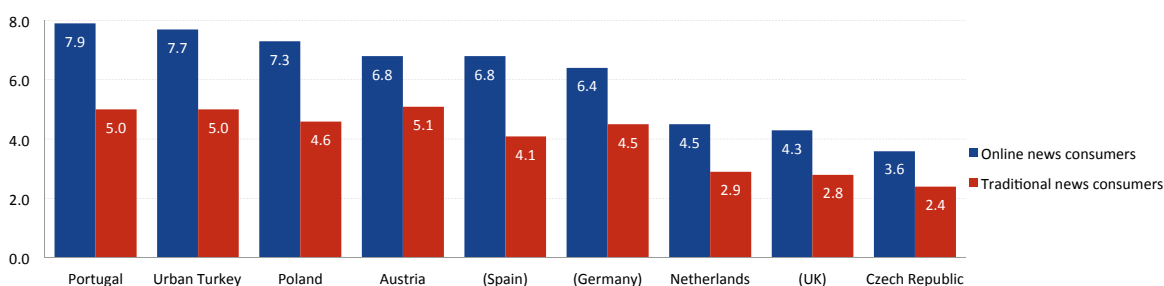
Source: www.alexacom (Correct as of 07/07/2015)

ONLINE NEWS USERS ACCESSING MORE BRANDS

Linked to this, we see that the internet has enabled more people to access more sources of news in every country. If we compare the average (mean) number of news brands used

by online consumers with the average of those within our sample who only consume offline news, we can see that online news consumers use between one and three extra brands depending on the country – even after brands used both online and offline are counted only once.

AVERAGE NUMBER OF NEWS BRANDS USED BY ONLINE AND TRADITIONAL CONSUMERS BY COUNTRY (ORDERED BY ONLINE)



Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.

Q5A. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via TV, radio or print only (Traditional platforms)

Q5B. Which, if any, of the following have you used to access news in the last week? Please select all that apply. Via online platforms (web, mobile, tablet, e-reader)

Base: All who consumed news from an online/traditional only news source in the last week Poland = 1673/316, Czech Republic = 909/88, Austria = 693/290, Netherlands = 1522/458, Urban Turkey = 901/120, Portugal = 885/136, UK = 1544/547, Germany = 1148/741, Spain = 1708/273.

Note: Consumption of the same brand online and offline (e.g. *Guardian* and *Guardian Online*) is counted only once.

2 NEWS ACCESS AND CONSUMPTION

In this section we lay out the overall shape of news consumption across TV, print, radio, and online. We look at levels of interest in the news as well as frequency of access. We also explore the level of trust consumers have in the news they use as well as the news more generally. Finally, we focus on interest in different types of news.

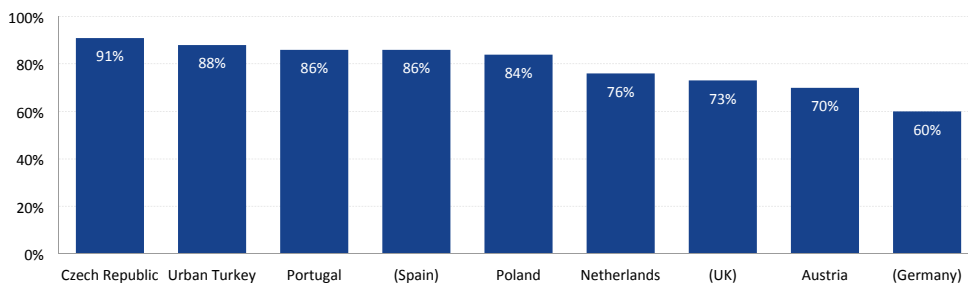
2.1 SOURCES OF NEWS

ONLINE NEWS SOURCES POPULAR

Online news sources are particularly popular in Portugal, Poland, urban Turkey, and the Czech Republic. In the Czech Republic, 9 out of 10 (91%) respondents stated that they had used an online news source during the previous week,

with figures from Poland (84%), urban Turkey (88%), and Portugal (86%) all above our 18 country average of 80%. Even in countries where traditional sources remain popular, such as Austria (70%) and the Netherlands (76%), we still see considerably higher levels of online news access than in Germany (60%).

PROPORTION THAT USE ONLINE NEWS BY COUNTRY



Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.
Base: Total sample in each country.










TRADITIONAL NEWS SOURCES REMAIN IMPORTANT

In every country news consumption is being spread across both traditional and online sources. Though online news sources are popular, TV news is also very widely used, with at least three-quarters of our sample in each country stating that they had used it in the previous week. Newspapers remain remarkably popular in Austria. Here, two-thirds (67%) of our sample read a printed newspaper in the last week; nearly 20 percentage points higher than in any other country

we surveyed in 2015. In contrast, newspapers are much less frequently read in Poland (22%) and the Czech Republic (33%). Radio remains an important source of news, with between a one-third and one-half using it for news depending on the country. Figures for radio news use in Austria (49%) and the Netherlands (48%) are among the highest we have seen this year.

We should, however, view these figures cautiously. Given that these data were collected using an online survey, it is likely that the use of traditional sources has been understated and

PROPORTION THAT USE EACH AS A SOURCE OF NEWS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
TV	81%	85%	78%	80%	75%	85%	75%	82%	82%
Radio	44%	35%	49%	48%	32%	42%	37%	50%	40%
Printed Newspapers	22%	33%	67%	40%	47%	39%	38%	38%	47%
Online (inc. social media)	84%	91%	70%	76%	88%	86%	73%	60%	86%

Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.
Base: Total sample in each country.

ALSO FROM 2015

ONLINE (INC. SOCIAL) TV

HIGHEST

CZECH REPUBLIC & URBAN
BRAZIL: 91%

LOWEST

GERMANY: 60%

18 COUNTRY AVERAGE

80%

HIGHEST

CZECH REPUBLIC &
PORTUGAL: 85%

LOWEST

US: 64%

18 COUNTRY AVERAGE

77%

RADIO

HIGHEST

GERMANY: 50%

LOWEST

JAPAN: 17%

18 COUNTRY AVERAGE

38%

PRINTED NEWSPAPERS

HIGHEST

AUSTRIA: 67%

LOWEST

FRANCE: 19%

18 COUNTRY AVERAGE

37%

that use of online sources has been overstated - particularly in Turkey, where internet penetration is comparatively low and

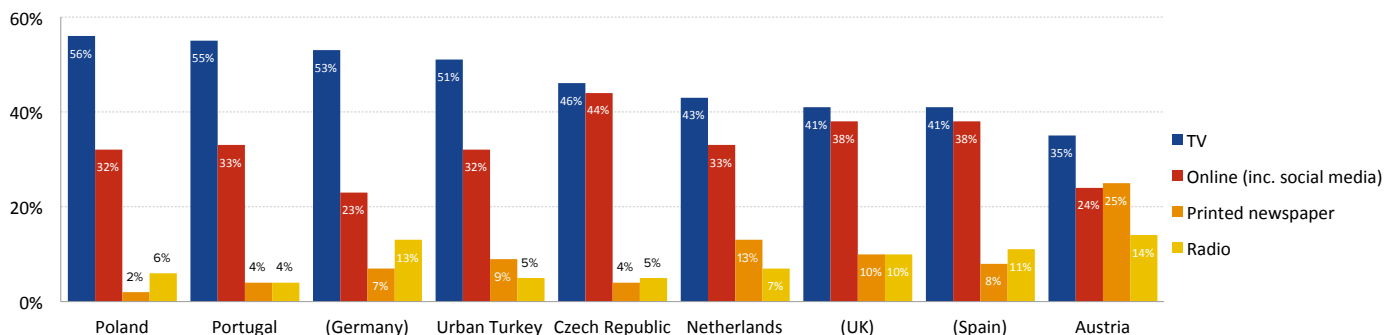
our sample was drawn from the more affluent, better educated, and younger, urban population.

TV STILL SEEN AS THE MAIN SOURCE OF NEWS

We also asked our respondents about what they thought of as their main source of news. TV came out ahead of online in all cases, apart from in the Czech Republic, where the difference is not statistically significant. The gap between TV and online

is large in Poland, Portugal, and urban Turkey, but elsewhere online is close behind. The preference for TV is lowest in Austria (35%), where a quarter (25%) see printed newspapers as their main source, and 14% the radio. Fewer than 1 in 20 in Poland (2%), Portugal (4%), and the Czech Republic (4%) see printed newspapers as their main news source.

PROPORTION THAT SAID EACH SOURCE WAS THEIR MAIN SOURCE OF NEWS BY COUNTRY (ORDERED BY TV)



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?

Base: All who used a source of news in the last week Poland = 1995, Czech Republic = 1017, Austria = 1001, Netherlands = 2017, Urban Turkey = 1034, Portugal = 1041, UK = 2105, Germany = 1943, Spain = 2014.

Note: Data for each country does not add up to 100% because the small proportion who selected another source as their main source of news are not shown.

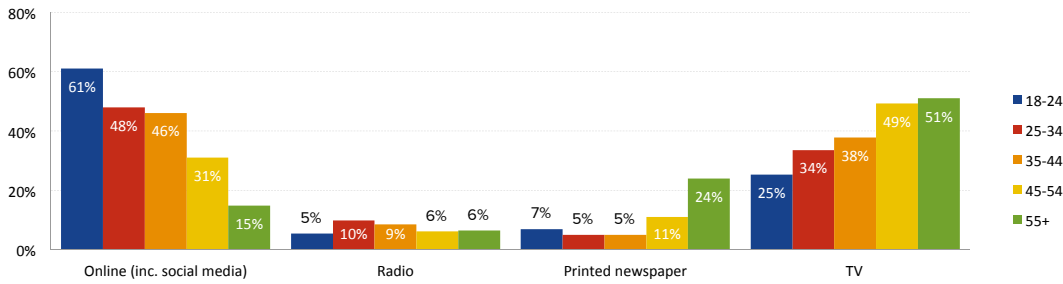
DIFFERENT AGE GROUPS FAVOUR DIFFERENT NEWS SOURCES

As highlighted in the *Digital News Report*, we see clear generational divides when it comes to demographics identifying their main news source. The story is much the same here. If we look at data from the Netherlands, we can see that a higher proportion of younger respondents said that they see

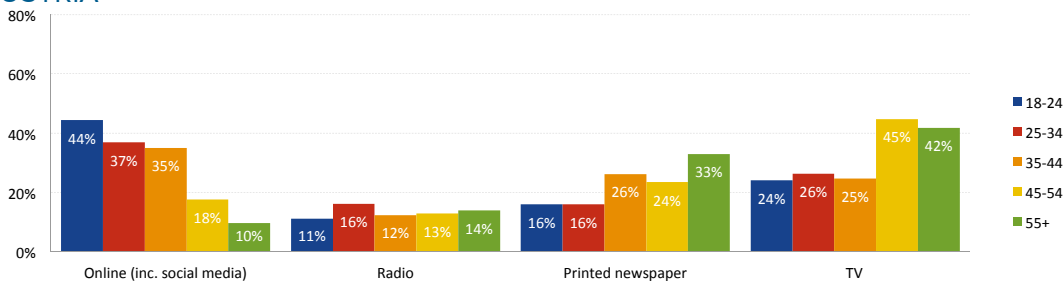
online as their main source of news. Conversely, older users favour TV. The age profiles of those who preferred radio and printed newspapers are much flatter. This general pattern is repeated across all countries. The data from Austria show the greatest deviation, with the age profile for printed newspaper preference broadly similar to TV in that it is skewed towards the older age groups.

PROPORTION WITHIN EACH AGE GROUP THAT SAID EACH SOURCE WAS THEIR MAIN SOURCE OF NEWS

NETHERLANDS



AUSTRIA



Q4. You say you've used these sources of news in the last week, which would you say is your MAIN source of news?

Base: 18–24s/25–34s/35–44s/45–54s/55+ that used a source of news in the last week Netherlands = 221/273/345/386/792, Austria = 109/163/185/195/357.

Note: Data do not add up to 100% because the small proportion who selected another source as their main source of news are not shown.

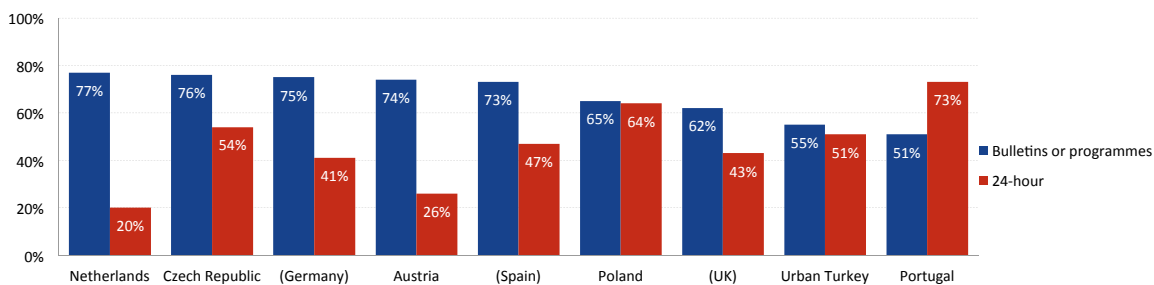
TV NEWS BULLETINS MORE POPULAR THAN 24-HOUR NEWS

If we look in more detail at the types of TV news used, we can see that scheduled news bulletins/programmes are significantly more popular than 24-hour news in the Czech Republic and Austria, where the public broadcaster's (ORF) 24-hour news output is confined to internet radio. The low figure for 24-hour news in the Netherlands is probably caused

by the overlap between the news output of NOS Journaal and its 24-hour equivalent NPO Nieuws, which we did not treat as distinct in our survey.

In Poland and urban Turkey, consumption of bulletins and 24-hour news is roughly even, but in Portugal 24-hour news channels such as RTP Informação (operated by Portugal's public broadcaster), SIC Notícias, and TVI24 are together more popular.

PROPORTION THAT USE EACH TYPE OF TV NEWS BY COUNTRY (ORDERED BY BULLETINS)



Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.

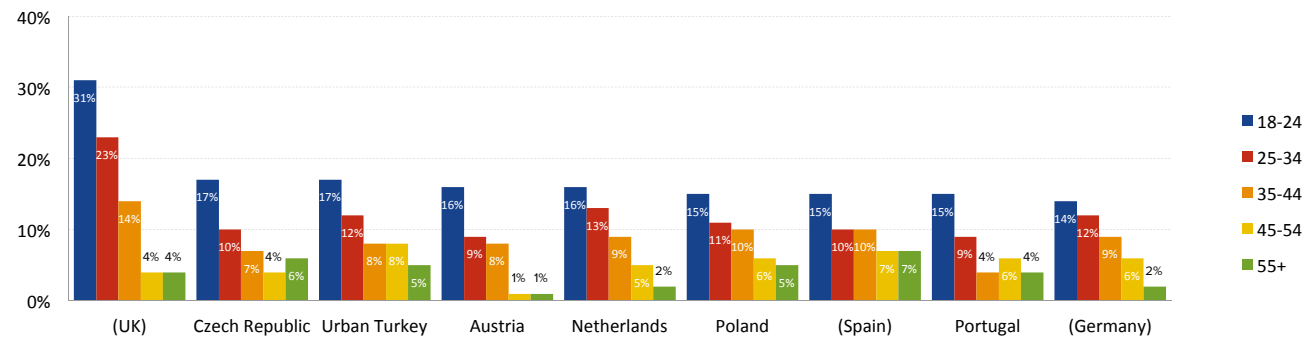
Base: Total sample in each country.

SMALL NUMBER OF YOUNGER CONSUMERS ‘ONLINE-ONLY’

We also know from our *Digital News Report* that many younger users have abandoned scheduled TV news bulletins in recent years. Similarly, we can see a small number of younger users that only use online news sources. In the UK 31% of 18–24










year olds in the UK only use online news, compared to 15–17% elsewhere. This figure falls sharply for the older age groups, dropping as low as 1% of over 45s in Austria, where online sources are also less popular generally. What is perhaps most striking about this is that the vast majority of younger users are spreading their news consumption across both online and traditional news sources.

PROPORTION OF EACH AGE GROUP THAT ONLY USE ONLINE NEWS BY COUNTRY (ORDERED BY 18–24)



Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.
Base: 18–24s/25–34s/35–44s/45–54s/55+ Poland = 249/392/337/350/687, Czech Republic = 107/190/189/165/372, Austria = 109/163/185/195/357, Netherlands = 222/280/352/396/794, Urban Turkey = 203/296/233/134/175, Portugal = 108/200/209/187/345, UK = 228/258/316/442/905, Germany = 170/282/354/392/771, Spain = 186/385/437/371/647.

PROPORTION OF EACH GENDER THAT ONLY USE ONLINE NEWS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Male	9%	10%	5%	6%	10%	6%	11%	6%	9%
Female	8%	6%	5%	8%	9%	6%	13%	7%	7%

Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.
Base: Male/Female Poland = 969/1046, Czech Republic = 497/526, Austria = 494/515, Netherlands = 999/1045, Urban Turkey = 541/500, Portugal = 500/549, UK = 1000/1148, Germany = 972/997, Spain = 1002/1024.

2.2 INTEREST IN THE NEWS AND FREQUENCY OF ACCESS

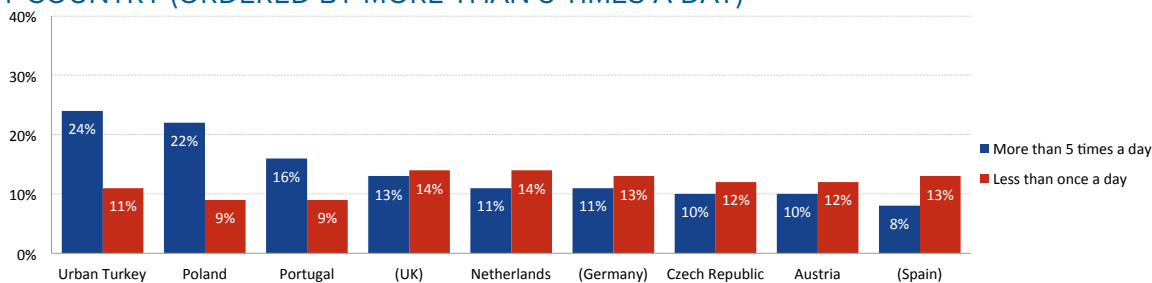
We also asked our respondents about their level of interest in the news, and the frequency with which they access it.

DAILY ACCESS IS THE NORM, BUT NATIONAL VARIATION IN MORE FREQUENT ACCESS

In terms of accessing the news, we can see that – in line with data from our comparator countries – roughly 85-90% of

respondents access the news at least once a day. However, we see more variation in the more frequent access patterns. The proportion who access the news more than five times a day in urban Turkey (24%) and Poland (22%) is approximately double the proportion that did the same in the Czech Republic (10%), Austria (10%), and the Netherlands (11%). It should, however, be stressed that these figures for frequency of access do not include the small proportion that consume news less than once a month.

PROPORTION THAT ACCESSED NEWS MORE THAN 5 TIMES A DAY AND LESS THAN ONCE A DAY BY COUNTRY (ORDERED BY MORE THAN 5 TIMES A DAY)



Q1B. Typically, how often do you access news? By news we mean national, international, regional/local news and other topical events accessed via any platform (radio, TV, newspaper or online).

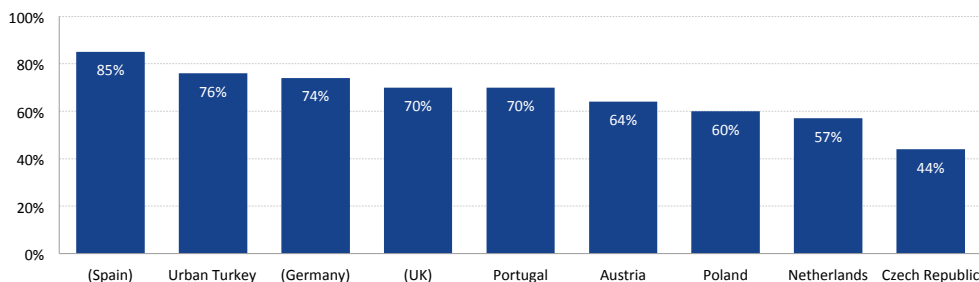
Base: Total sample in each country.

INTEREST IN THE NEWS GENERALLY LOWER THAN ELSEWHERE IN EUROPE

Interest in the news is typically slightly lower than in other European countries. In Poland (60%), the Netherlands (57%), and the Czech Republic (44%), the proportion who declared

that they were either 'extremely' or 'very' interested in the news was lower than the 18 country average of 68%.⁷⁷ However, given that our methodology filtered out non-news users, the figures for all countries are likely to be high compared to the overall population.

PROPORTION THAT ARE EITHER EXTREMELY OR VERY INTERESTED IN THE NEWS BY COUNTRY



Q1C. How interested, if at all, would you say you are in news?

Base: Total sample in each country.

Note: Figures were arrived at by combining the proportion that are either 'extremely' or 'very' interested in the news.

⁷⁷ The low figure of 44% in the Czech Republic may be partly due to the use of 'extrémní zájem' as an option in the translated Czech questionnaire, combined with a desire amongst respondents to avoid extreme stances.

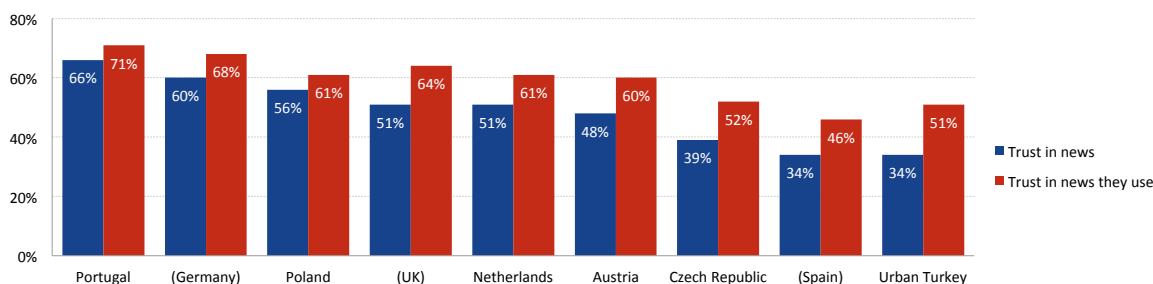
2.3 TRUST IN THE NEWS

TRUST IN NEWS VARIES NATIONALLY

We asked our respondents about whether they feel they can 'trust most of the news most of the time' and whether they can 'trust most of the news they use most of the time'. Though

the level of agreement with both statements varied nationally, in every country we see that respondents place more trust in the sources they chose to use than in all available sources. Furthermore, the gap between the two is typically reduced where the overall level of trust is high.

PROPORTION THAT TRUST THE NEWS AND TRUST THE NEWS THEY USE BY COUNTRY (ORDERED BY TRUST IN NEWS)



Q6A. Thinking about news in general, do you agree or disagree with the following statement? 'I think you can trust most news most of the time'

Q6B. Thinking specifically about news sources that you use, do you agree or disagree with the following statement? 'I think I can trust most of the news that I use most of the time'

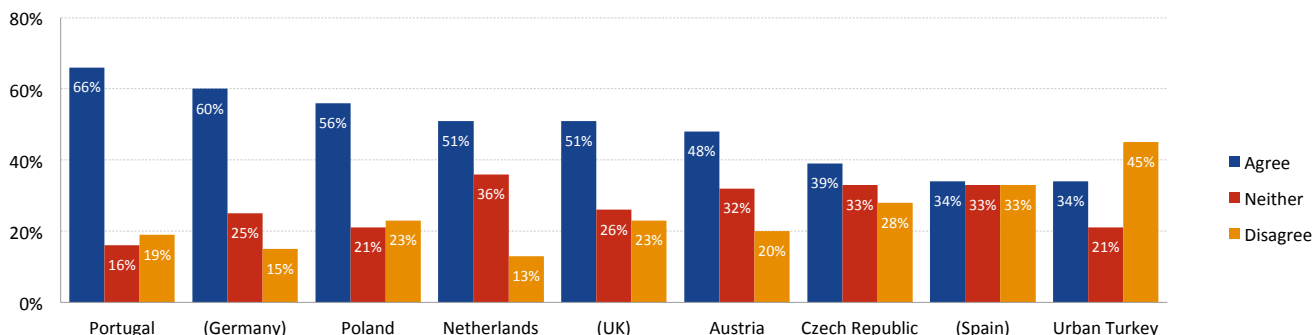
Base: Total sample in each country.

Note: Figures are arrived at by combining the proportion that 'strongly' or 'tend to' agree.

Trust in the news is high in Poland (56%) and the Netherlands (51%), but particularly so in Portugal (66%), where the proportion who agree that they can 'trust most news most of the time' is just 2 percentage points lower than our highest

2015 figure (Finland: 68%). Those who disagree that they 'can trust most news most of the time' are in the minority. This is particularly true in the Netherlands, where only 13% disagree.

PROPORTION THAT AGREE/DISAGREE THAT THEY COULD 'TRUST MOST NEWS MOST OF THE TIME' BY COUNTRY (ORDERED BY AGREE)



Q6A. Thinking about news in general, do you agree or disagree with the following statement? 'I think you can trust most news most of the time'

Base: Total sample in each country.

Note: Figures for agree/disagree were calculated by combining the proportion that selected 'strongly' or 'tend to' agree/disagree.

ALSO FROM 2015

AGREE

HIGHEST

FINLAND: 68%

LOWEST

UNITED STATES: 32%

18 COUNTRY AVERAGE

48%

DISAGREE

HIGHEST

URBAN TURKEY: 45%

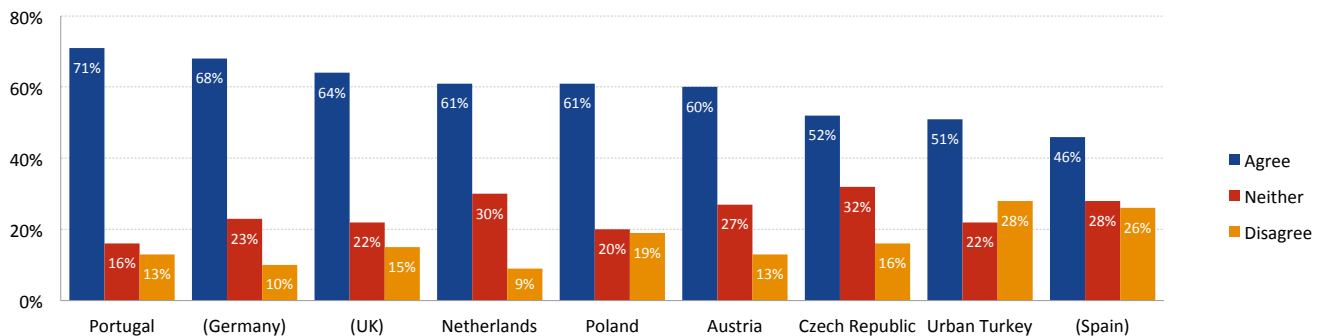
LOWEST

JAPAN: 11%

18 COUNTRY AVERAGE

24%

PROPORTION THAT AGREE/DISAGREE THAT THEY COULD 'TRUST MOST NEWS THAT THEY USE MOST OF THE TIME' BY COUNTRY (ORDERED BY AGREE)



Q6B. Thinking specifically about news sources that you use, do you agree or disagree with the following statement? 'I think I can trust most of the news that I use most of the time'

Base: Total sample in each country.

Note: Figures for agree/disagree were calculated by combining the proportion that selected 'strongly' or 'tend to' agree/disagree.

LOW LEVELS OF TRUST IN URBAN TURKEY EXAMINED

The clear exception is urban Turkey, where the proportion expressing distrust in the news in general is larger than the proportion expressing trust. Furthermore, over a quarter (28%) of our Turkish sample disagree that they trust the news they use.

The high degree of distrust in Turkey is likely to be rooted in a number of factors. First, Turkey as a country is deeply polarised along political lines between adherents of Kamalism and Islamism, with both reflected separately in the ideologies

of traditional news sources.⁷⁸ Secondly, it is clear that the media in Turkey have to deal with pressures that are largely absent in our other countries. Publishers are subject to heavy censorship and government interference, evidenced by Turkey's ranking of 149th (out of 180) in the 2015 Reporters Without Borders Press Freedom Index.⁷⁹ On top of this, trust in the news has also been linked to interpersonal trust.⁸⁰ In the most recent World Values Survey – a prominent global academic public opinion survey that covers most of the world's population – only 12% in Turkey agreed that 'most people can be trusted', compared to 45% in Germany and 66% in the Netherlands.⁸¹

⁷⁸ V. Uce and K. De Swert, 'Introducing Turkey to the Three Media System Models: The Content of TV News in Eleven Countries', in B. Dobek-Ostrowska et al. (eds), *Comparative Media Systems: European and Global Perspectives* (Budapest: CEU, 2010), 67–8.

⁷⁹ <https://index.rsrf.org>

⁸⁰ Y. Tsafati and G. Ariely, 'Individual and Contextual Correlates of Trust in Media across 44 Countries', *Communication Research* 41/6 (2014), 760–82.

⁸¹ World Values Survey Association, *World Values Survey Wave 6* (2010–14). www.worldvaluessurvey.org

2.4 DIFFERENT TYPES OF NEWS










NATIONAL AND INTERNATIONAL NEWS IMPORTANT EVERYWHERE

Our survey asked respondents to indicate up to five types of news that are important to them. National and international news is considered important everywhere, but particularly so in Austria and the Netherlands. Political news is also important in all countries. Though the figures for fun/weird news are comparatively high in the Czech Republic (20%) and the Netherlands (25%), it should be noted that these 'lighter'

forms of news are not generally valued above national and international news, even among younger consumers and casual users.

It is difficult to further identify robust patterns in the data, other than to note that the data from Portugal are similar to those from Spain, with symmetry also evident between Austria and Germany. Respondents in urban Turkey feel that financial, arts, science and technology, health, and education news are comparatively important.

PROPORTION THAT FEEL THAT EACH TYPE OF NEWS IS IMPORTANT TO THEM BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
News about the country	63%	65%	68%	69%	61%	68%	72%	67%	63%
International news	53%	57%	63%	63%	41%	56%	51%	70%	53%
Local news about my town or city	43%	40%	34%	42%	17%	23%	44%	41%	34%
News about my region	40%	50%	52%	50%	26%	26%	37%	54%	41%
Business and financial news	27%	17%	15%	15%	23%	24%	20%	12%	15%
News about the economy	36%	34%	29%	28%	45%	35%	37%	29%	40%
Entertainment and celebrity news	11%	9%	13%	12%	11%	11%	16%	13%	7%
Fun/weird news	13%	20%	12%	25%	12%	16%	14%	12%	16%
Health news	31%	28%	26%	29%	36%	45%	27%	22%	32%
Education news	11%	12%	15%	13%	31%	27%	12%	12%	25%
Arts and culture news	17%	17%	11%	10%	20%	23%	11%	8%	21%
Sports news	35%	30%	28%	29%	28%	33%	30%	28%	30%
News about the country's politics	37%	39%	42%	34%	50%	35%	41%	50%	46%
Science and technology news	29%	26%	26%	22%	36%	36%	24%	25%	31%

Q2. Which of the following types of news is most important to you? Please choose up to five.

Base: Total sample in each country.

3 PAYING FOR NEWS

In this section we focus on paying for news. In particular, we examine newspaper purchasing and paying for online news content.

3.1 NEWSPAPER PURCHASING

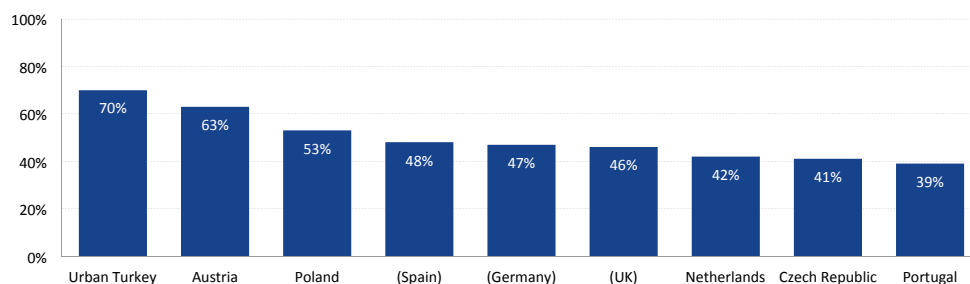
We asked respondents in each country whether they had bought a newspaper in the last week. The question was designed to measure levels of newspaper purchasing rather than levels of newspaper readership, with the broader aim of setting a baseline for tracking changes in purchasing over time.

However, it should be acknowledged that the increasing popularity of free newspapers such as *Heute* in Austria, as well as the successful export of the *Metro* model to many European countries, means that levels of purchasing are no longer as illuminating as they once were. On top of this, it is also likely that paid-for copies of newspapers are typically read by more than one person on average.⁸²

We see varying levels of newspaper purchasing across our countries. Approximately two-thirds paid for a printed newspaper in the last week in both urban Turkey (70%) and Austria (63%). In contrast, only two-fifths reported doing the same in Portugal (39%), the Netherlands (42%), and the Czech Republic (41%).










The top-level figures for newspaper purchasing mask national differences in the way people buy them. Subscription-based home delivery is common in Austria (46%) and the Netherlands (34%), whereas one-off purchasing from a shop or newsstand is more popular in Poland (45%) and urban Turkey (51%).

PROPORTION THAT PURCHASED A PRINTED NEWSPAPER IN THE LAST WEEK BY COUNTRY



Q7. Have you bought (paid for) a printed newspaper in the last week? (This could be an ongoing subscription or one off payment for a physical copy)
Base: Total sample in each country.

PROPORTION THAT MADE EACH TYPE OF NEWSPAPER PURCHASE BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
News stand/shop	45%	25%	14%	5%	51%	30%	36%	14%	39%
Home delivery	4%	13%	46%	34%	14%	7%	7%	30%	5%

Q7. Have you bought (paid for) a printed newspaper in the last week? (This could be an ongoing subscription or one off payment for a physical copy)
Base: Total sample in each country.
Note: Respondents were able to select more than one purchase type.

⁸² For data on readers per copy in the Czech Republic, see: <http://www.newspaperinnovation.com/index.php/2012/06/19/czech-republic-readers-per-copy>

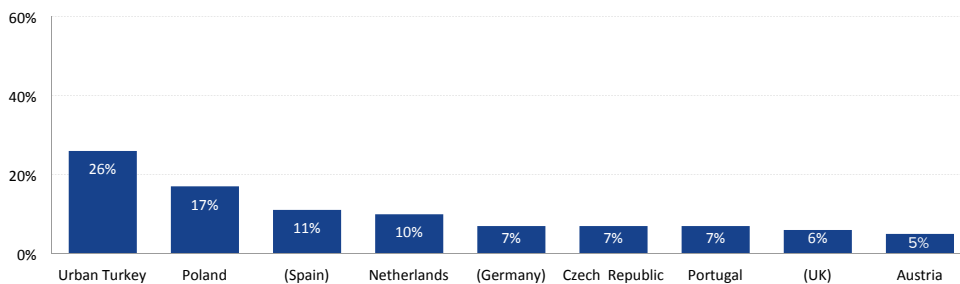
3.2 PAYING FOR ONLINE NEWS

With purchasing in many countries in decline, newspaper publishers are under pressure to fill the hole left by the associated decrease in advertising revenue. For tabloids, this has often resulted in strategies designed to counter the rise of free-sheets. Some broadsheets have responded by erecting paywalls around their digital content, but they continue to experiment with different models.

LOW ONLINE NEWS PAYMENT FIGURES

The proportion of respondents in each country paying for online news content is generally low. In Austria, only one in 20 (5%) paid for online news in the last year; the lowest out of the 18 countries surveyed in 2015. Online payment figures in Portugal (7%) and the Czech Republic (7%) are also low. In these countries, much newspaper content is freely available online, and consumers also have the option of accessing free news from a variety of popular digital-born sources. There is little incentive or precedent for users to pay to access online news, so low figures are to some extent unsurprising.

PROPORTION THAT PAID FOR ONLINE NEWS IN THE LAST YEAR BY COUNTRY



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

ALSO FROM 2015

PAID FOR ONLINE NEWS

HIGHEST

URBAN TURKEY: 26%

LOWEST

AUSTRIA: 5%

18 COUNTRY AVERAGE

11%

SIGNS OF SUCCESS IN POLAND

Publishers appear to have been more successful in urban Turkey (26%) and Poland (17%). In urban Turkey, making a one-off payment for access to an electronic copy of a newspaper has proven popular, with 17% of our urban sample stating they have done so in the last year. However, this figure is unlikely to be representative of Turkey as a whole. Micropayments are also comparatively popular in Poland (9%), but the small amounts involved are unlikely to generate substantial revenue.

Ongoing subscriptions are a different proposition. In Poland, some publishers have seen success with subscription models following the decision by Agora – publisher of the popular Polish broadsheet *Gazeta Wyborcza* – to join the Piano Media system in 2012.⁸³

Piano Media provides a cloud-based digital subscription and analytics platform for publishers. It is now headquartered in New York following their August 2015 merger with Tinypass,⁸⁴

a company that provides pre-launch analytics consulting for publishers.⁸⁵ In addition to *Gazeta Wyborcza*, which reported over 50,000 digital subscribers last year, Polska Press Grupa (*Polska*), Polskie Radio, Forbes.pl, and SMPS Media (*Super Express*), and others, participated in the launch of the Piano National aggregate subscription system in September 2012.

piano

Outside of Poland, other members of the Piano system include Newsweek, the German publisher M. DuMont Schauberg, and the UK based *Aberdeen Press & Journal*, which is owned by the DC Thomson group.⁸⁶

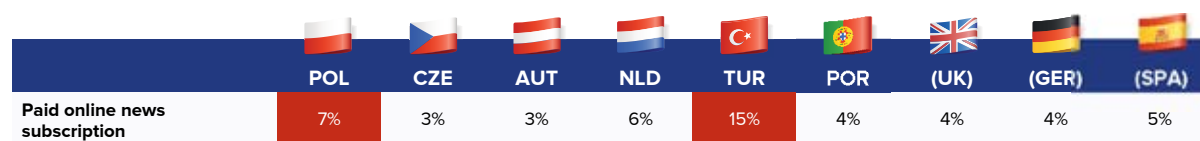
⁸³ <http://www.wan-ifra.org/articles/2015/03/09/piano-media-customer-gazeta-wyborcza-quadruples-digital-subscriptions>

⁸⁴ <http://www.niemanlab.org/2015/08/tinypass-and-piano-media-merge-and-embrace-paywall-as-a-fluid-concept>

⁸⁵ <https://www.linkedin.com/company/piano-media>

⁸⁶ <http://www.theguardian.com/media/greenslade/2014/jun/05/aberdeen-paywalls>

PROPORTION THAT PAID FOR AN ONGOING NEWS SUBSCRIPTION IN THE LAST YEAR BY COUNTRY



Q7ai. You said you have accessed paid for ONLINE news content in the last year... Which, if any, of the following ways have you used to pay for ONLINE news content in the last year? Please select all that apply.

Base: Total sample in each country.

Subscriber numbers are not huge, but the percentage of respondents who report having an ongoing subscription in Poland (7%) is higher than in most of the other European countries we have surveyed. We should also remember that the Polish market is characterised by very popular digital-born brands that allow free access to their content.

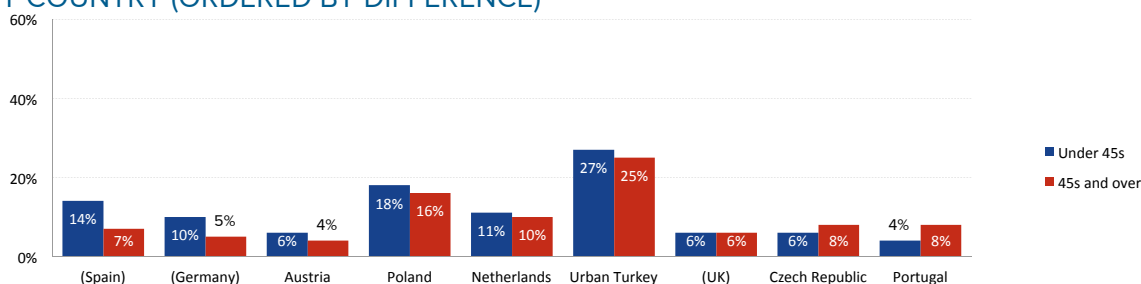
The Turkish figure should be viewed sceptically, as we have seen from the Brazilian case in our *Digital News Report* that urban respondents are much more likely to pay for online news. This is likely to be because they are generally better educated and more affluent, but there could be other factors at work.

DEMOGRAPHICS OF ONLINE NEWS PAYMENT

In terms of online payment demographics, age typically doesn't matter, but gender does. Our data showed no significant differences between over- and under-45s in any

country other than Portugal, where paying for online news is more common amongst older respondents. But in terms of gender, significantly more men paid for online news in all countries apart from urban Turkey and the Czech Republic. In the Netherlands, the proportion (14%) of men paying is twice that of women (7%).

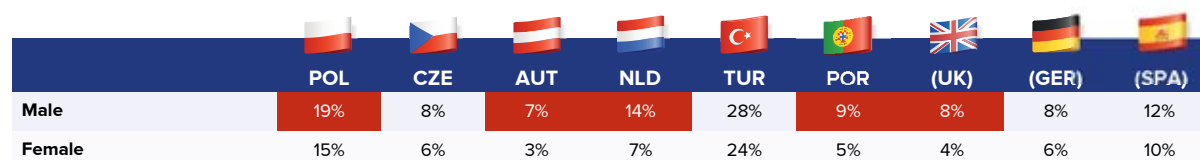
PROPORTION OF UNDER 45s AND 45s AND OVER THAT PAID FOR ONLINE NEWS IN THE LAST YEAR BY COUNTRY (ORDERED BY DIFFERENCE)



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

Base: Under 45s/45s and over Poland = 978/1037, Czech Republic = 486/537, Austria = 457/552, Netherlands = 854/1190, Urban Turkey = 732/309, Portugal = 517/532, UK = 802/1347, Germany = 806/1163, Spain = 1008/1018.

PROPORTION OF EACH GENDER THAT PAID FOR ONLINE NEWS IN THE LAST YEAR BY COUNTRY



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

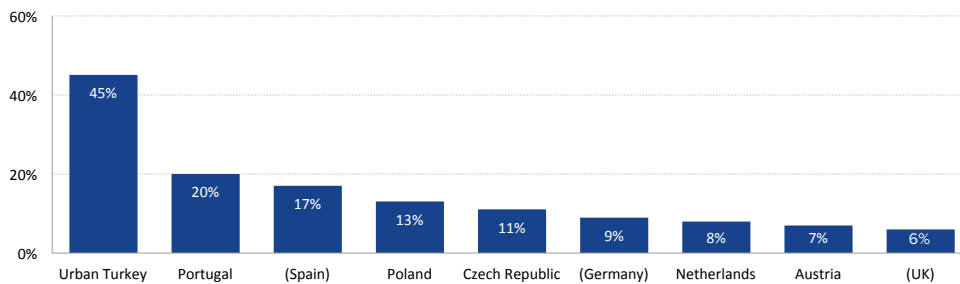
Base: Male/Female Poland = 969/1046, Czech Republic = 497/526, Austria = 494/515, Netherlands = 999/1045, Urban Turkey = 541/500, Portugal = 500/549, UK = 1000/1148, Germany = 972/997, Spain = 1002/1024.

THE FUTURE OF PAID ONLINE NEWS

With so much free news content available in many markets, tempting consumers to pay for news online looks challenging. However, the proportion of people from each country (currently not paying) who said that they are likely to pay for online news in the future looks, on the surface, promising. Figures were particularly high in urban Turkey (45%), Portugal (20%), and Poland (13%).

However, these 'projections' should be viewed very cautiously. Similar levels of online payment likelihood have been observed in our previous *Digital News Reports*, but did not translate into an actual increase in subsequent years. Nonetheless, publishers (even in markets with many free sources of news) may take some small encouragement from the partial success of partnerships such as those between Agora and Piano Media in Poland.

PROPORTION THAT SAID THEY WERE LIKELY TO PAY FOR ONLINE NEWS IN THE FUTURE BY COUNTRY



Q7a.ii. You said you have not paid for online digital content in the last year... How likely or unlikely would you be to pay IN THE FUTURE for online news from particular sources that you like?

Base: All who said they had not paid for online news content in the last year Poland = 1567, Czech Republic = 921, Austria = 937, Netherlands = 1806, Urban Turkey = 701, Portugal = 962, UK = 1992, Germany = 1789, Spain = 1773.

Note: Figures are arrived at by combining the proportion that are 'very' or 'somewhat' likely.

4 ONLINE NEWS IN MORE DETAIL

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










4.1 SMARTPHONES AND TABLETS

MOBILE DEVICE USE VARIES COMPARED TO ELSEWHERE IN EUROPE

We know from the *Digital News Report* that smartphone and tablet news use has been growing in many countries since 2012 – though tablet growth may be levelling off. Use of smartphones for news in Austria (41%) and the Netherlands

(42%) is similar to use in the UK, with use in the Czech Republic (34%) similar to Germany (34%). Smartphone use is high in both urban Turkey (57%) and Poland (52%), but use in Portugal (34%) is significantly lower than in Spain (48%). Tablet use is high in urban Turkey (24%) and the Netherlands (25%), but low in Austria (18%), Poland (18%), and the Czech Republic (16%).

PROPORTION THAT USE EACH DIGITAL DEVICE TO ACCESS NEWS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Laptop/Desktop computer	81%	83%	67%	64%	65%	78%	59%	57%	66%
Smartphone	52%	34%	41%	42%	57%	34%	42%	34%	48%
Tablet	18%	16%	18%	25%	24%	21%	31%	16%	24%

Q8B. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply.

Base: Total sample in each country.

ALSO FROM 2015

COMPUTER FOR NEWS

HIGHEST

CZECH REPUBLIC: 83%

LOWEST

GERMANY: 57%

18 COUNTRY AVERAGE

68%

SMARTPHONE FOR NEWS

HIGHEST

AUSTRALIA: 59%

LOWEST

JAPAN: 33%

18 COUNTRY AVERAGE

45%

TABLET FOR NEWS

HIGHEST

DENMARK: 39%

LOWEST

JAPAN: 13%

18 COUNTRY AVERAGE

23%

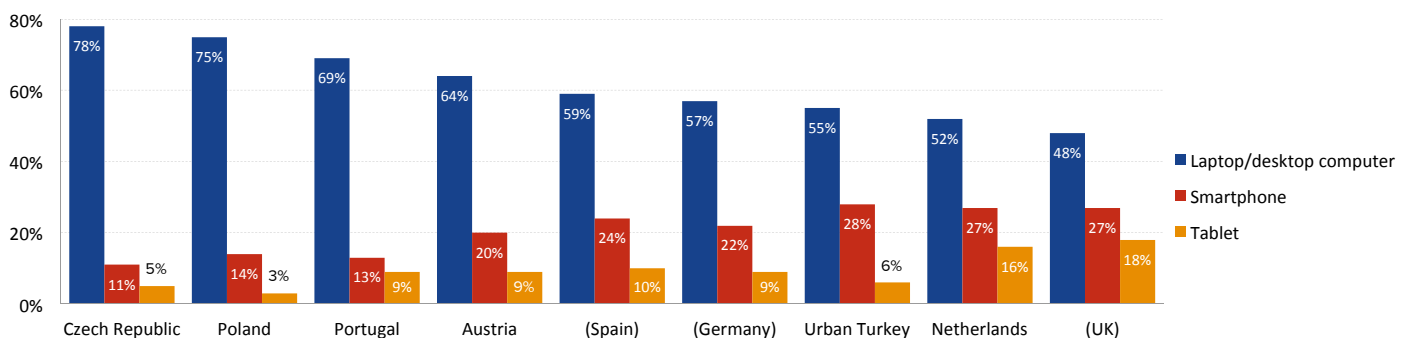
STRONG PREFERENCE FOR COMPUTER NEWS ACCESS OVER MOBILE

We shouldn't lose sight of the fact that laptop/desktop computers remain the most popular device for digital news. Perhaps the most striking feature of our data on digital devices is the popularity of computer news access in Poland (81%), Portugal (78%), and the Czech Republic (83%) – well above our 18 country average of 68%. With the exception of smartphone news access in Poland, in these countries the use

of mobile devices to access news is generally lower.

This pattern is emphasised by data relating to what respondents saw as their main digital news device. Here, we can see that the computer has a very strong lead in all cases, but especially in Poland (75%), Portugal (69%), and the Czech Republic (78%), with the preference for mobile devices (particularly tablets) very low. Taken together, this suggests that, although we are seeing a shift to mobile news access in many countries, this shift is taking place at different speeds across Europe.

PROPORTION THAT SAID EACH DEVICE WAS THEIR MAIN ONLINE NEWS DEVICE BY COUNTRY (ORDERED BY COMPUTER)



UK8b6_5. You've said you use the following devices to access news in the last week, which is your MAIN way of accessing online news?

Base: All who used a digital device to access news in the last week Poland = 1923, Czech Republic = 948, Austria = 854, Netherlands = 1753, Urban Turkey = 961, Portugal = 973, UK = 1795, Germany = 1554, Spain = 1819.

Note: Data for each country do not add up to 100% because the small proportion who selected another digital device as their main device for news is not shown.

THE IMPACT OF COST ON ACCESS

This difference in preferences for mobile devices is partly caused by the fact that our data show that overall access to them is lower in Poland, Portugal, and the Czech Republic when compared to our other countries. Overall access is likely to be heavily influenced by cost, and although there are many factors at play, it is probably no coincidence that Poland, Portugal, and the Czech Republic have, according to the International Monetary Fund (IMF), the lowest Gross Domestic Products (GDP) per capita of the nine countries compared here (if we exclude our data on Turkey, given that they are drawn from a more affluent urban population).⁸⁷

SMARTPHONE NEWS APP USE AHEAD OF TABLET

The provision of mobile apps is one way for publishers to close the gap between the preference for mobile devices and computers evident in some countries. Apps bypass the web and can be designed to make better use of available bandwidth and screen space, and are thus important for driving readership.

When we look at the proportion of smartphone/tablet users who use a news app we see that the figures for the Netherlands are higher for both smartphone (33%) and tablet (31%) than in any of the 18 countries surveyed in 2015. The availability of high-quality news apps from *De Telegraaf*, *NOS Journaal*, and *Nu.nl* is likely to have contributed to this, and helps explain why a relatively high number of Dutch respondents considered mobile devices their main source of news.










News app use for both devices is particularly low in Austria and Poland. In the Czech Republic, though usage is also low, tablet app use (17%) exceeded smartphone app use (14%), something we have only previously observed in Japan.

POPULARITY OF SMART TVS CHIMES WITH PREFERENCE FOR FIXED ACCESS

The focus on smartphones and tablets should not blind us to significant news use on other digital devices. Though it is too soon for smart watches to have been embraced by the mass market, and accessing news on e-readers has never been a popular choice, smart or connected TVs are now regularly used in many counties.

While use of these TVs – which often feature pre-loaded browsers and news apps – is low in the Netherlands (8%), elsewhere they are used for news by a large proportion when compared to the 18 country average of 12%. Use was particularly high in Poland (21%), making smart/connected TVs slightly more popular for news access than tablets (18%) in this market. The popularity of fixed broadband – manifest in high figures for computer use – is likely to be a contributing factor. However, it is also possible that a proportion of users who selected this option may not have used the available browsers or apps on these devices, and instead are just watching TV news in the traditional way.

PROPORTION OF DEVICE USERS THAT USE NEWS APPS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Smartphone	16%	14%	13%	33%	30%	21%	27%	18%	21%
Tablet	13%	17%	13%	31%	23%	21%	23%	16%	15%

Q8A. Which, if any, of the following devices do you ever use (for any purpose)? Please select all that apply.

Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select ALL that apply.

Base: All who accessed a smartphone/tablet in the last week Poland = 1203/601, Czech Republic = 498/296, Austria = 749/425, Netherlands = 1331/887, Urban Turkey = 742/425, Portugal = 563/350, UK = 1436/1102, Germany = 1285/716, Spain = 1658/906.

ALSO FROM 2015

SMARTPHONE USERS WITH NEWS APPS

HIGHEST

NETHERLANDS: 33%

LOWEST

AUSTRIA: 13%

18 COUNTRY AVERAGE

23%

TABLET USERS WITH NEWS APPS

HIGHEST

NETHERLANDS: 31%

LOWEST

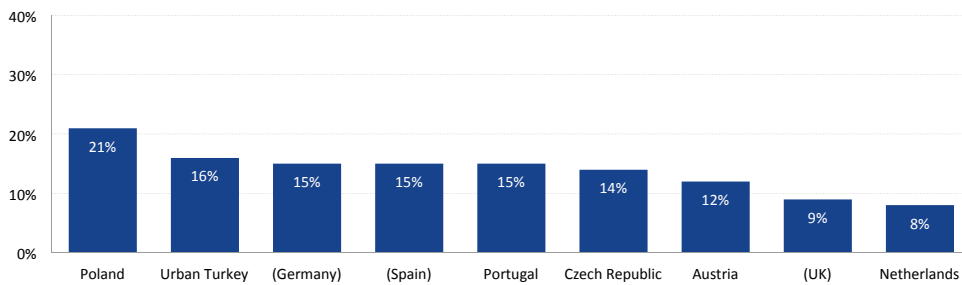
ITALY, POLAND & AUSTRIA: 13%

18 COUNTRY AVERAGE

19%

⁸⁷ <https://www.imf.org/external/pubs/ft/weo/2015/01/weodata/index.aspx>

PROPORTION THAT USE A SMART OR CONNECTED TV TO ACCESS NEWS BY COUNTRY



Q8B. Which, if any, of the following devices have you used to access news in the last week? Please select all that apply.
Base: Total sample in each country.

ALSO FROM 2015

SMART/CONNECTED TV FOR NEWS

HIGHEST

POLAND: 21%

LOWEST

JAPAN: 3%

18 COUNTRY AVERAGE










12%

4.2 NEW FORMATS

Online news no longer consists solely of text-based articles and lists of headlines. Though these remain the most popular ways of consuming online news, in the last few years, many news publishers have embraced a range of new formats. Some formats – such as quizzes, live blogs, and videos – have been enabled by the adaptability and interactivity of digital platforms. Others – such as lists and infographics – are a response to the demand from consumers for quick news in bite-sized chunks.

The adoption of new formats has been pioneered by digital-born brands, and their popularity is underpinned by sharing on social media, which allows the most creative or interesting uses of these formats to go viral. However, new formats are not the sole province of digital-born players, with some traditional brands now integrating them into their online news experience.

PROPORTION THAT USE EACH NEWS FORMAT BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Looked at a list of headlines	42%	51%	39%	29%	51%	43%	40%	34%	36%
Read news stories or articles	64%	77%	58%	45%	52%	60%	59%	54%	64%
Followed a live news page	26%	10%	8%	10%	29%	17%	12%	9%	19%
Read a news blog	8%	16%	8%	7%	21%	13%	9%	10%	16%
Looked at a gallery of pictures	27%	29%	19%	13%	26%	27%	17%	18%	23%
Viewed a news infographic	11%	8%	7%	4%	23%	4%	7%	8%	8%
Watched online news video	28%	21%	16%	15%	28%	22%	21%	18%	27%
Listened to online news audio	19%	13%	6%	6%	16%	18%	8%	8%	17%
Looked at a news list or top 10	11%	22%	5%	6%	27%	17%	11%	5%	10%

Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select ALL that apply.

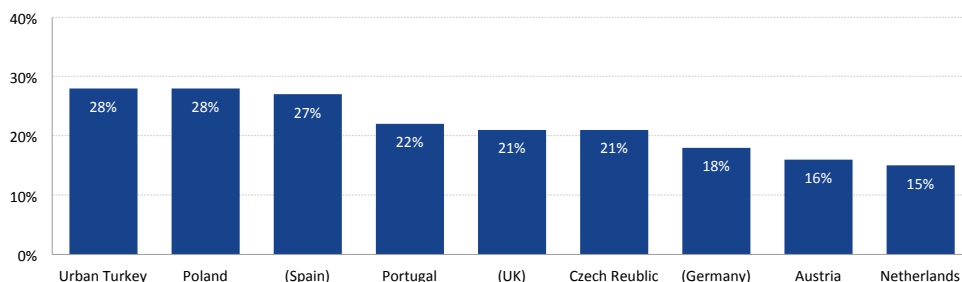
Base: Total sample in each country.

COMPARABLE FIGURES FOR ONLINE VIDEO NEWS ACCESS

New formats are less widely used in Austria and the Netherlands, but are particularly popular in Poland and urban Turkey. Among the most popular of these new formats are 'visual' media – including picture galleries and online

video news. Picture galleries and videos are particularly popular in countries with strong digital-born brands, such as Poland, urban Turkey, Portugal, and the Czech Republic. The proportion using online video in Poland (28%) and urban Turkey (28%) was second only to the US (30%) for the 18 countries surveyed in 2015. By contrast, the figure of 15% in the Netherlands was equal lowest with Japan.

PROPORTION THAT USE ONLINE NEWS VIDEO BY COUNTRY



Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select ALL that apply.
Base: Total sample in each country.

ALSO FROM 2015

ONLINE NEWS VIDEO

HIGHEST

US: 30%

LOWEST

JAPAN & NETHERLANDS: 15%

18 COUNTRY AVERAGE

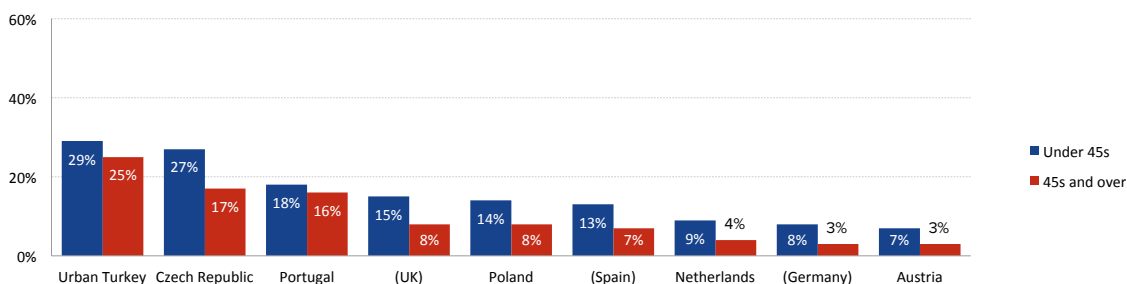
23%

LIST-BASED ARTICLES POPULAR WITH YOUNGER CONSUMERS

Consumers in urban Turkey (27%), Portugal (17%), and the Czech Republic (22%) also appear to be embracing list-based articles (or 'listicles' as they are sometimes referred to), with figures much higher than in Germany (5%), Spain (10%) and the UK (11%).

List-based articles are typically utilised heavily by digital-born brands because they are cheap to produce and often go viral on social media. As such, we see that they are typically more popular with younger age groups – but still used by over 5% of over-45s outside of Austria and the Netherlands.

PROPORTION OF UNDER 45s AND 45s AND OVER THAT USE LIST-BASED NEWS ARTICLES BY COUNTRY (ORDERED BY UNDER 45s)



Q11. Thinking of the way you looked at news online (via any device) in the last week, which of the following ways of consuming news did you use? Please select ALL that apply.

Base: Under 45s/45s and over Poland = 978/1037, Czech Republic = 486/537, Austria = 457/552, Netherlands = 854/1190, Urban Turkey = 732/309, Portugal = 517/532, UK = 802/1347, Germany = 806/1163, Spain = 1008/1018.

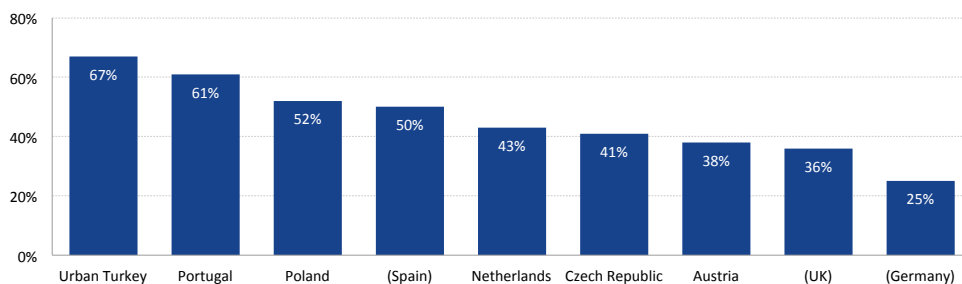
4.3 SOCIAL MEDIA

SOCIAL MEDIA A POPULAR SOURCE OF NEWS EVERYWHERE

Social media news use accounts for a considerable part of the total online figures. The proportion that use social media as a news source is generally large when compared to other European countries. 67% of our Turkish sample, 61% of our

Portuguese sample, and 52% of our Polish sample stated that they had used it as a source of news in the previous week, making it more widely used than both printed newspapers and the radio in these countries, though this is likely to be partly due to our online sample. Figures are lower in Austria (38%) and the Netherlands (43%), but are nonetheless higher than in Germany (25%) and the UK (36%).

PROPORTION THAT USE SOCIAL MEDIA AS A SOURCE OF NEWS BY COUNTRY



Q3. Which, if any, of the following have you used in the last week as a source of news? Please select all that apply.
Base: Total sample in each country.

ALSO FROM 2015

SOCIAL MEDIA FOR NEWS

HIGHEST

URBAN TURKEY: 67%

LOWEST

JAPAN: 21%

18 COUNTRY AVERAGE

44%

SOCIAL MEDIA AN IMPORTANT SOURCE OF NEWS IN TURKEY

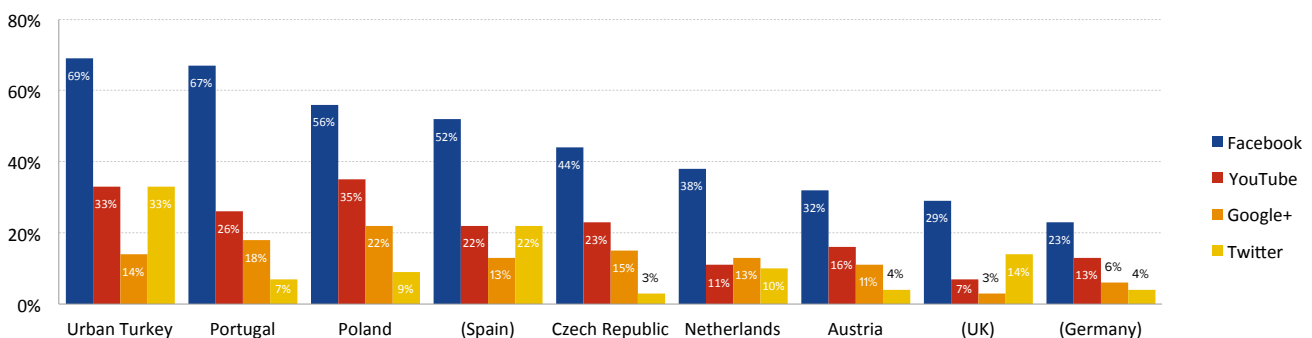
We know from our data from comparator countries that in most cases social media have become significantly more popular as a news source since 2013. Social media are particularly important in Turkey, and this is reflected in our figure of 67% – higher than any other country surveyed in 2015. Mainstream Turkish news sources are often subject to censorship, and social media enable the publication and dissemination of dissenting or alternative views. Since 2010, Turkish governments have made various attempts to restrict public access to some social networks, including Twitter and YouTube. However, attempts to block access have usually been short-lived, easily undermined, or otherwise unsuccessful.

FACEBOOK THE MOST USED SOCIAL NETWORK FOR NEWS

We have also tracked the most popular social networks for all activity surrounding the news in each country. The most commonly used social network for either finding, reading, watching, sharing, or discussing the news is Facebook, with YouTube, Google+, and Twitter in second, third, and fourth.

Twitter (and YouTube) use is high in urban Turkey (33%). Elsewhere, Twitter news use is low, even in countries such as Portugal (7%) and Poland (9%), where overall social media use is high. Google+ use was comparatively high in every country surveyed here, with figures higher than our 18 country average of 10% in all cases.

PROPORTION THAT USE EACH SOCIAL NETWORK FOR NEWS BY COUNTRY (ORDERED BY FACEBOOK)



Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.
Base: Total sample in each country.

ALSO FROM 2015

FACEBOOK FOR NEWS

HIGHEST

URBAN BRAZIL: 70%

LOWEST

JAPAN: 11%

18 COUNTRY AVERAGE

43%

YOUTUBE FOR NEWS

HIGHEST

POLAND: 35%

LOWEST

UNITED KINGDOM: 7%

18 COUNTRY AVERAGE

19%

GOOGLE+ FOR NEWS

HIGHEST

POLAND: 22%

LOWEST

UNITED KINGDOM: 3%

18 COUNTRY AVERAGE

10%

TWITTER FOR NEWS

HIGHEST

URBAN TURKEY: 33%

LOWEST

CZECH REPUBLIC: 3%

18 COUNTRY AVERAGE

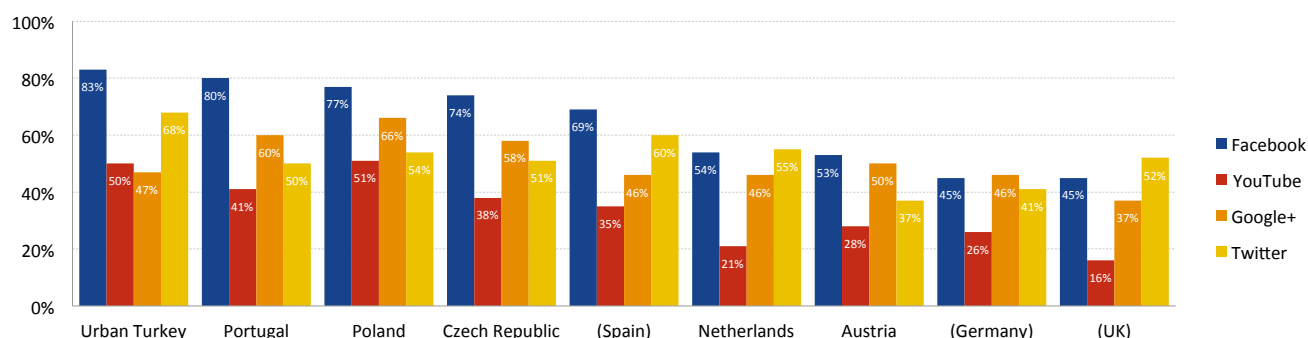
11%

TWITTER HIGHLY VALUED FOR NEWS

The above figures are heavily influenced by the general popularity of each social network. If we look instead at the proportion of users of each network that use it for news, the picture changes. Facebook is still ahead in Poland (77%), urban Turkey (83%), Portugal (80%), and the Czech Republic (74%), but this is likely to be due to the fact that users tend to 'bump into' news on Facebook, rather than seek it out.

This is in contrast to Twitter, which is now used by many high-profile journalists and politicians, and is increasingly seen as both a primary news source and a platform for conversations surrounding newsworthy events. YouTube – with its large user base and lack of a specific news focus – typically finds itself in fourth place.

PROPORTION OF USERS OF EACH SOCIAL NETWORK THAT USE IT FOR NEWS BY COUNTRY (ORDERED BY FACEBOOK)



Q12A. Which, if any, of the following have you used for any purpose in the last week? Please select all that apply.

Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.

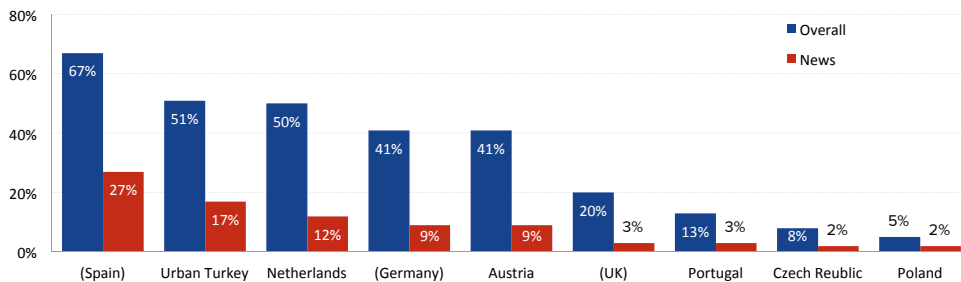
Base: All who used Facebook/YouTube/Google+/Twitter in the last week Poland = 1460/1389/671/332, Czech Republic = 615/601/267/53, Austria = 611/566/213/103, Netherlands = 1447/1043/599/359, Urban Turkey = 861/685/307/505, Portugal = 876/679/316/153, UK = 1396/1017/148/570, Germany = 1028/1013/243/179, Spain = 1537/1261/553/740.

WHATSAPP AN EMERGING NEWS PLATFORM

Additionally, our *Digital News Report* has identified WhatsApp – a messaging app with over 800 million global users – as an emerging news platform. We see some evidence of this here, but widespread use is limited to certain countries. In Austria (41%), urban Turkey (51%), and the Netherlands (50%), overall WhatsApp use is high, and news use has followed. It is, after

all, hardly surprising that a certain percentage of conversations between groups of friends feature the news in some way. In Poland (5%), Portugal (13%), and the Czech Republic (8%), WhatsApp is clearly yet to take off, and as a result overall news use is very low. For many, WhatsApp is not yet seen as a news destination, especially given the current lack of a dedicated publisher platform, which makes it difficult for media providers to use at scale.⁸⁸

PROPORTION THAT USE WHATSAPP AND AS A SOURCE OF NEWS BY COUNTRY (ORDERED BY OVERALL USE)



Q12A. Which, if any, of the following have you used for any purpose in the last week? Please select all that apply.

Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.

Base: Total sample in each country.

ALSO FROM 2015

WHATSAPP FOR NEWS

HIGHEST

URBAN BRAZIL: 34%

LOWEST

US, JAPAN & DENMARK: 1%

18 COUNTRY AVERAGE

9%










NEWS USE ON OTHER SOCIAL NETWORKS COMPARATIVELY HIGH AMONGST 18–24s

In addition to the most popular social networks, there are also a number of emerging players who – though they lack consistent popularity across all ages – are currently used for news by 18–24 year olds. These include Instagram, Tumblr, Reddit, and Snapchat. Some of these are beginning to introduce news features. For example, Snapchat has launched

its ‘Discover’ feature earlier this year, allowing users to directly access editorial from selected brands.⁸⁹

Instagram is comparatively popular in Portugal (9%) and urban Turkey (12%), and Snapchat is gaining some traction in Poland (4%). News use for these social networks is small (typically less than 2%) when we consider all age groups. However, there is a good chance that some of these networks will build a broader news appeal in the future.

PROPORTION OF 18–24s THAT USE EACH SOCIAL NETWORK FOR NEWS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Instagram	6%	5%	3%	4%	12%	9%	5%	5%	8%
Tumblr	4%	1%	2%	4%	2%	4%	5%	1%	2%
Reddit	3%	0%	4%	3%	2%	2%	5%	2%	3%
Snaphchat	4%	2%	1%	2%	4%	2%	2%	1%	2%

Q12B. Which, if any, of the following have you used for finding, reading, watching, sharing or discussing news in the last week? Please select all that apply.

Base: 18–24s Poland = 249, Czech Republic = 107, Austria = 109, Netherlands = 222, Urban Turkey = 203, Portugal = 108, UK = 228, Germany = 170, Spain = 186.

⁸⁸ <http://www.themediabriefing.com/article/how-the-bbc-is-harnessing-mobile-apps-to-engage-global-audiences>

⁸⁹ <http://blog.snapchat.com/post/109302961090/introducing-discover>










4.4 PATHWAYS AND DISCOVERY

SEARCH AND DIRECT ACCESS THE MOST COMMONLY USED PATHWAYS TO ONLINE NEWS

In many of the countries featured in the *Digital News Report* – such as Denmark, Finland, and the UK – the continued strength of certain brands means that directly accessing a website remains the most commonly used pathway to online

news content. We can now add the Netherlands (43%) to the list of countries that most frequently access online news in this way. Elsewhere, arriving at news through use of a search engine is the most frequently used pathway. The very high figure of 44% for the use of news aggregators in the Czech Republic is likely to be due to the popularity of Seznam; a search engine and web portal whose news section consists of links to Czech news sources operated by the Borgis group.

PROPORTION THAT USE EACH PATHWAY TO ONLINE NEWS BY COUNTRY

	 POL	 CZE	 AUT	 NLD	 TUR	 POR	 (UK)	 (GER)	 (SPA)
Direct to a news brand	30%	38%	20%	43%	39%	18%	52%	26%	36%
Search	65%	59%	50%	24%	67%	55%	32%	45%	54%
Social media	41%	34%	29%	34%	46%	46%	28%	20%	35%
Email	17%	17%	19%	20%	16%	37%	10%	15%	14%
Mobile notifications or alerts	7%	4%	5%	15%	19%	16%	10%	9%	8%
News aggregators	7%	44%	4%	3%	15%	5%	4%	5%	11%

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.

Base: Total sample in each country.

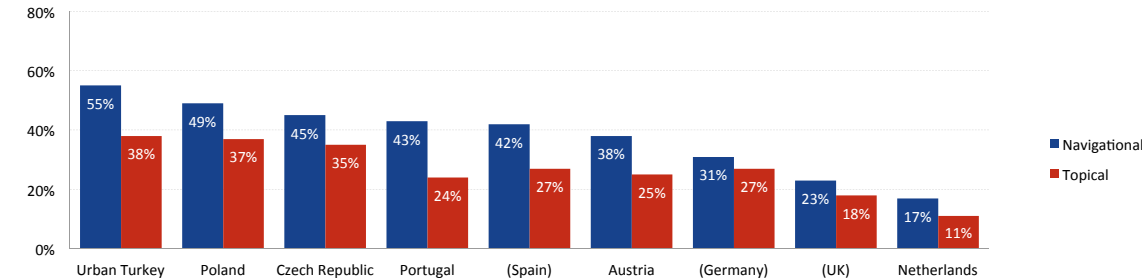
SEARCH ENGINES USED FOR NAVIGATING TO NEWS BRANDS

Search engines can either be used to search for news based on topic keywords, or as a navigational tool that allows rapid access to a user's preferred websites; or, indeed, a combination of the two. Our data show that search engines are more frequently used for navigational purposes than for topics in every country. What is more, everywhere other than the Netherlands (and the UK), using a search engine for

navigation is in itself more popular than direct access.

This should be understood against the backdrop of the introduction of 'smart' or 'predictive' address bars in many browsers that have fused search and address fields, blurring the distinction between direct access and search navigation. Furthermore, as users adapt to the increasing sophistication of search algorithms, it is likely that these classifications will break down.

PROPORTION THAT USE SEARCH TO NAVIGATE TO NEWS WEBSITES AND TO SEARCH FOR SPECIFIC NEWS STORIES BY COUNTRY (ORDERED BY NAVIGATIONAL)



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.

Base: Total sample in each country.

SOCIAL MEDIA AN IMPORTANT PATHWAY FOR THOSE LESS INTERESTED IN NEWS

Social media are now a key news pathway. In most countries they are more popular than direct access, and are particularly popular with younger consumers. Given that users often encounter news on social media whilst there for other reasons,

it is also an important news gateway for those with a low interest in the news. If we look at the data from Poland and the Netherlands, we can see that those with higher interest levels are more likely to search for news than those with low levels of interest, whereas on social media interest makes little difference; with social media often a more common pathway for those not particularly interested in the news.

PROPORTION WITH EACH LEVEL OF INTEREST IN THE NEWS THAT USE SEARCH AND SOCIAL MEDIA AS A NEWS PATHWAY NETHERLANDS

	Extremely interested	Very interested	Somewhat interested	Not very interested	Not at all interested
Search	37%	27%	18%	20%	-
Social media	35%	31%	37%	34%	-



POLAND

	Extremely interested	Very interested	Somewhat interested	Not very interested	Not at all interested
Search	68%	69%	63%	33%	-
Social media	36%	42%	41%	41%	-



Q1c. How interested, if at all, would you say you are in news?

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.

Base: Extremely/Very/Somewhat/Not very interested Netherlands = 215/962/789/68, Poland = 277/925/735/69.

Note: Figures for 'Not at all interested' not shown as there were fewer than 10 respondents in this category.

4.5 PARTICIPATION AND ENGAGEMENT ONLINE

Our survey asked respondents about how they participate and interact with online news. Though generally more 'open' than respondents in Germany and the UK, those in Poland and the Czech Republic – and particularly Austria and the Netherlands – typically appear more reserved than respondents in urban Turkey and Portugal. However, rating stories and online voting are popular in Poland and the Czech Republic.

Those in urban Turkey and Portugal engage with the news much more. Whilst we know that the Portuguese are avid social media users, the centrality of social media to many of Turkey's recent political controversies likely underpins these high participation levels.

PROPORTION THAT ENGAGE WITH THE NEWS IN EACH WAY BY COUNTRY

	POL	CZE	AUT	NLD	TUR	POR	(UK)	(GER)	(SPA)
Share news via social media (SM)	26%	26%	17%	16%	42%	46%	14%	13%	34%
Share news via email	19%	18%	10%	7%	20%	27%	7%	10%	21%
Rate or like a news story	26%	26%	18%	9%	27%	21%	8%	14%	32%
Comment on news via SM	24%	21%	13%	12%	39%	36%	13%	11%	32%
Comment on a news website	13%	7%	7%	6%	25%	9%	7%	6%	12%
Write a news blog	1%	1%	3%	2%	8%	2%	1%	2%	5%
Post a news picture to SM	9%	7%	8%	6%	26%	14%	4%	6%	17%
Post a picture to a news website	4%	1%	5%	3%	12%	7%	1%	4%	7%
Vote in an online poll	30%	28%	20%	8%	28%	16%	15%	14%	21%
Campaign online	6%	2%	6%	3%	13%	5%	5%	6%	7%
Talk to friends online about news	23%	20%	15%	17%	31%	36%	16%	15%	32%
Talk about news face-to-face	46%	55%	43%	33%	41%	50%	42%	40%	48%

Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply.

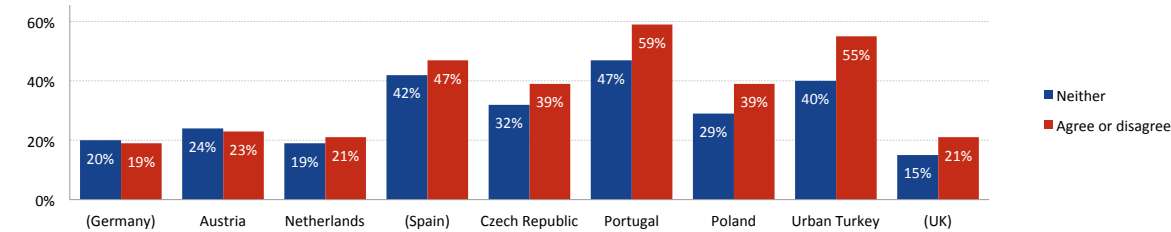
Base: Total sample in each country.

TRUST AND DISTRUST DRIVE NEWS SHARING

We also found that sharing news (either by email or social media) is often influenced by trust. We found that, everywhere other than the Netherlands and Austria (where sharing is generally low), those who either trust or distrust the news are more likely to share news via email or social media than those who are neutral.

What is more, there is no significant difference in sharing between those who trust and those who distrust. This highlights that sharing a news story can denote either approval or criticism, and chimes with theories proposing that engagement with the news online encourages a form of collaborative verification, where consumers have a role to play in verifying news stories.⁹⁰

PROPORTION THAT TRUST/DISTRUST AND NEITHER TRUST/DISTRUST THEIR NEWS WHO SHARE IT BY COUNTRY (ORDERED BY DIFFERENCE)



Q6b. Thinking specifically about news sources that you use, do you agree or disagree with the following statement? 'I think I can trust most of the news that I use most of the time'

Q13. During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply.

Base: All who neither agree nor disagree/agree or disagree Poland = 405/1610, Czech Republic = 324/699, Austria = 274/735, Netherlands = 610/1434, Urban Turkey = 228/813, Portugal = 168/881, UK = 459/1690, Germany = 429/1540, Spain = 573/1543.

⁹⁰ A. Hermida, 'Tweets and Truth: Journalism as a Discipline of Collaborative Verification', *Journalism Practice*, 6/5–6 (2012), 659–68.

CONCLUDING REMARKS

Our survey shows that online news is commonly accessed in Poland, the Czech Republic, Austria, the Netherlands, urban Turkey, and Portugal. At the same time, our data also highlight that traditional sources – particularly TV – remain important, with TV often remaining the primary source of news. The resilience of traditional platforms – and of their digital brands – has created a crowded news landscape, with many consumers regularly accessing a wide range of news sources across a variety of platforms.

This plurality of consumption has had an inevitable impact on media business models. As in other markets, news providers face challenges in attracting – and retaining – the attention of audiences, as well as monetising their offerings.

We see that patterns of news consumption are influenced by a number of demographic variables. Perhaps most striking is the division we see in every country between an overwhelming preference for online news among younger age groups, compared to a clear preference for TV within the older age groups. Underneath this, we also see further, subtler differences in the way different groups consume the news.

Alongside this, whilst it is undoubtedly possible to observe similarities in patterns of news consumption between countries in close geographical or cultural proximity, clear differences typically prohibit simple groupings or classifications.

Though broad trends, such as the rise of smartphone news access, the decline of print, and the reluctance to pay for online news, are generally visible across Europe, our 2015 snapshot appears to capture countries at different stages of this digital evolution. For example, the desktop/laptop computer, not the smartphone, is the defining digital news

device in Poland, Portugal, and the Czech Republic. Future surveys will allow us to see whether or not this is changing – and if so, how quickly.

In examining the media landscapes of these six countries, we also see features that we have not typically seen elsewhere in Europe. The centrality of domestic, language-specific, digital-born news sources – particularly in Poland, Portugal, Turkey, and the Czech Republic – is one example.

The news landscape in these countries is clearly complex and varied. Differing digital realities mean that the solutions required to prosper in these national markets will also often be specific to a given country.

Future research will help shed some light on the digital journey undertaken by these six nations, including whether their market characteristics become increasingly aligned, or more in line with other countries with a similar level of digital diffusion.

Irrespective of these differences in national markets, many of the same strategic issues need to be addressed by media companies. In particular, with many global digital-born and traditional brands now intent on capturing international audiences, how will the online news readership of domestic brands be affected? And what role will the big international social media platforms play in creating pathways to particular news sources?

Alongside this, publishers are also facing the challenges created by declines in advertising revenue compounded by a general reluctance to pay for online news. How they respond to this, and the impact that this will have on digital news behaviours, will be a fascinating story to watch unfold.

POSTSCRIPT AND FURTHER READING

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

RELEVANT SURVEYS AND REPORTS

Reuters Institute, *Digital News Report 2015* (June 2015)

https://reutersinstitute.politics.ox.ac.uk/sites/default/files/Reuters%20Institute%20Digital%20News%20Report%202015_Full%20Report.pdf

Interactive charts and more can be found at: <http://www.digitalnewsreport.org>

BBC, *Future of News Report* (Jan. 2015)

http://newsimg.bbc.co.uk/1/shared/bsp/hi/pdfs/29_01_15future_of_news.pdf

European Journalism Centre, expert summaries and analyses of the state of media in each European country as well as its neighbouring states (undated)

http://ejc.net/media_landscapes

Ipsos Mori Global Trends Report

http://www.ipsosglobaltrends.com/files/gts_2014_web.pdf

New York Times Innovation Report (March 2014)

<http://www.scribd.com/doc/224608514/The-Full-New-York-Times-Innovation-Report#scribd>

Ofcom, *News Consumption in the UK 2014* (June 2014)

<http://stakeholders.ofcom.org.uk/market-data-research/other/tv-research/news-2014>

Ofcom, *The Communications Market Report* (Aug. 2015)

<http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr15>

Ofcom, *The Communications Market Report: International* (Dec. 2015)

http://stakeholders.ofcom.org.uk/binaries/research/cmr/cmr14/icmr/ICMR_0.pdf

Oliver & Ohlbaum Associates Ltd, RISJ, and Oxford Internet Institute (for Ofcom), *Measuring Online News Consumption and Supply* (July 2014)

<http://stakeholders.ofcom.org.uk/binaries/internet/Measuring-online-news.pdf>

Pew Research Center, *Digital Life in 2025* (Mar. 2014)

<http://www.pewinternet.org/2014/03/11/digital-life-in-2025>

Pew Research Center's Project for Excellence in Journalism, *The State of the News Media* (2015)

<http://stateofthemedias.org>

PwC, *Global Entertainment and Media Outlook: 2015–2019* (June 2015) (NB: contains a mixture of free and subscriber-only insights)

<http://www.pwc.com/gx/en/global-entertainment-media-outlook>

TNS, *Connected Life 2014* (July 2014) (NB: interactive website of key findings, full report is only available to subscribers)

<http://connectedlife.tnsglobal.com>

OTHER RELEVANT PUBLICATIONS

All available: <http://reutersinstitute.politics.ox.ac.uk/publications/risj.html>

Lucy Küng, *Innovation in Journalism Organisations: An International Perspective* (I.B.Tauris, 2015).

David A. L. Levy and Rasmus Kleis Nielsen (eds), *The Changing Business of Journalism and its Implications for Democracy* (RISJ, 2010).

John Lloyd and Laura Toogood, *Journalism and PR: News Media and Public Relations in the Digital Age* (I.B.Tauris, 2014).

Rasmus Kleis Nielsen, *Ten Years that Shook the Media World: Questions and Trends in International Media* (RISJ, 2012).

Kellie Riordan, 'Accuracy, Independence, and Impartiality: How Legacy Media and Digital Natives Approach Standards in the Digital Age', journalist fellow paper (RISJ, 2014).

Richard Sambrook, *Delivering Trust: Impartiality and Objectivity in the Digital Age* (RISJ, 2012).

Richard Sambrook, Simon Terrington, and David A. L. Levy, *The Public Appetite for Foreign News on TV and Online* (RISJ, 2013).

Martha L. Stone, *Big Data for Media* (RISJ, 2014).



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