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Trust

in news

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SURGING APPETITE FOR NEWS DRIVEN BY 18-34s:

Among news audiences in general, 39% are using a greater number of news sources in 2017 than 2016. This rises to 49% among 18-34 year-olds, who are also the group accessing news across the largest number of sources.

ONLINE NEWS AND TV DOMINATE AS THE NEWS MEDIA OF CHOICE:

At 78%, the proportion of news audiences who consume news online (via any platform) is now comparable to the proportion watching news on broadcast TV channels (76%). Among 18-24s, the proportion consuming news via social media is the same as the proportion watching it on TV channels (67%).

NATIONAL NEWSPAPER BRAND AUDIENCES ARE DISPLAYING A STRONG INTEREST IN POLITICS:

72% of national newspaper brand audiences (across any platform) are interested in politics vs 59% of news audiences in general.

News is as viable a content offering as it ever has been, particularly among 18-34 year-olds. News organisations are well positioned to capture the audience attention that advertisers demand. Find out more on page 8

Trust in News

TRUST IN NEWS - A FUNDAMENTAL OF DEMOCRACY UNDER THREAT:

While nearly three quarters of news audiences believe that accuracy in journalism is key to a healthy democracy, only 56% trust that what they read is true and not fake "most of the time."

TRUST IN MAINSTREAM NEWS BEATS ONLINE:

Printed news magazines are the most trusted news source (72% of consumers of this news media type rate them positively), closely followed by 24-hour TV news, television news bulletins and programmes, radio bulletins and national newspapers. Conversely, just 33% of those who consume news on social media agreed that it 'provides news I can trust'.

PROVIDING IN DEPTH COMMENTARY AND ANALYSIS IS A KEY DRIVER OF TRUST:

Providing in depth commentary and analysis is the key functional driver of trust in news. Print magazines, national newspapers and 24 hour news channels are rated best for providing in depth commentary and analysis.

Trust in journalism is crucial to how news audiences view the world. Mainstream news has the salience to engage news audiences through editorial integrity and quality content. Find out more on page 14

Distributing News

DISTRIBUTION vs DESTINATION STRATEGY REMAINS CRITICAL:

42% of news audiences visit news sites or apps directly, while discovery of content distributed through social media comes a close second at 36%. Nearly two thirds of social news consumers do notice which news organisation provides the content they are reading socially.

PARTICIPATION AND ACCESS DRIVE SOCIAL NEWS:

43% consume news socially to access a wide variety of news sources, while 40% do so to take in very different views to their own.

SHARING THE NEWS INDISCRIMINATELY IS A SIGNIFICANT HABIT:

While sharing stories is a key news activity on social media, 18% have shared a story after only reading the headline and not the content.

Opportunities are being created for mainstream news publishers and digital platforms alike as a result of news audiences' appetite to share and participate in the conversation around the news. News organisations must weigh up the benefits of extending reach off-platform against the monetization opportunities of bringing audiences on-platform.
Find out more on page 18

Monetizing News

THE FINANCIAL PREDICAMENT OF NEWS ORGANISATIONS IS A REAL CONCERN FOR MANY:

44% are concerned that some news organisations may go out of business, meaning less choice for them. This rises to over half (52%) of 18-34 year-olds.

THE ANSWER? LOOK TO UNDER 35s:

42% of 18-34 year-olds paid for online news content in any form in the past year, almost double the proportion among those aged 35+ (22%). Younger audiences are in general more sympathetic to the idea, and twice as likely to feel a sense of duty to support independent journalism.

TRUST INCREASES PROPENSITY TO PAY FOR NEWS:

Among those who trust newspaper brands, 26% pay for an ongoing subscription to an online news service (from any source), compared with 17% of news audiences overall.

The sense of duty that younger audiences have to pay for online news at the right price point must be capitalised upon to convert them from one-off payments to ongoing subscribers. Find out more on page 24

Fake News

TRUST IN MAINSTREAM NEWS HAS SUFFERED LESS THAN DIGITAL SPECIALISTS IN THE WAKE OF FAKE NEWS:

24% say that they will trust coverage of politics and elections less in mainstream news as a result of becoming aware of fake news (18% will trust it more, and 59% the same as before). For social media the figures are starker: 58% will trust it less in the wake of fake news.

THERE IS NO CONSENSUS ON THE DEFINITION OF FAKE NEWS:

58% of news audiences believe that fake news is a story that has been deliberately fabricated by mainstream news organisations, while only 42% believe it to be a story that has been put out by someone pretending to be a news organisation.

US AND BRAZIL MOST LIKELY TO BELIEVE FAKE NEWS HAS INFLUENCED OUTCOME OF THEIR OWN ELECTIONS:

The majority of US and Brazilian news audiences believe that fake news has impacted the results of elections in their own countries, while those in the UK and France feel that it has had more impact outside their own countries.

Mainstream news organisations must leverage their reputation and trusted status to give news audiences the confidence they need to tackle fake news, while digital platforms must rebuild trust by providing users with the tools to identify fabricated stories. Find out more on page 30

Future of News

CREDIBLE SOURCES, REGULATION AND TECH TO SIFT THE FAKE FROM THE TRUE:

44% believe that audiences choosing to access more credible news content is the most effective way to tackle fake news.

APPETITE FOR PERSONALISED CONTENT AMONG YOUNGER AUDIENCES:

53% of 18-34 year-olds want news content personalized based on what they have previously read.

LIVE AND EXCLUSIVE: THE FUTURE OF NEWS VIDEO AND TV ONLINE:

63% watch online news video to access exclusive content that they can't see on TV.

Fake news presents a tremendous opportunity for mainstream news organisations to assert the integrity and credibility of their journalism. New storytelling techniques and content delivery mechanisms will enable quality content to thrive.
Find out more on page 36

Introduction

The shifting and nuanced nature of audience relationships with news has never been of so much commercial and social importance to news organisations, audiences, advertisers and governments as it is today.

The global news industry is caught in a perfect storm of deficits: a deficit of attention as consumer media consumption habits are fragmented across multiple devices and channels; a deficit of revenue as print circulation and advertising declines and digital revenue is syphoned off towards increasingly dominant online players; and most importantly a deficit in trust as evidenced by the seismic political events of the past twelve months and the proliferation of fake news online.

However, out of this perfect storm comes a host of new opportunities for news organisations: opportunities to provide news audiences with the credible and trusted content that they crave, while engaging with younger, socially-engaged audiences whose media consumption habits are almost unrecognizable from those of previous generations. With nearly half of 18-34 years olds using a greater number of news sources in 2017 than in 2016, decisions on how to monetize and distribute news in a way that satisfies this burgeoning demand are of paramount importance.

While fake news is technically far from a new phenomenon – propaganda and spin have been around for centuries after all – its modern incarnation in the form of fabricated news stories created by bogus news organisations proliferates rapidly via social channels. The demonstrable impact that fake news has had on recent elections and referendums across the globe has brought its influence into sharp focus.

Our research shows that fake news has had a far more detrimental impact on trust in online only and social media than it has on mainstream news organisations, with the latter clearly having a greater reputation for producing quality content and subsequent reserves of trust on which to draw. In fact printed news magazines come top for trust, with 72% of those who consume this news media type rating them highly on this metric versus just 33% who do so for social media. However, the influence of fake news extends beyond shaping consumer attitudes and opinions. It has spawned a new breed of click-bait articles that exist with the sole purpose of generating page impressions (enabled by the 18% of social media news consumers who have shared a story after only reading the headline and not the content), ad impressions, click-throughs and ad revenue, irrespective of the financial impact on quality news organisations and concerns around brand safety for advertisers.

It is in this sense that the issue of trust in news needs to be explored more holistically. Fake news is a real issue but it is merely one aspect of a broader narrative for news organisations as they face a precarious balancing act between fulfilling their social purpose and monetizing their audiences as effectively as possible in the new digital economy. While 53% of 18-34 year-olds who have accessed news online in the past week want news content personalized based on what they have previously accessed, two-thirds of online news consumers worry that personalization inhibits the breadth of content that they accessed. This shows that no strategic distribution decision is straightforward for news organisations and each comes with its own trade-off.

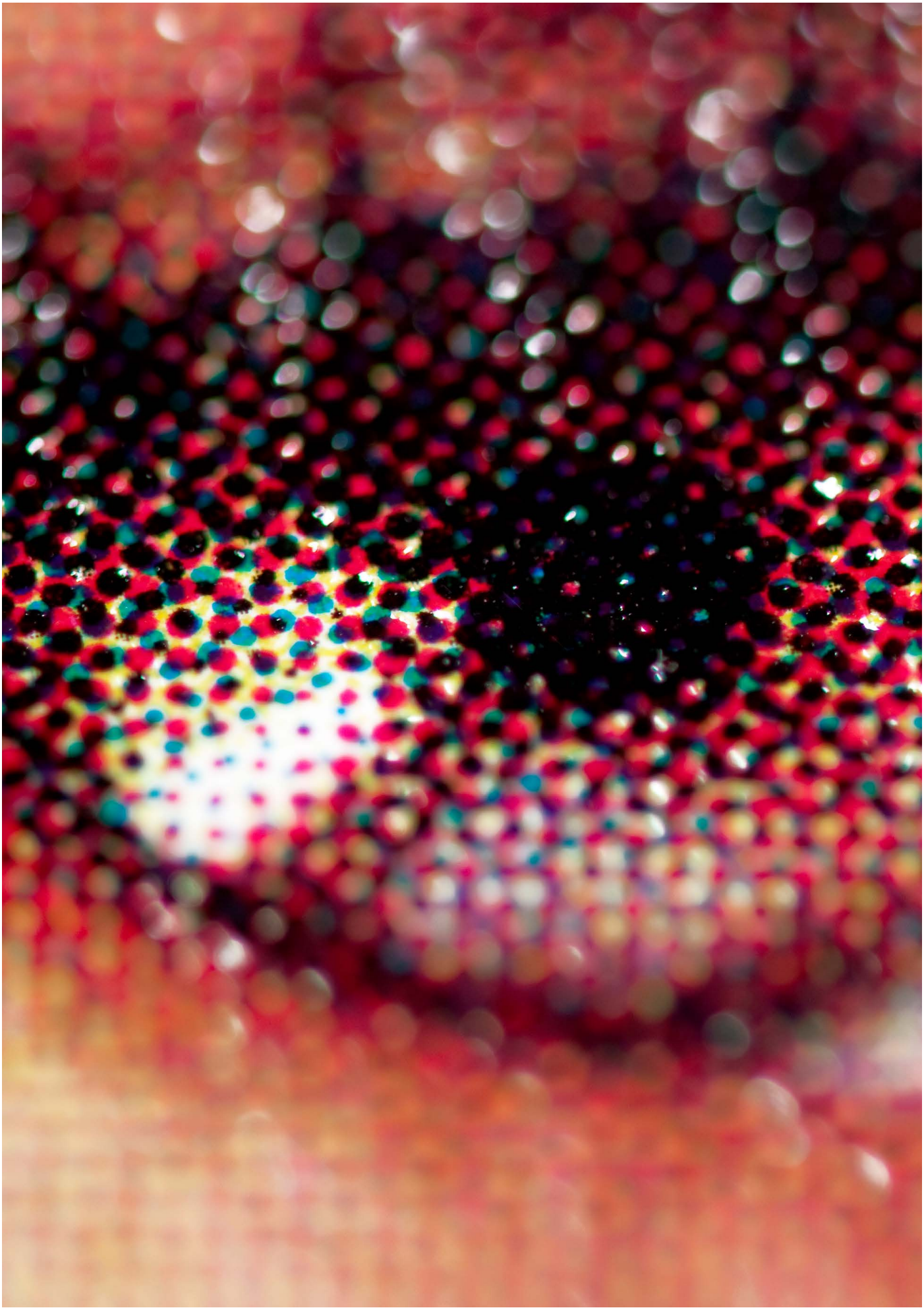
This study examines how audiences in the US, France, Brazil and the UK are consuming news from both a behavioural and attitudinal point of view. It will explore the themes of trust in the news and how this relates to news monetization, distribution and brand perception. News engagement, platform usage and how personalization and curation influence our strength of relationship with the news are all topics that will be touched upon.

A multi-country consumer survey

This report focuses on an 8,000-strong survey of news audiences split evenly between the UK, US, France and Brazil. The interviews were conducted online by Kantar between the 2nd and 10th June 2017. The majority of analysis in this report focuses on average scores across the four countries, however, where significant regional differences are noted, these have been highlighted.

News audiences are defined as anyone who had read/seen/heard the news at least once in the past week. Their profile and corresponding demographic quotas for recruitment were determined using data from Kantar Media's TGI consumer survey in each region.

National newspaper brands are defined as the entire offline and online publishing platforms of what were once seen to be mainstream print newspaper publishers.



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Interest in the News

The news agenda of the last eighteen months has been claimed by many to have ignited a resurgence in engagement with current affairs that has all too often been missing in recent years. Yet while the fiercely contested elections in the US, UK and France have undoubtedly dominated their respective media landscapes, is this assessment of renewed interest in the news accurate?

Fast Facts

SURGING APPETITE FOR NEWS DRIVEN BY 18-34s:

Among news audiences in general, 39% are using a greater number of news sources in 2017 than 2016. This rises to 49% among 18-34 year-olds, who are also the group accessing news across the greatest number of sources.

ONLINE NEWS AND TV DOMINATE AS THE NEWS MEDIA OF CHOICE:

At 78%, the proportion of news audiences who consume news online (via any platform) is now comparable to the proportion watching news on broadcast TV channels (76%). Among 18-24s, the proportion consuming news via social media is the same as the proportion watching it on TV channels (67%).

NATIONAL NEWSPAPER BRAND AUDIENCES ARE DISPLAYING A STRONG INSTEREST IN POLITICS:

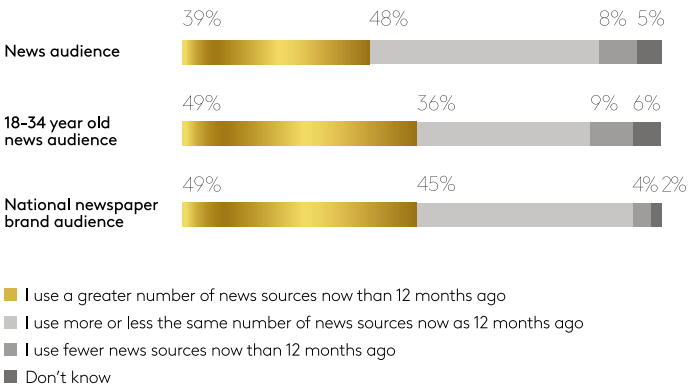
72% of national newspaper brand audiences (across any platform) are interested in politics vs 59% of news audiences in general.

Interest in the News

1. Surging appetite for news driven by 18-34s

Interest in the news is on the rise among news audiences, with nearly two in five using more news sources in 2017 than they were in 2016. This trend has primarily been driven by younger audiences with nearly half of 18-34 year-olds recording an increase in sources used. National newspaper brand readers are also displaying a high commitment to news and overall it is clear that more than ever there seems to be an insatiable appetite for keeping up to date with world events.

Figure 1.1a: How number of news sources used has changed

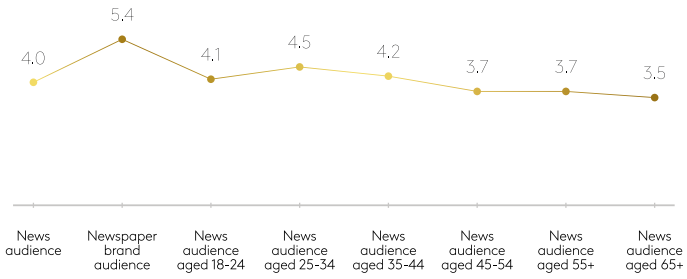


Question: Thinking about the ways in which you access the news, which of the following is true? Base: News audiences = 8000

News audiences across the four countries use an average of four different types of media for news each week (e.g. out of TV, radio, print, online etc...), while for national newspaper brand audiences, this figure increases to 5.4. National newspaper brand consumption is a clear indicator of news appetite overall.

Age is a factor when it comes to repertoire, with the average number of media types used being lower for older audiences. While there is no particular demographic group that has reported an overall reduction in news sources used in the last twelve months (perhaps suggesting that talk of filter bubbles restricting news consumption might be over-hyped), there is a clear indication that enthusiasm for news content is being increasingly driven by the 18-34 year old age group.

Figure 1.1b: Average number of media types used for news



Question: Which of the following have you used in the past week as a source of news? Base: News audience in all markets (n=8000); sub-group bases all >1000

Implications

News is as viable a content offering as it has ever been, commanding the consumer attention that brands and advertisers crave. Increased participation from younger voters in the 2017 UK election, for example, points to a world where Generation Z[1] is engaging with current affairs topics across a wide range of established and new media outlets providing exciting opportunities for news organisation to capitalise on this trend.

This is good news for media owners seeking proof points to market their premium audiences (in this case, 18-34 year-olds who are highly engaged and attentive in quality contexts) to advertisers. Ad measurement and verification initiatives that prove the value of campaigns running in quality contexts will increasingly provide the data needed to trade such audiences at the premium they deserve.

2. Online News & TV dominate as the News Media of Choice

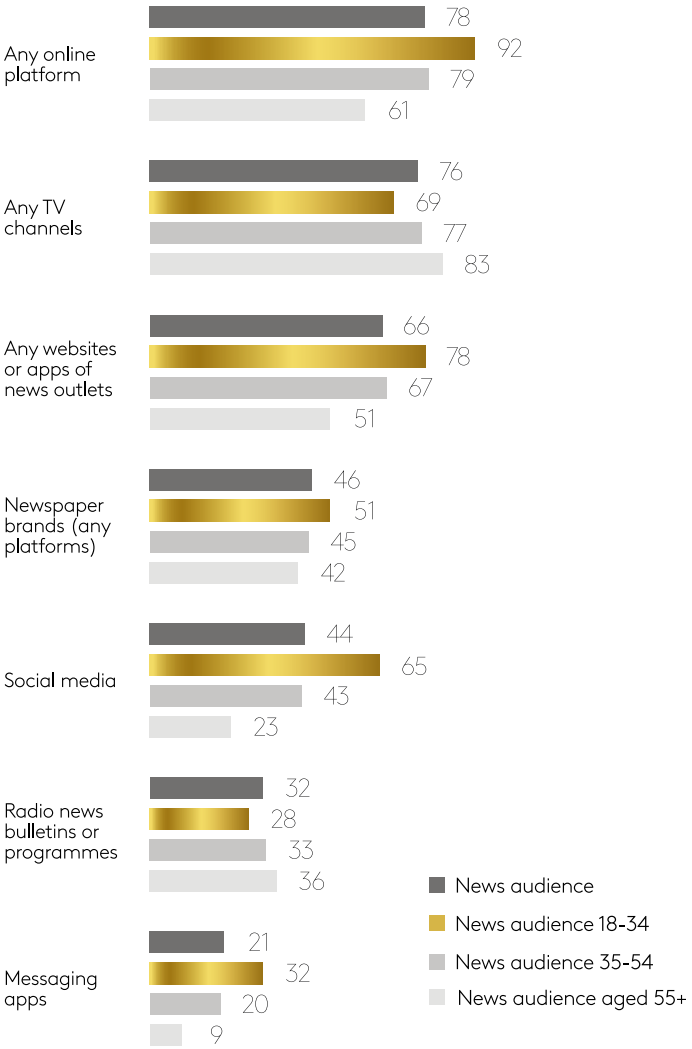
Online news, in all its various forms, is the medium of choice for news audiences. 78% access news via any online platform, whether the websites or apps of mainstream newspapers, TV and radio organisations, or through online only news channels or social media. As can be seen in the chart below, this trend is driven by 18-34 year-olds, 92% of whom are accessing online news, vs 61% of 55+ year-olds.

While over three-quarters also use TV (either news bulletin shows or 24 hour news channels), national newspaper organisations– at 46% - hold a highly relevant position in the news consumption landscape, although social media is now virtually comparable.

The popularity of online news amongst younger audiences has seen news organisations that may typically be considered niche overall, grow and deepen relationships with this core demographic. While only 4.2% of online news consumers overall use Vice online for example, this figure is double for 18-34 year olds – an age group which accounts for 80% of Vice's online audience overall.

Online news consumption is a truly multiplatform experience with news audiences across the four countries covered in this report accessing via laptop, desktop, smartphone and other mobile devices. Younger audiences have a far greater propensity to use mobile than older audiences with 81% of 18-34 year-olds accessing news this way vs 30% of 55+ year-olds.

Figure 1.2a: Types of media used for news in the last week, by age (%)



Question: Which of the following have you used in the past week as a source of news?
Base: News audience in all markets (n=8000), news audience aged 18-34 in all markets (n=2700), news audience aged 35-54 in all markets (n=2980), news audience aged 55+ in all markets (n=2320)

Figure 1.2b: Devices used to access news content in the last week

67% access the news on a laptop/ desktop

58% access the news on a smartphone

26% access the news on a tablet

Question: Which of these devices have you used to access news in the last week?
Base: News audience in all markets (n=8000)

"Mobile first" has been the mantra of many news organisations for a few years now, with many employing editorial content management tools that ensure journalists and editors are sense-checking how their stories are read on mobile before any other platform. Conscious of the relationships that news audiences have with their mobile devices, Google and Facebook have introduced fast loading article formats (AMP and Instant Articles respectively) that attempt to satisfy consumer demand while doing justice to mainstream news organisations' editorial brands, further driving growth in mobile news consumption.

Implications

The multi-platform content consumption habits of news audiences are now an accepted feature of the media landscape, yet at the same time cross-platform measurement, both of media and advertising, is still the exception rather than the norm. News organisations that do not have the luxury of expansive cross-device

1= Generation Z are defined as those born between the mid 1990's and mid 2000's

sign-in data, like Facebook, must take a holistic view of media measurement and either partner with third parties or build the tools to effectively measure cross-device exposure. Furthermore, independent measurement is required to ensure that the industry has comparable metrics to assess impact across all platforms and media. Similarly, PR agencies should think holistically when monitoring media impact for client brands, layering online insight on top of insight gathered from mainstream news.

3. Strong interest in politics among national newspaper brand audiences

While it would appear that interest in news has never actually gone away, and that it has merely shifted to new online platforms and devices, it is important to tease out how interested news audiences actually are in reading content about what's going on in the world around them, or whether the record-breaking traffic enjoyed by online news in the last decade is in fact attributable to a broader shift in general towards online content consumption.

Three of the four countries included in this study had national elections in the past twelve months, so it is timely to gauge interest in politics. Among news audiences in general, nearly three out of five claim some degree of interest in politics. National newspaper brand audiences record a higher than average interest at 72%. Mainstream newspaper brands attract some of the most engaged news audiences across all countries and although Brazil has not had an election in the past year, the political crisis in the country is ongoing, and consumer interest in politics is ahead of that in the UK, France and US.

Figure 1.3a: News audience's interest in politics (top 2 boxes)

Figure 1.3b: Newspaper brand audience's interest in politics (top 2 boxes)

Question: How much interest do you generally have in what's going on in politics? Percentage shown refers to top 2 box net scores. Base: News audience in all markets (n=8000), news audiences in individual markets (n=2000 per market), newspaper brand audience in all markets (n=3679), newspaper brand audience in individual markets (n=600+ per market)

Implications

While the political upheaval of 2016 and 2017 across all countries could be a factor in the majority of respondents claiming high levels of interest in politics, national newspaper brands need to capitalise on the considerably higher than average levels of interest shown among their readership and harness this enthusiasm, both to engage with existing audiences and to appeal to new, younger readers. Capitalising on a rich heritage in news storytelling - as the likes of the New York Times, Le Monde, The Times and O Globo, among many others, do - at a time when there is a thirst for more content than ever is a must.

The big digital platforms have developed successful methods of engaging news audiences with mobile content (particularly appealing to 18-34 year-olds) through news focused product development. In future, further collaboration between mainstream news organisations and platforms should provide mutually beneficial results as long as the flow of data and/or revenue associated with it is apportioned equitably. In Europe, Google's Digital News Initiative has sought to foster such collaborative efforts with news organisations. Now in its third year, it has so far offered over €70million to over 350 projects designed to support quality journalism.

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Trust in News

Interest in news may be on the rise while consumption is fragmented across multiple sources and platforms, but the nature of consumer relationships with news varies greatly by medium. Whatever the media channel, can audiences still expect, as a bare minimum, coverage of the news to be fair, balanced and accurate? Indeed, is trust even a driver of consumption for some news platforms?

Fast Facts

TRUST IN NEWS - A FUNDAMENTAL OF DEMOCRACY UNDER THREAT:

While nearly three quarters of news audiences believe that accuracy in journalism is key to a healthy democracy, only 56% trust that what they read is true and not fake most of the time.

TRUST IN MAINSTREAM NEWS BEATS ONLINE:

Printed news magazines are the most trusted news source (72% of consumers of this news media type rated them positively), closely followed by 24-hour TV news, television news bulletins and programmes, radio bulletins and national newspapers. Conversely, just 33% of those who consume news on social media agreed that it 'provides news I can trust'.

PROVIDING IN DEPTH COMMENTARY AND ANALYSIS IS A KEY DRIVER OF TRUST:

Providing in depth commentary and analysis is the key functional driver of trust in news. Print magazines, national newspapers and 24-hour news channels are rated best for providing in depth commentary and analysis.

News audiences have a range of expectations when it comes to content consumption choices. For some it is merely a matter of convenience or time of day, while for others it is about need states – being entertained, having views or perceptions challenged or being provided with in depth commentary and analysis. Trust remains a key differentiator throughout however.

For news organisations to position themselves as the trusted medium of choice, is to an extent to enable them to break free of the now much contested one-dimensional notion that ad spend should be a closely aligned function of time spent with media. Trust arguably transcends simple attention metrics (and as covered later in this report, is a potential differentiator for news organisations that can and should be monetized).

Trust in the News

1. Trust in News: A fundamental of democracy under threat

While nearly three-quarters of news audiences believe that accuracy in journalism is key to a healthy democracy, only 56% trust that what they read is true and not fake most of the time. Kantar Media's Target Group Index Latina data points to a similar trend in Brazil with a 21% decrease over the past decade in those who say that they trust what they read in the newspapers. External, partisan influence on the news is a very real concern with the majority of respondents worried that news media is failing to hold politicians and business leaders to account and only a minority believing that news media is truly independent most of the time.

Figure 2.1a: Attitudes towards news

73%
"The health of our democracy depends on journalists reporting the facts accurately"

61%
"I worry that the news media is failing to hold politicians and business figures accountable for their actions"

56%
"Most of the time, I trust that the news I'm seeing is true and not fake news"

31%
"The news media in my country is free from undue political or government influence most of the time"

Question: Thinking about news in general, do you agree or disagree with the following statements? Percentage shown refers to the net of 'Strongly agree' and 'Agree'. Base: News audience in all markets (n=8000)

Implications

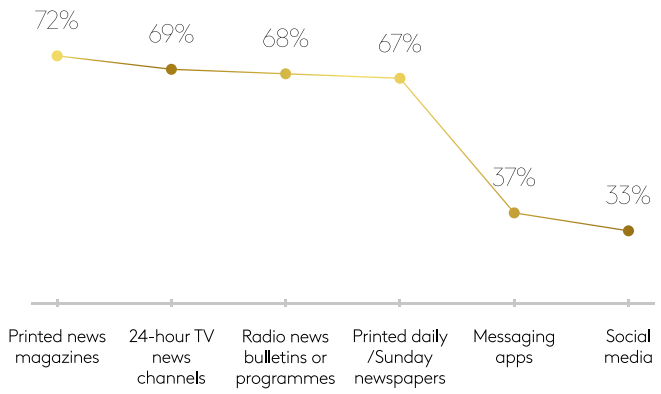
News is under more scrutiny than ever. For those news organisations that value high quality, accurate journalism and editorial integrity, and are confident that they are free from undue external pressures, audience growth and engagement strategies that focus on leveraging these attributes will be increasingly important.

For PR practitioners whose role is now so much about preventing the publication of misleading information, the halo effect that concerns about trust in news in general have on client communications must be carefully considered, along with the news platforms that will provide the credibility required to promote key client messages.

2. Trust in Mainstream News beats Online

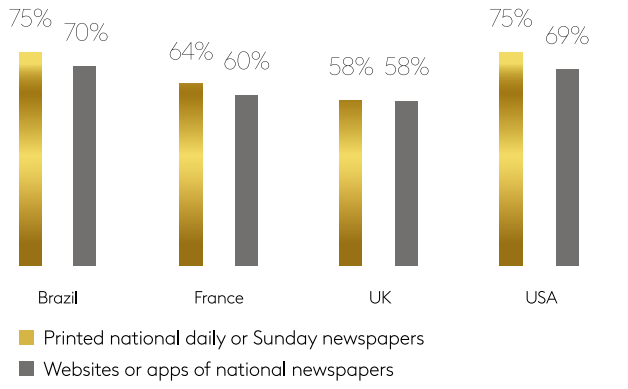
News audiences rate their trust in mainstream news, including print magazines and national newspapers, 24-hour TV news channels, television news bulletins and programmes and radio news bulletins, higher than their trust in social media and messaging apps at the other end of the spectrum. There is also a distinct print dynamic at play with news magazines proving to be the most trusted amongst their readers overall and national newspapers coming fourth in the ranking, alongside TV news bulletins.

Figure 2.2a: Trust in news sources used



Question: On a scale from 1-5, where 1 is poor and 5 is excellent, how good do you think each of the news sources that you use is at...Providing news I can trust? Percentage shown refers to top 2 box net scores. Base: all who have used each news source in all markets (n>1000 per news source)

Figure 2.2b: Trust in newspaper brands by country



Question: On a scale from 1-5, where 1 is poor and 5 is excellent, how good do you think each of the news sources that you use is at... Providing news I can trust? Percentage shown refers to top 2 box net scores. Base: News audience who have used printed daily or Sunday newspapers in the last week in individual markets (n>300 per market), news audience who have used websites or apps of newspapers in individual markets (n>400 per market).

By country the print vs digital trust dynamic tends to play out across the board, with one notable exception in the UK, where the print and digital properties of national newspaper brands are rated equally for trust by those who use them, but are rated lower than in the other three countries overall.

Implications

The reputation of news organisations which started life in the offline world and which now still have a brand presence beyond the virtual world clearly has enduring value for news audiences. The slightly schizophrenic nature of news consumption is evidenced by a shift towards online news, despite lower levels of trust in online media. The power of print to engage audiences, even as circulation and readerships decline, should not be overlooked and print news brands should look to promote the strength of their audience relationship to advertisers and commercial partners. Media and campaign measurement that gauges the influence of trusted media on ad effectiveness will aid marketers looking to unlock ROI for their clients.

For social media, appearing at the bottom of the trust ranking should be viewed as an opportunity. As later chapters in this report explore, the sharing of fake news on social media has impacted trust in digital platforms overall. Enhanced collaboration between platforms and quality news organisations will create mutually beneficial audience engagement opportunities for both.

3.Provision of in-depth commentary and analysis is a key driver of Trust

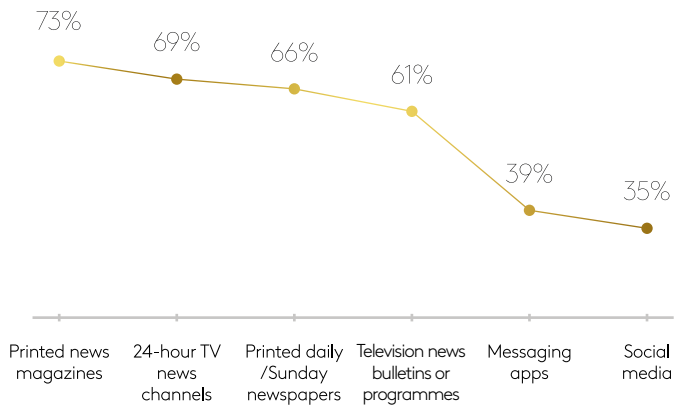
Understanding the drivers of trust is crucial for news organisations looking to build deeper audience relationships at a time when content consumption habits are so fragmented. The biggest functional driver of trust among the features of news media captured in this study is "provides in-depth commentary and analysis". It is consistently twice as important as the secondary drivers which have very similar levels of influence on trust overall.

The secondary drivers of trust are: "Challenging my views and opinions", "Being easy to understand", "Being first with breaking news" and "Giving me things to talk about or share."

"Being entertaining or amusing" consistently has the least influence on a news source being trusted. News audiences are far from dumbing down. They demand serious content and the provision of this type of content will help deepen the nature of consumer relationships with news organisations offline and online.

Providing in depth commentary and analysis is a key strength of mainstream news, in particular printed news magazines and national newspapers which come first and third in the rankings respectively.

Figure 2.3a: Rating of news sources used for providing in-depth commentary and analysis



Question: On a scale from 1-5, where 1 is poor and 5 is excellent, how good do you think each of the news sources that you use is at... Providing in-depth commentary and analysis? Percentage shown refers to top 2 box net scores. Base: all who have used each news source in all markets (n=1083+ per news source)

Implications

Trust in journalism may be a fundamental of democracy which is under threat, but the good news for news organisations is that there is a relatively clear and intuitive route to growing levels of audience trust. While some platforms and media are better than others at providing in depth commentary and analysis, the power of storytelling irrespective of medium is of key importance. In an age where online audiences are accused of having a deficit of attention and are snacking on soundbites and short form content, it is telling that it is in-depth content which is the route to building more trusting brand relationships.

News organisations must assess whether they are devoting the correct balance of resources to servicing in depth analysis versus breaking news and lifestyle content. The ability to provide engaging long form content is a key differentiator for print, and national newspaper brands and news magazines should look to their long established expertise in providing such content to deepen audience relationships. Digital platforms must consider whether they have suitable publishing tools for the consumption of long form content, while PR agencies should be open to providing in depth material about clients to content hungry news audiences.

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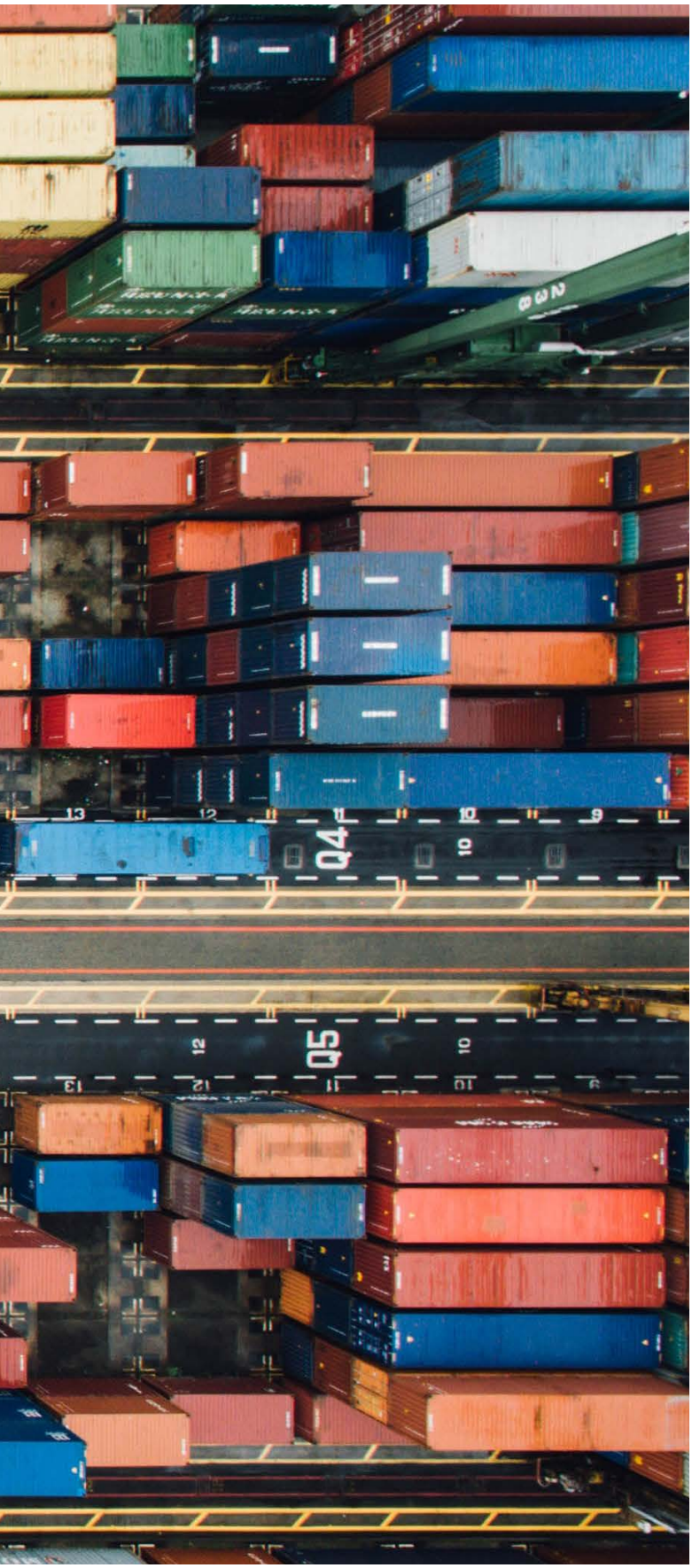


Distributing News

The evolution of national newspaper brand audiences is a well-documented journey that has seen a transition from print to desktop to mobile and off-platform content consumption. It is the latter which presents a dilemma for news organisations, fuelling the destination vs distribution decision making process as publishers seek to effectively model the revenue trade-offs between extending reach through social and news aggregators ("distribution"), or bringing audiences to news organisations' own websites and apps in an effort to gather more easily monetizable audience data ("destination").

Fast Facts

DISTRIBUTION vs DESTINATION STRATEGY REMAINS CRITICAL:

42% of news audiences visit news sites or apps directly, while discovery of content distributed through social media comes a close second at 36%. Nearly two thirds of social news consumers do notice which news organisation provides the content they are reading socially.

PARTICIPATION AND ACCESS DRIVE SOCIAL NEWS:

43% consume news socially to access a wide variety of news sources, while 40% do so to take in very different views to their own.

SHARING THE NEWS INDISCRIMINATELY IS A SIGNIFICANT HABIT:

While sharing stories is a key news activity on social media, 18% have shared a story after only reading the headline and not the content.

The impact of news consumed through social channels actually extends beyond the destination vs distribution debate. While social channels, fuelled by an apparently insatiable consumer demand to share pithy soundbites and news content with each other, have enabled many news organisations to grow reach, it is through these same channels that low-quality click-bait and fake news proliferated, damaging levels of trust overall.

Further challenges are presented by the ongoing "frenemy" status of the likes of Facebook and Google, without whom organic growth online would be virtually impossible, but from whom – as many claim - news organisations enjoy a disproportionately low share of the spoils of audience engagement.

Distributing News

1. Distribution Vs Destination strategy remains critical

While online news as a destination - i.e. people visiting a news website or app directly - is still the predominant mode of news discovery online, the presence of social is now mainstream. 42% of news audiences visit news sites or apps directly, while discovery through social media comes a close second at 36%. As might be expected, generational differences highlight where this growth is coming from, with 53% of 18-24 year-olds accessing news socially, vs. just 14% of 65+ year-olds.

Figure 3.1a: How news is accessed online

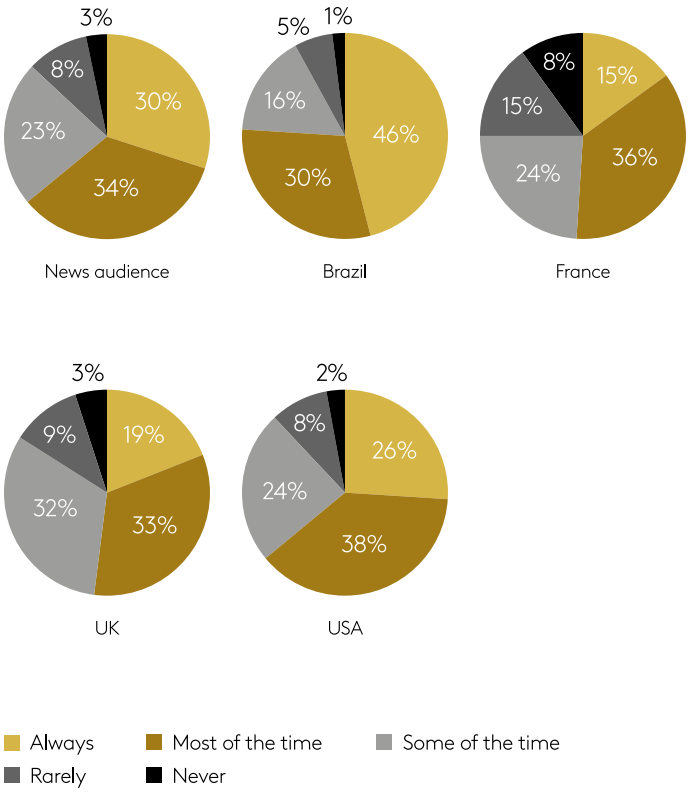
42%
Directly access one or more news websites or apps

36%
Use social media to discover news

Question: Thinking about how you got your news online on any device in the last week, which were the ways in which you found your news online? Base: News audience who have used a device connected to the internet to access news in the last week in individual markets (n=1730+ per market)

While the distribution of news socially benefits news organisations by allowing their content to proliferate to new and far reaching audiences globally, it is pertinent to question the extent to which news organisation brand recognition exists in the social sphere. Some degree of brand relationship (i.e. trust) has to be created through social distribution if audiences are to be successfully monetized, and, encouragingly for news organisations, the majority of respondents (64%) do tend to recognise the news organisation that created the story they are reading. A note of caution should be sounded for UK and French news organisations where this figure tends to be lower, hovering just over the 50% mark.

Figure 3.1b: How often it is noticed which news organisation supplies stories read on social media? (%)



Question: How often do you notice which news organisation has supplied the stories you read on social media? Base: News audience who have accessed news through social media in the last week in all markets (n=3550), News audience who have accessed news through social media in the last week in individual markets (n=611+ per market)

Figure 3.1c: Motivation for using social media to access news

30%
are motivated to access news socially as it's cheaper than paying for content

Question: Why do you use social media to access, share or participate in news coverage? Base: News audience who have accessed news through social media in the last week in all markets (n=3550)

Although it is only a minority of news audiences are motivated to access news socially purely for cost reasons, a significant proportion (30%) do feel that accessing news socially is cheaper than paying for content.

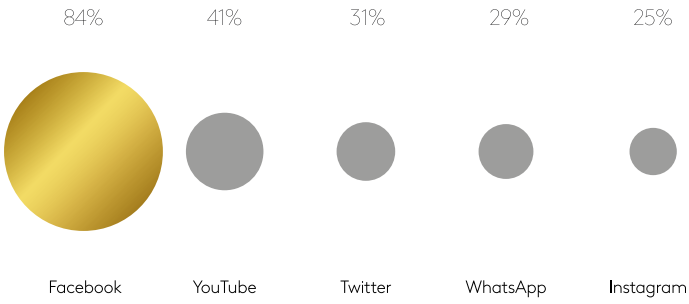
Implications

For many news organisations, careful consideration has to be given to the balance between the two strategies. Not every brand can be a Buzzfeed – fully embracing a distribution and reach strategy through social channels - yet not every brand has the salience to close itself off behind a walled garden. Considered financial modelling of the content distribution, audience monetization and ad revenue implications must be undertaken to strike the right balance. If the decision is taken to funnel audiences from social channels to a news brand's own digital properties, then clearly the concerns of those who feel that they were getting a better experience on social must be addressed too. News organisations must weigh up the benefits of extending reach off platform against the monetization opportunities of bringing audiences on platform through advertising and subscriptions.

2. Participation and access drive social news

Facebook dominates as the social platform of choice for discovering news across the four countries, with 84% of news audiences who access news via social media using the platform in this way. Acutely aware of the symbiotic dependency of platform and news organisation (one as the distributor of content and one as the creator) Facebook has sought to leverage its audience's relationship with news through the development of Instant Articles (quick loading news articles designed for mobile that contain publisher branding, stay within the Facebook walled garden and in to which ads can be served and revenue shared with news organisations). The development of further publishing tools that benefit both news organisation and digital platform seem inevitable.

Figure 3.2a: Top five social platforms used to access news in the past week



Question: Which of the following have you used for news in the past week? Base: News audience who have accessed news through social media in the last week in all markets (n=3550)

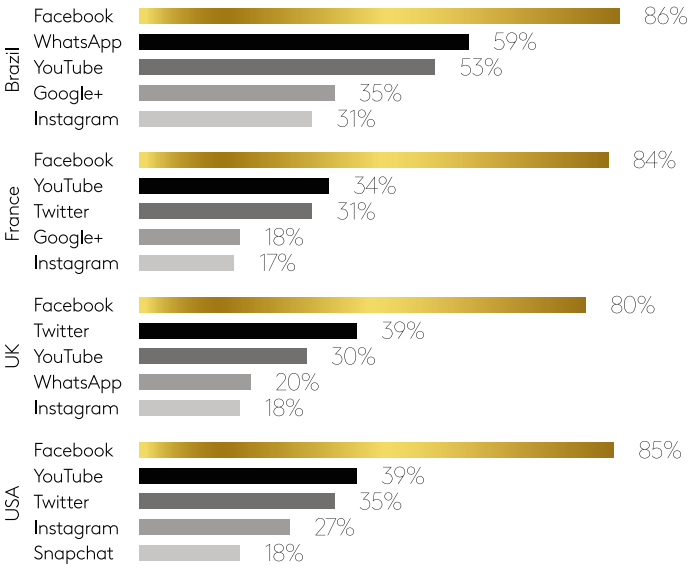
Figure 3.2b: Top three types of account or social media page followed on social media

Question: When using social media like Facebook, Google+, YouTube or Twitter, have you followed any of the below? Base: News audience who have accessed news through social media in the last week in all markets (n=3550)

WhatsApp is second only to Facebook as a source of social news in Brazil.

The rise of WhatsApp as a source of news should be of keen interest to news organisations looking to capitalise on the surging numbers of messaging app users globally. This trend is particularly noteworthy in Brazil, where a massive 59% of respondents claim to discover news in this way. The prominence of YouTube in all countries points to an appetite for video content among news audiences (covered later in this report); while the presence of Snapchat in the UK and US rankings has shown that social news is not just the preserve or more mainstream social platforms. 18-34 year old's are particularly engaging with news on Snapchat – a key consideration for those news organisations not currently publishing content via Snapchat Discover.

Figure 3.2c: Top five social platforms used to access news in the past week by country



Question: Which of the following have you used for news in the past week? Base: News audience who have accessed news through social media in the last week in individual markets (n=611+ per market)

Distributing News

The increasingly voracious appetite that people have for news as highlighted earlier, is further evidenced in their motivations for social platform usage. Accessing a wide variety of sources is seen as the primary motivator, although the ability to comment and share is also key. News audiences in 2017 are participatory in nature, while reading content on the go is a key driver of social news discovery.

Despite the fact that the consumption and sharing of news socially is seen by many to have to compounded the online echo chamber (and is cited as one of the reasons so many were surprised at the result of the UK's Brexit referendum and US elections), 40% of respondents claim that they use social media to see what people with views different to their own are saying. With a large proportion of news audiences actively trying to take on board multiple news sources and opinions, the echo chamber effect may not be as simple as once thought.

Figure 3.2d: Top reasons for using social media to consume news

43% I can easily access a wide variety of news sources

40% I can comment and share news with others

40% I can see what people with very different views from mine are saying

35% I can read the news on the go

Question: Why do you use social media to access, share or participate in news coverage? Base: News audience who have accessed news through social media in the last week in all markets (n=3550)

Implications

Social news audiences seek out multiple news sources and different views from their own. News organisations must consider what content they are distributing socially and how it should be packaged to fulfil these specific need states, while measuring its reach and impact holistically alongside other channels and platforms. Storytelling formats and techniques that both engage and provide alternative and balanced commentary are key. PR agencies must take the same set of considerations into account when promoting client messages, and, while the social news consumer will be more likely to share such messages if they resonate, they will also place corporate communications under greater scrutiny as they seek alternative views to their own.

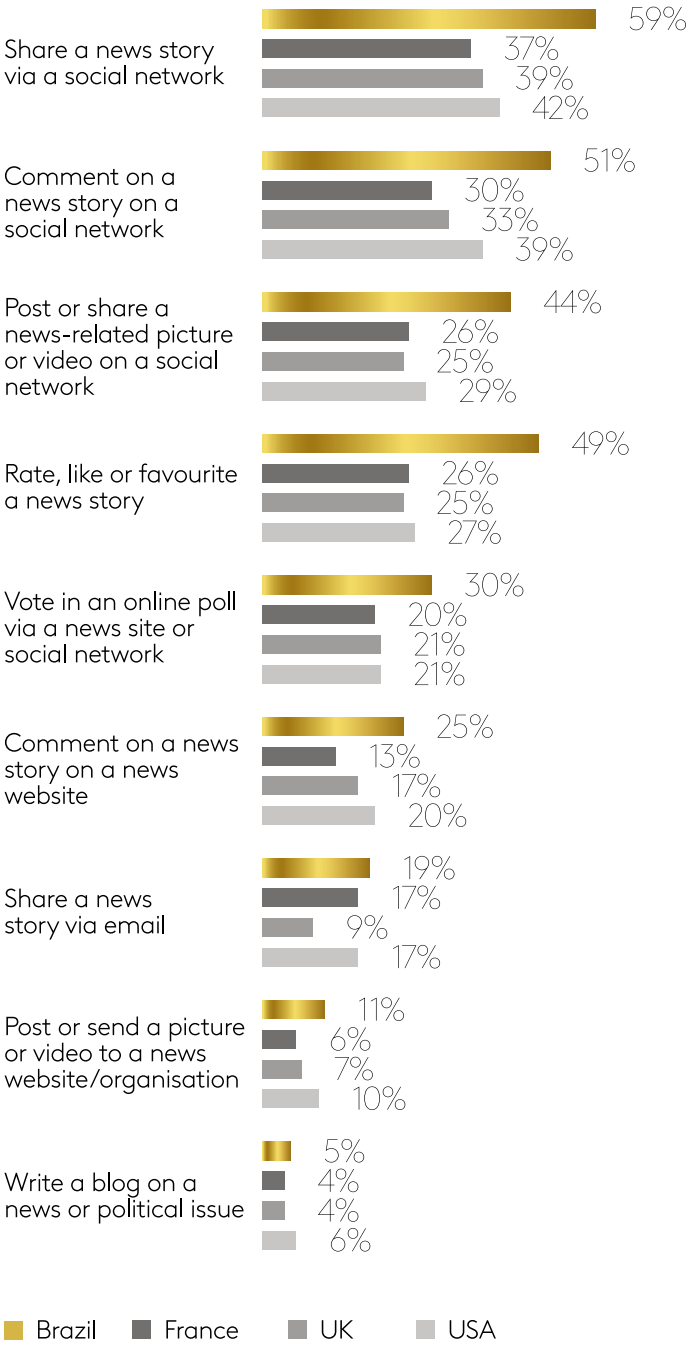
For digital platforms it will be increasingly important to collaborate with news organisations to identify the optimal means of distributing content, while measuring its effectiveness.

3. Sharing news stories is a key news habit on social media, although many do so indiscriminately

Participation with news socially takes many forms. Sharing with others is a key, but many news audiences also comment, rate, like and vote in online polls. News audiences in Brazil are particularly active in this regard, with the US, UK and France much more similar across the board. Social news audiences demand interactivity from their news content, and it is notable that sharing and commenting are the most prominent ways in which they engage with news.

It is this thirst for sharing content with others that drives the organic growth of news organisations' brand presence on social, while the desire to comment is reflective of the two-way relationship that news audiences now demand with journalists – an open relationship that extends far beyond the one-way delivery of content from news organisation to audience without scope for feedback.

Figure 3.3a: Engagement with news content via social media



Question: In which of these ways do you share or participate in news coverage in an average week? Base: News audience who have accessed news through social media in the last week in individual markets (n>600)

Is the social sharing of news a considered action however? Whether it is real news or fake news, criticism is often levelled at common metrics of success such as social shares and likes that pay no attention to whether content is actually read of engaged with.

Figure 3.3b

18%

have shared a story after only reading the headline and none of the content

Question: Have you ever shared a news story online after reading only the headline and none of the content? Base: News audience who have accessed news through social media in the last week in all markets (n=3550)

Although the vast majority have not shared a story indiscriminately, regionally there is some variation, with 20% of US and Brazilian respondents claiming to have done so versus 15% of UK and 13% of French news audiences. It only takes a small minority of sharers for content to proliferate, contributing, for example, to the spread of fake news covered later in this report.

Implications

The social news consumer is participative in nature and digital platforms will keep innovating to ensure that users are provided with the functionality to engage with and share news content in new and interesting ways. While the optimisation of news headlines is a mainstream practice for those digitally-savvy news organisations who have invested in editorial analytics systems, there is a fine line between creating sensational headlines that might encourage indiscriminate sharing and those that elicit genuine reader curiosity. Either way, data-driven content distribution and the upskilling of editorial data specialists will fuel this trend in 2017 and beyond whether content is actually read or engaged with.


中国人民銀行
100
壹佰圓
FEDERAL RESERVE
THE UNITED STATES
IS LEGAL TENDER
£10
Bank of
I PROMISE TO PAY THE BEARER
CK50 137917
London

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Monetizing News

Where news audience eyeballs go, the monetization models follow. Although the transition of audiences from print to desktop to mobile has seen the average revenue per user (through advertising and subscriptions) drop from being traded in pounds to pennies, the trust that news audiences have in quality credible content presents significant opportunities for news.

Fast Facts

THE FINANCIAL PREDICAMENT OF NEWS ORGANISATIONS IS A REAL CONCERN FOR MANY:

44% are concerned that some news organisations may go out of business, meaning less choice for them. This rises to over half (52%) of 18-34 year-olds.

THE ANSWER? LOOK TO YOUNGER AUDIENCES:

42% of 18-34 year-olds paid for online news content in any form in the past year, almost double the proportion of those aged 35+ (22%). Younger audiences are in general more sympathetic to the idea, and twice as likely to feel a sense of duty to support independent journalism.

TRUST INCREASES PROPENSITY TO PAY FOR NEWS:

Among those who trust newspaper brands, for example, 26% pay for an ongoing subscription to an online news service (from any source), compared with 17% of news audiences overall.

The majority of news organisations still face significant financial pressures as growth in digital ad revenues fails to make up for the shortfall in print circulation, while brands like the Wall Street Journal have discovered that they can no longer rely on overseas audiences to prop up print readership levels. Increased competition in the online advertising ecosystem, combined with the rise of programmatic selling practices, has necessitated a different approach to monetizing online news audiences.

A hybrid approach that focuses not only on ad revenue, but also on more participatory forms of audience monetization - including premium subscriptions, membership, and one-off donations - have all found their place in the news landscape. What has our study told us about how much more valuable those audiences who highly trust news organisations are in this hybrid world?

Monetizing News

1. The financial predicament of news organisations is a real concern for many

While we've seen that the majority of news audiences believe that trusted, accurate journalism is vital for a healthy democracy, there is a more immediate and personal motivation behind audience concerns relating to the financial performance of news organisations. Again it relates to choice. In a world where people are using more news sources than they were a year ago, over half are concerned that news organisations going out of business will curtail their consumer choice. To that extent, there is an awareness of the challenges news organisations face among their readers, viewers and users.

Figure 4.1a: Concerns surrounding news

"I am concerned that some news organisations may go out of business, meaning less choice for me"

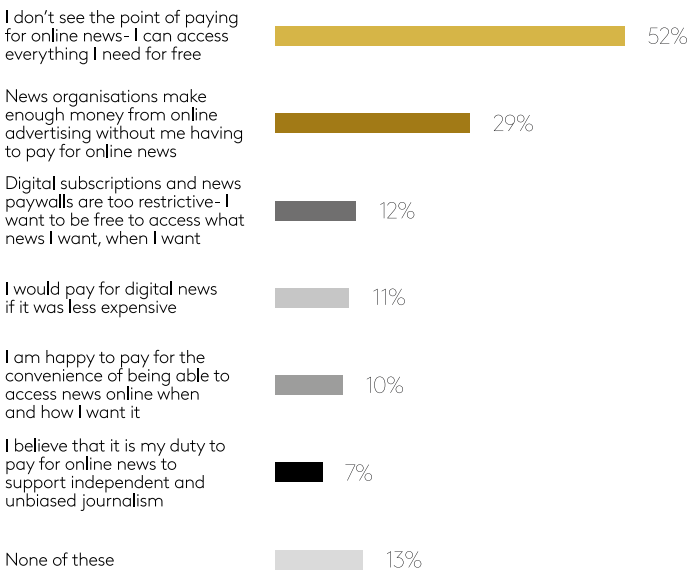
44%
of the news audience and 52% of 18-34 year-olds agree

52%
of 18-34 year-olds agree

Question: Thinking about news in general, do you agree or disagree with the following statements? Percentage shown refers to the net of 'Strongly agree' and 'Agree'. Base: News audience in all markets (n=8000), news audience aged 18-34 in all markets (n=2700).

This question of choice spans generations with younger and older audiences agreeing with this statement at similar levels. At the same time, however, this awareness of news organisations' financial challenges, still struggles to fully translate into awareness of the trade-off required to access quality news online for free.

Figure 4.1b: Attitudes surrounding paying for news content online



Question: Which of the following statements apply to you? Base: News audience in all markets (n=8000)

Over half of news audiences claim that they don't see the point in paying for online news as they can access everything they need for free. The alternative of course is accessing online news for free on the understanding that your presence on site will be monetised through advertising. 29% of respondents however believe news organisation make enough from online advertising to justify not paying for content.

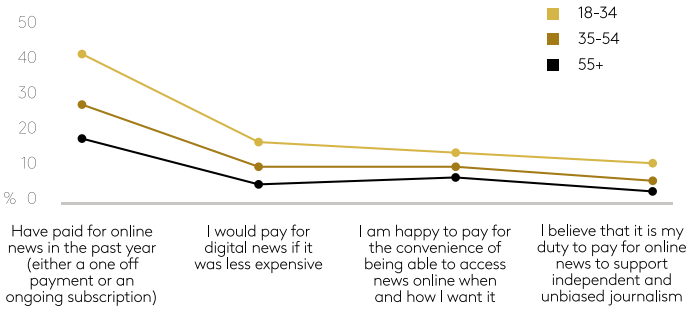
Implications

The hard reality for news organisations is that competition for ad dollars in the online world is only getting fiercer. Clearly this insight does not permeate beyond the media community however, with a significant proportion of news audiences struggling to reconcile the sheer number of ads that they are exposed to on news websites with a story of stagnating digital ad revenue. Clear consumer messaging focused on educating audiences is key. This challenge is not just the sole responsibility of news organisations themselves. Those players in the online ecosystem – such us digital platforms and social media – who are also dependent on freely available news content for their users to read and engage with, must also look to promote consumer understanding in this area.

2. The answer? Look to under 35's

Younger audiences present a significant opportunity for news organisations in terms of monetization strategy, and inevitably will be turned to as news organisations look to future proof consumption of their content. 18-34 year-olds are more likely than older age groups to believe that they have a duty to pay for online content and to be happy to pay for the convenience of readily accessible news than older audiences. While this could partly be because they are less likely to pay for print content, they also represent a generation of digital natives for whom paying for online services like Spotify, Netflix or Dropbox is a commonplace activity. With 17% responding that they would pay for news consumed online if it was less expensive, careful consideration must clearly be given to price points and value propositions to what is clearly a receptive audience for monetization.

Figure 4.2a: Attitudes towards paying for news



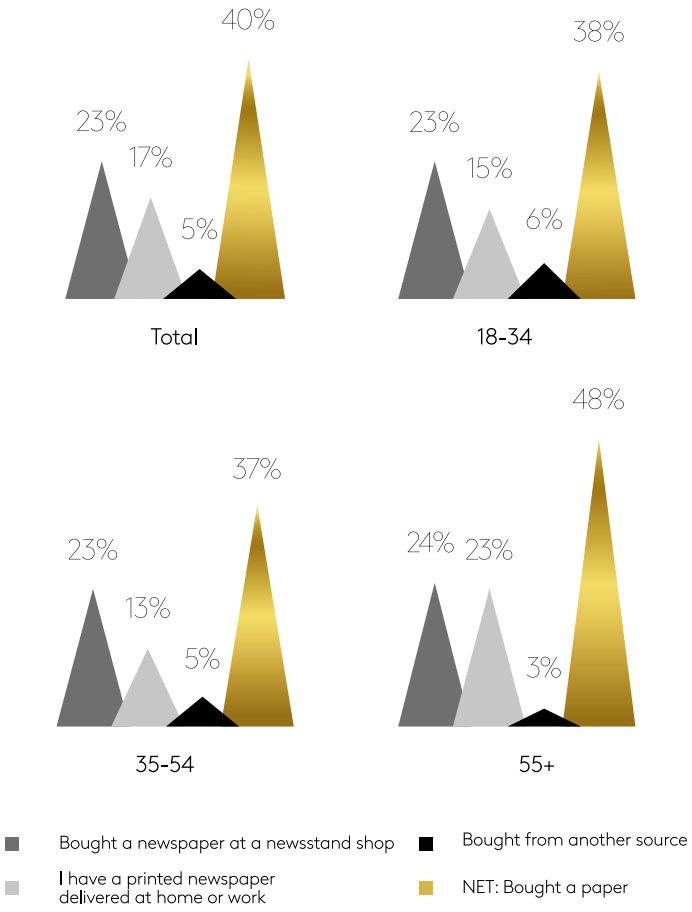
Question: Which of the following statements apply to you? Base: News audience aged 18-34 in all markets (n=2700), news audience aged 35-54 in all markets (n=2980), news audience aged 55+ in all markets (n=2320)

It should be noted that a print vs. digital dynamic is at play here. With 55+ year-olds ten percentage points more likely than 18-34 year-olds to have bought a print newspaper in the past week, it is entirely possible that their reticence to pay for content online is because they feel that they are already paying for it offline.

Although print circulations are on the decline, for many newspaper brands, print is the platform that contributes the lion's share of revenue. For mainstream newspaper brands, print is the basis on which many have created a brand relationship.

It is imperative that newspapers extend reach beyond this platform while at the same time nurture audience relationships that are not as strong online has they have traditionally been in print. Across the sample, subscription to a service that delivers newspapers to work or home is a path to newspaper purchase far more likely to be employed by older audiences, whereas likelihood to have purchased from a news stand or shop is fairly consistent across the board.

Figure 4.2b: Printed newspaper purchasing in the last week



Question: Have you bought or paid for a printed newspaper in the last week? Base: News audience in all markets (n=8000), news audience aged 18-34 in all markets (n=2700), news audience aged 35-54 in all markets (n=2980), news audience aged 55+ in all markets (n=2320)

Implications

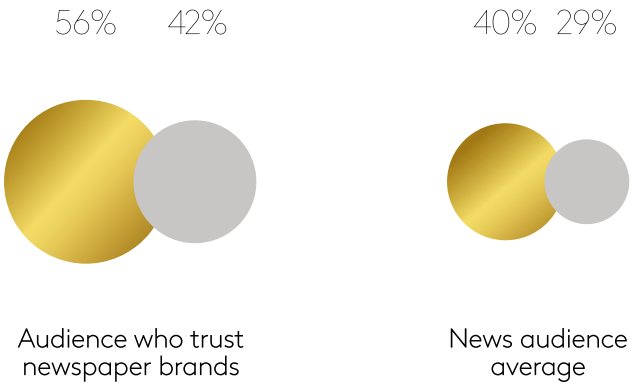
Younger audiences are attitudinally switched on to paying for online news and the least likely to pay for news in print. A differentiated product offering for younger audiences with an enhanced value proposition is no easy task, but clearly is a question that needs to be answered through focused product development, brand tracking and marketing effectiveness measurement.

Monetizing News

3. Trust increases propensity to pay for News

While purchase of the print newspaper remains the predominant method of paying for news, 16% of news audiences have made a one-off payment online - either in the form of paying for an article or one-off access, or even in the form of a one off donation. In terms of paying for an ongoing subscription, the figure is around the same at 17%.

Figure 4.3a: Paying for news in print and online

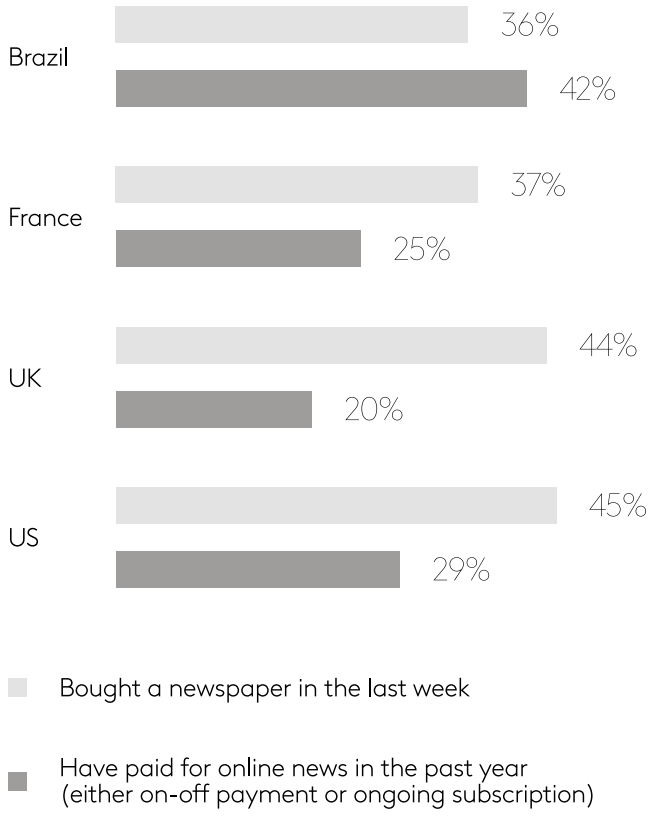


- Bought a newspaper in the last week
- Have paid for online news in the past year (either one-off payment or ongoing subscription)

Question: Have you bought or paid for a printed newspaper in the last week?/ Which of the following ways have you paid for online news content in the last year? Base: News audience in all markets (n=8000), news audience who trust newspaper brands in all markets (n=2425)

While UK news audiences are among the most likely to pay for print, they are the least likely to have done so online, unlike their Brazilian counterparts. UK and French news audiences are more likely to have made a one off payment for online news as opposed to an ongoing subscription, while the reverse is true in Brazil and the US.

Figure 4.3b: Propensity to pay for news by country



Question: Have you bought or paid for a printed newspaper in the last week?/ Which of the following ways have you paid for online news content in the last year? Base: News audience in individual markets (n=2000 per market)

While the focus of many mainstream news organisations is one of converting and growing online news subscriptions, the power of one off payments should not be overlooked. Micropayment platforms (where people pay a tiny amount for access to one off articles of their choosing) have been enabled by tech platforms like Blendle, Tipsy and Flattr, while, in terms of donations, the Guardian has adopted an almost Wikipedia-like approach to encouraging consumers to contribute to the brand financially as and when they please.

The relationship between trust and monetization also extends beyond audience subscriptions and donations, to advertising impact. 2017 Kantar Media data from TGI Clickstream suggests that those who trust newspaper brands are 65% more likely than the average British adult to agree that they pay more attention to advertising on sites that they trust. The battle of attention in the online ad market is fierce and the ability to prove a tangible ad impact multiplier to brands looking to maximise the efficiency of every penny of online ad spend will become an increasingly important unique selling point for mainstream news organisations.

Implications

While news audiences have an increasingly insatiable appetite for news, and broad macro concerns about what the demise of news organisations might mean for their freedom of choice, clearly more must be done to help them understand the financial trade-offs in providing news online.

Advertising in all its forms will remain an important revenue stream for news organisations, but to make up the shortfall in print revenues, further hybrid payment models must be explored. It is clear that a strategy of pursuing these models while building brand trust will have a potential multiplier effect on commercial effectiveness, from the point of view of both ad receptivity/engagement and propensity to pay for content.

Ad measurement, verification and tracking all become more crucial in a world where the trust multiplier effect not only needs to be proven on a campaign by campaign basis, but also needs to be factored into programmatic algorithms to ensure that quality news content inventory is being valued correctly.

KANTAR

Fake News

The term "fake news" is very much a phenomenon of 2016/17; it's usage in mainstream news taking off around the time of the US presidential election in November and peaking in February 2017 during President Trump's first days in office. Media monitoring data sourced from Kantar Media has found that "fake news" has been used over 14,600 times by sixty mainstream news organisations in the UK, France, US and Brazil between November 2016 and May 2017, and our research has shown that it has left an indelible imprint on the trust that people place in news organisations and platforms.

Fast Facts

TRUST IN MAINSTREAM NEWS HAS SUFFERED LESS THAN DIGITAL SPECIALISTS IN THE WAKE OF FAKE NEWS:

24% say that they will trust coverage of politics and elections less in mainstream news as a result of becoming aware of fake news (18% will trust it more, and 59% the same as before). For social media the figures are starker: 58% will trust it less in the wake of fake news.

NO CONSENSUS ON THE DEFINITION OF FAKE NEWS:

58% of news audiences believe that fake news is a story that has been deliberately fabricated by a mainstream news organisation, while only 42% believe it to be story that has been put out by someone pretending to be a news organization.

US AND BRAZIL MOST LIKELY TO BELIEVE FAKE NEWS HAS INFLUENCED OUTCOME OF THEIR OWN ELECTIONS:

The majority of US and Brazilian news audiences believe that fake news has impacted the results of elections in their own countries, while those in the UK and France feel that it has had more impact outside their own countries.

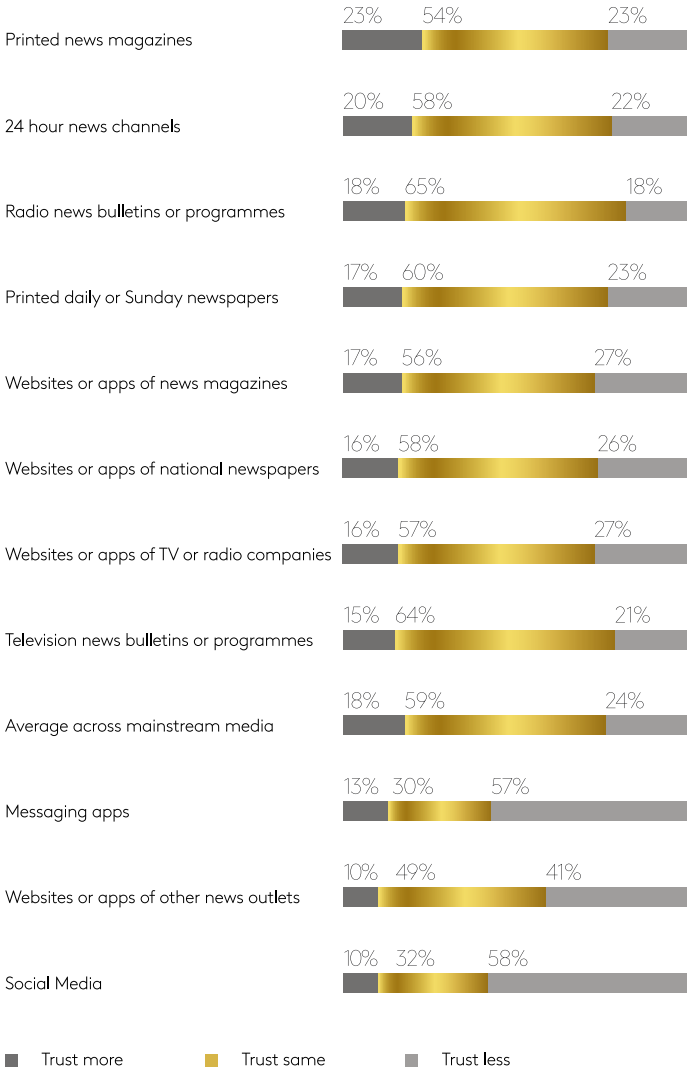
Fake News

1. Trust in Mainstream News has suffered less than digital specialists in the wake of fake news

When it comes to trust in election and politics news it is digital media which is really losing out in terms of the impact of fake news on trust levels. Social media (which 58% claim to trust less as a result of fake news) and messaging apps (57% trust less) are taking the brunt of negative consumer sentiment when it comes to trust, and it is no coincidence that it is these channels that the creators of fake news rely on to spread their fabricated content. Traditional offline media has fared much better however, with radio, printed news magazines and 24 hour news channels suffering negligible, if any declines in trust.

Websites and apps of "other" news outlets – i.e. online only news organisations - have also suffered with 41 % claiming to trust their elections and politics coverage less. At the other end of the spectrum the trusted status of mainstream news highlighted earlier in this report is clearly playing out in this dynamic with mainstream news organisations having a far greater reserve of positive consumer trust on which to draw.

Figure 5.1a: The impact of hearing about 'fake news' on trust in politics and election coverage on platforms used



Question: As a result of hearing about 'fake news', will you trust news coverage of politics and elections on the following platforms more, less or the same? Base: News audience that have used each news source and have heard of 'fake news' in all markets (n=951+ per news source)

Implications

While mainstream news organisations might be experiencing fallout from consumer perceptions of fake news, it is clear when drilling into the results that the platforms that fake news is shared on fare much worse. Mainstream news must use this opportunity to capitalize on its editorial integrity and trusted status to grow audience reach and engagement. Collaborative initiatives such as CrossCheck in France, which debunked sixty false stories in the run up to the French election, will help foster levels of consumer trust and in the future will become standard practice.

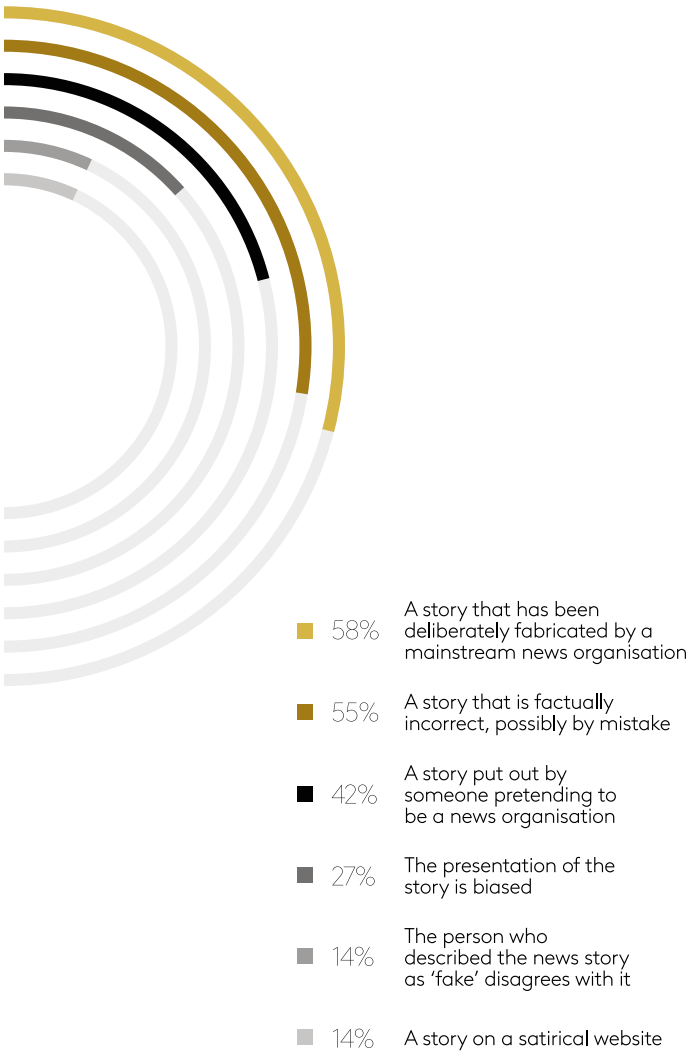
For social platforms and the digital news organisations that rely on them for distribution (such as Buzzfeed or Upworthy), there is a challenge in creating a separation in consumers' minds between the content and the platform that it's delivered on. New tools to combat the spread of fake news will increasingly enable news audiences to make this distinction and ensure that social media takes less of the brunt of negative consumer sentiment.

PR agencies must consider the scrutiny that will be placed on client communications in the wake of fake news. Their role and reputation in creating authentic client communications will be of paramount importance going forward – more so than ever before.

2. No consensus on the definition of fake news

Tellingly, the majority of news audiences believe that fake news is a story that has been deliberately fabricated by mainstream news, while only 42% believe it to be story that has been put out by someone pretending to be a news organization. With the advent of fake news organisations like the Denver Guardian, World News Daily Report and YourNewsWire.com capitalising on subconscious brand associations that news audiences make between certain words and mainstream news organisations (e.g. "daily" and "guardian") the origin of fake news is less than clear for many.

Figure 5.2a: What does 'fake news' mean to you?



Question: When you hear a news item or story described as 'fake news', what does that mean to you? Base: News audience who have heard of 'fake news' in all markets (n=6678)

Fake News

Fake news is not just impacting consumer trust. It also impacts news audiences' sensitivity to fact checking and self-selection when it comes to reading and sharing news content. News audiences are personally empowered to combat fake news and since hearing about it 70% have reconsidered sharing an article online before doing so, while over three quarters have conducted their own fact checking elsewhere.

Figure 5.2b: Actions taken by those who have heard of 'fake news'

15%
shared a story online after reading headline and not the content

70%
have reconsidered sharing an article online after hearing about Fake News

76%
checked elsewhere to verify claims in a story

Question: Have you ever questioned the facts in a news story you have seen and looked to check or verify these facts elsewhere?/Do you think twice about sharing news stories online without reading them first since you heard of 'fake news'?/Have you ever shared a news story online after reading only the headline and none of the content? Base: News audience who have heard of 'fake news' in all markets (n=6678)

Implications

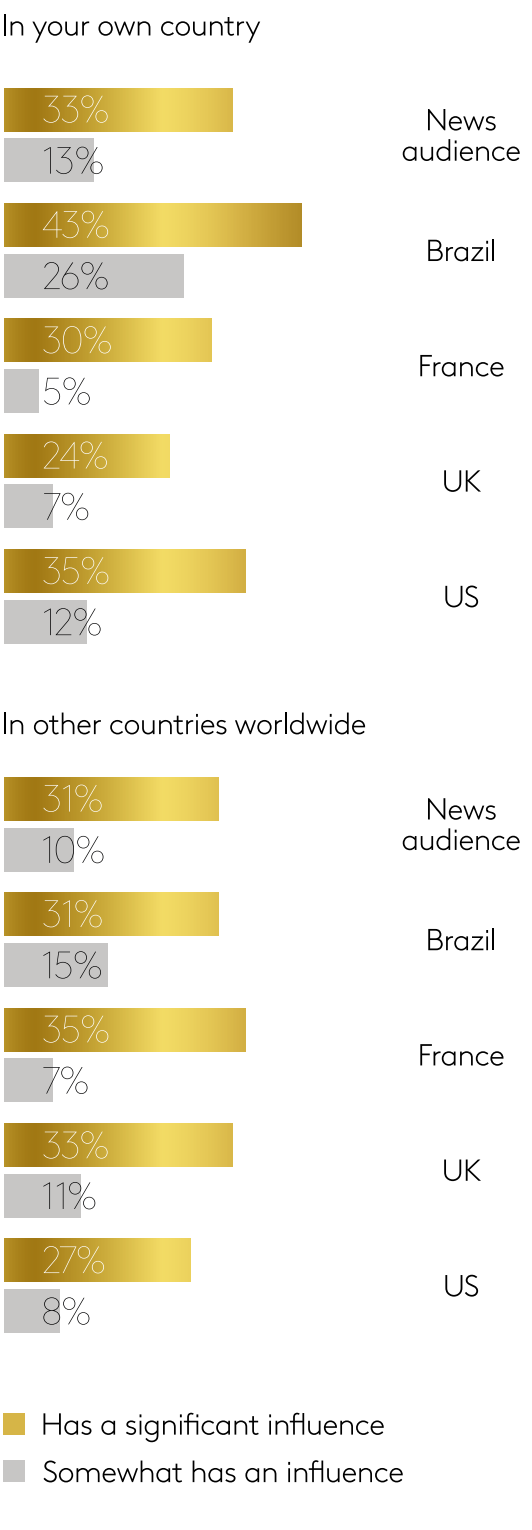
Whether a news organisation or a digital platform, clear messaging is required to help news audiences understand the origins of fake news. Many news audiences are now self-regulating the sharing of suspected fake news stories, and giving people the tools to conduct their own fact checking would resonate well. PR practitioners should be aware that audiences will likely apply this same level of scrutiny to their own content.

3.US & Brazil most likely to believe fake news has influenced the outcome of their own elections

Although a significant proportion in each region believes that fake news has had an impact on recent elections, there is a clear Europe vs. Americas divide in the extent of this impact. The majority of US and Brazilian news audiences believe that fake news has impacted elections in their own countries, while those in the UK and France are more likely to believe that it has had an impact outside their own country.

The term "Fake News" has been used by the US president so frequently (and in fact Kantar media monitoring data shows that it's usage peaked in the US and UK during Trump's first days in office) that it comes as no surprise that US news audiences are more aware of its impact. In Brazil however, although a national election has not been held since 2014, a series of corruption scandals have likely raised news audience sensitivity to political news.

Figure 5.3a: Perceived extent to which 'fake news' has influenced the outcome of elections



Question: To what extent do you believe that fake news is influencing the outcome of elections... a) in your own country? b) in other countries worldwide? Base: News audience who have heard of 'fake news' in all markets (n=6678), news audience who have heard of 'fake news' in individual markets (n>1400)

Implications

Fake news not only impacts perceptions of news organisations – news audiences believe it has a real-world impact on the politics that shape their lives. News organisations have a role to play in providing the content that will give people the reassurance required to grow trust levels. At the same time news organisations can have a profound societal influence with their content which, in turn, brands can benefit from through a halo effect as they seek to build their own commercial influence through advertising activity. The two are inextricably linked and news should continue to be confident in asserting its value to brands in this regard.

KANTAR

The Future of News

The media consumption habits of news audiences are unrecognizable from ten years ago, and no doubt in ten years' time will be more different still. Trust is, however, likely to be a timeless, transcending factor that differentiates news organisations irrespective of platform and device. It is this enduring relationship that publishers must seek to incubate while tackling threats like fake news and finding new and engaging methods of bringing content to news audiences.

Fast Facts

CREDIBLE SOURCES, REGULATION AND TECH TO SIFT THE FAKE FROM THE TRUE:

44% believe that news audiences choosing to access more credible news content is the most effective way to tackle fake news.

APPETITE FOR PERSONALISED CONTENT AMONG YOUNGER AUDIENCES:

53% of 18-34 year-olds want news content personalized based on what they have previously read.

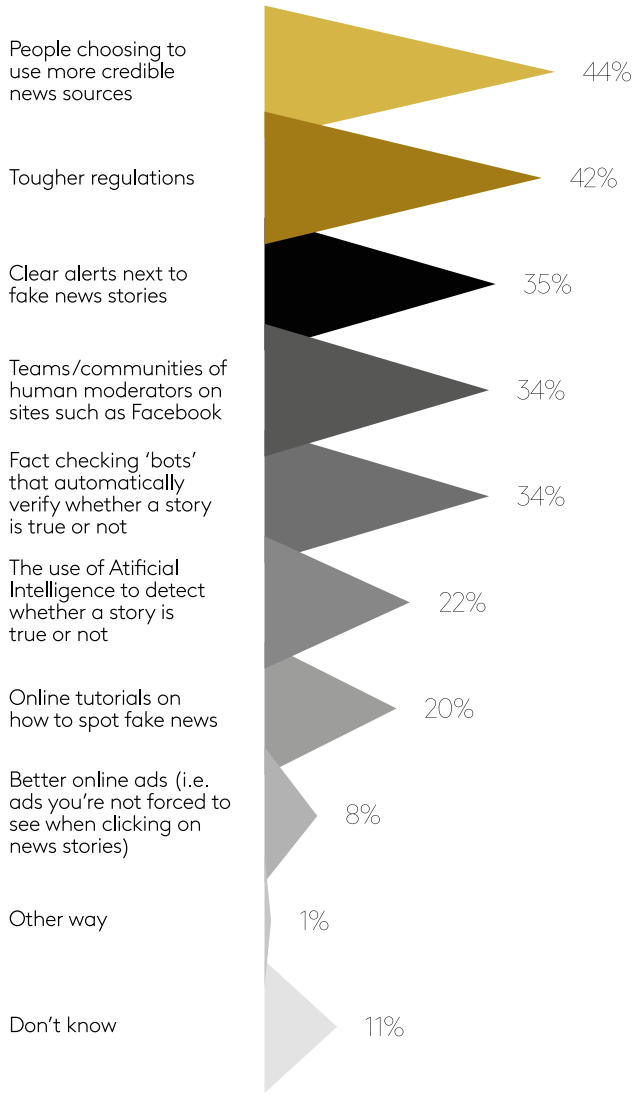
LIVE AND EXCLUSIVE: THE FUTURE OF NEWS VIDEO AND TV ONLINE:

63% watch online news video to access exclusive content that they can't see on TV.

1. Credible sources, regulation and tech to sift the fake from the true

News audiences believe that the onus is on individuals to tackle fake news, through their own choice and actions. Specifically this choice relates to opting to consume news from more credible sources. Helping audiences make the right choice is where technology comes in, with 35% believing that alerts next to news stories – like those pioneered by the Washington Post around the time of the US election - are an effective method of dealing with fake news. These alerts can be generated by automated fact checking bots or teams of human moderators, both of which are rated as being equally effective by news audiences. Tech is not the only answer however, with 42% opting for tougher regulations as a means of tackling fake news.

Figure 6.1a: Methods perceived as effective ways to tackle 'fake news'



Question: Which of the following do you believe are effective ways to tackle 'fake news'? Base: News audience who have heard of 'fake news' in all markets (n=6678)

Google and Facebook have both introduced steps this year to tackle fake news. Ranging from user tools to report fake news, to algorithms which better detect and sign-post deliberately misleading articles, these steps have been applauded in some corners while their effectiveness has been questioned in others (and in some cases have had the reverse of the intended effect with users deliberately sharing fake news stories once flagged). While these measures have been noticed by some people, regionally responses vary greatly with 13% of UK news audiences claiming to have seen them vs a third of Brazilians (compared to 16% in France and 22% in the US).

While some news organisations and platforms look to develop tools to identify and stem the flow of fake news, others have seen the crisis as an opportunity to develop an entirely new content proposition for news audiences. WikiTribune, for example, was launched in 2017 with the aim of pairing professional journalists with a community of volunteer contributors in a direct effort to combat the proliferation of factually incorrect content. While less than 10% of news audiences have heard of the platform, the 67% of them who say that they are likely to use it should give encouragement to the exploration of new news models.

9%

have heard of WikiTribune and 67% of them are likely to use it

Question: Have you heard of WikiTribune? / How likely do you think you will be to use this service? Base: News audience who have heard of 'fake news' in all markets (n=6678) / News audience who have heard of 'fake news' and 'WikiTribune' (n=621)

Implications

While regulation and fact checking technology might provide part of the answer, fake news also presents a tremendous opportunity for mainstream news organisations to assert the quality and the credibility of their journalism. The news industry cannot simply rely on digital platforms to tackle the problem, but rather they must appeal to consumer demand and rationality in helping them to unpick fact from fiction. With that in mind, however, the current and continuing efforts being made by the digital platforms to combat fake news should resonate with news audiences in terms of improved trust scores in future.

2. The growing Personalisation agenda driven by younger audiences

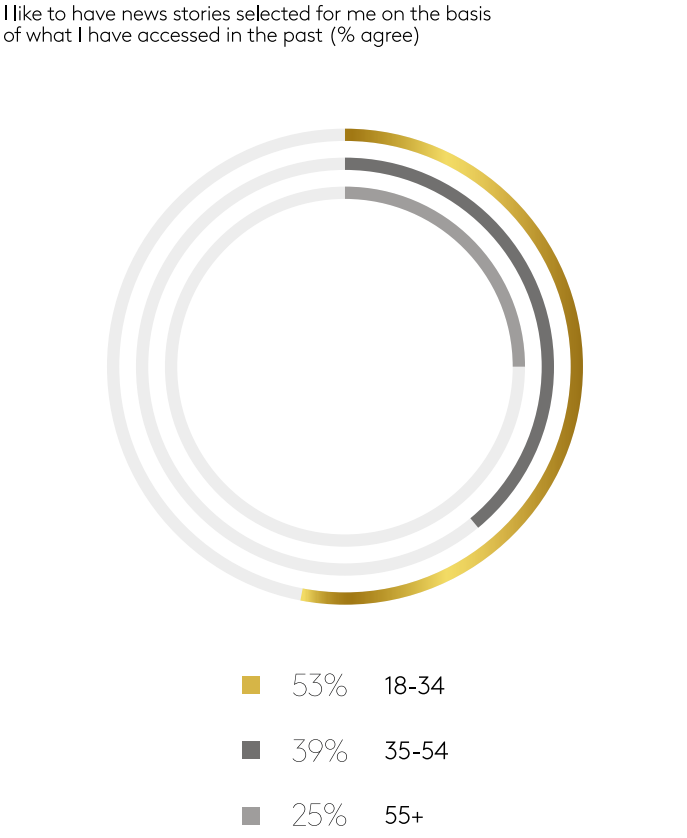
Personalised news content, whether selected by humans or algorithms is an ongoing source of debate in the industry. While the personalization of your own news feed can lead to higher levels of engagement, it's important that news organisations do not forget the serendipitous nature of the news browsing experience alongside their role as news curators. It is for this reason that nearly two thirds of news audiences worry that personalization may mean that they miss out on certain stories or perspectives (pointing towards a desire to burst the filter bubble). The majority are also concerned about the privacy aspect of personalization, as inevitably any customization of one's news feed involves consenting to share user data with publishers or platforms.

Figure 6.2a: Attitudes surrounding personalised news content

Question: Thinking about news in general, do you agree or disagree with the following statements? Percentage shown refers to the net of 'Strongly agree' and 'Agree' Base: News audience who have accessed news through an online platform in the last week in all markets (n=6247)

News audiences are more likely to want to have content personalized based on what they have accessed in the past than what has been read by their friends and this is overwhelmingly an attitude of the young. Over half of 18-34 year-olds want personalized content selected in this way versus just a quarter of 55+ year-olds.

Figure 6.2b



Question: Thinking about news in general, do you agree or disagree with the following statements? Percentage shown refers to the net of 'Strongly agree' and 'Agree' Base: News audience who accessed news through an online platform in the last week in all markets: aged 18-34 (n=2482); aged 35-54 (n=2359); aged 55+ (n=1406)

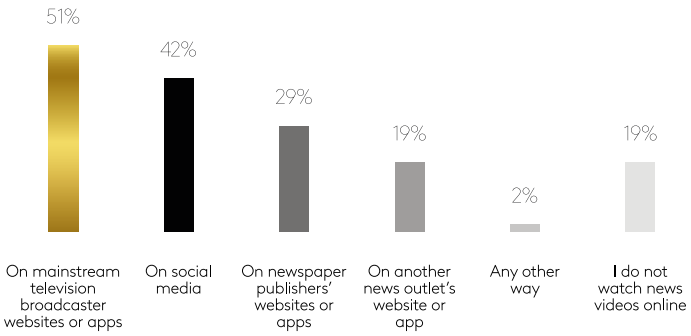
Implications

Personalisation is a mainstream consumer expectation online. While news organisations should seek to engage through personalized content, they must remain conscious that they also retain a social purpose in delivering news that people might not otherwise read. With the majority of news audiences worried that personalization means missing out on other views or stories, the line between curation and personalization is a fine one. News organisations will achieve strategic clarity through a holistic approach to brand management and product development, the latter iterated through data-driven testing.

3. Live and exclusive: the future of news video and TV online

The majority of news TV & video consumed online is currently being watched on mainstream broadcaster websites and apps, with social media coming second at 42% and newspaper apps and websites third at 29%. As would be expected, given the growth of online video in general over the past few years, it is the 18-34 year old age group who are showing a greater propensity for watching online news video across the board.

Figure 6.3a: Where news videos are watched online



Question: How do you watch news videos online? Base: News audience who have accessed news through an online platform in the last week in all markets (n=6247)

In line with general digital trends, online news video consumption is booming with 60% of news audiences claiming that they watch more in 2017 than they did in 2016. The reasons are varied, but it's not hard to build up a picture of how an essentially traditional news storytelling technique has taken on a life of its own online. Access to exclusive content is a big driver of news video consumption, while over half of news audiences find video easier to digest than the written word. In a world where attention spans are shortening and where everyone has access to a profound storytelling device in their pocket through their smartphone camera, the opportunities for online news video are far-reaching and suggest a bright future for mainstream media and digital platforms alike in terms of opportunities to engage news audiences.

Online news video is ripe for citizen journalism. While not everyone can master the technique of telling engaging stories through written word, anyone can point a camera at an event and either broadcast live (with implications for traditional mainstream broadcasters) or upload to social platforms within seconds. Trust, however, remains critical, with over two thirds agreeing that they trust online news video that originates from familiar news organisations.

TRUSTED

67% agree with
"I tend to trust online news videos more when they come from news organisations that I'm familiar with"

EXCLUSIVE

63% agree with
"Online news videos give me access to news that I don't otherwise see on TV news programmes"

LIVE

54% agree with
"I like watching online news videos that are broadcast live"

ACCESSIBLE

53% agree with
"I find online news videos easier to digest than written articles"

Question: To what extent do you agree or disagree with the following statements in relation to news videos online? Percentage shown refers to the net of 'Strongly agree' and 'Agree' Base: News audience who watch online news videos in all markets (n=5066)

Implications

While video production is an established part of a mainstream broadcaster's news operations, it is now almost as ubiquitous for the rest of the news industry, with there being few newspaper brands who have not ramped up their multimedia production facilities while hiring and training staff with the requisite storytelling skill-sets.

Online video is truly mobile (with 61% watching it on a smartphone or other mobile device) and with data speeds increasing while costs fall, this is a trend that is set to continue. To engage and grow younger audiences, the online news video opportunity should not be underestimated.

Cross-platform audience measurement is again a crucial consideration in the video space. Increasingly news audiences are platform neutral and a holistic approach must be taken to media measurement and tracking.

Collaboration in terms of distribution, data and ad monetization between digital platforms and news organisations will ensure that there is a steady flow of quality video content that benefits audiences and news organisations alike.

Final Thoughts & Key Considerations

News audiences in 2017 have a highly complex relationship with mainstream news. They have a surging appetite for news, while at the same time hold a firm belief that accuracy in journalism is a fundamental cornerstone of a democratic society. However, news organisations are under more scrutiny than ever before.

Their most trusting audiences consume more content and are more willing to pay to fund journalism both offline and online, yet at the same time this trust is being eroded by the taint of rogue "fake news" stories and accusations. While social platforms might be the catalyst for the growth in fake news, it is mainstream news that is often regarded as the originator and clearly a great deal of consumer education has to take place to help identify false reporting and stem its flow.

- **39% are using more news sources than they were a year ago**
- **73% believe that accuracy in journalism is key to a healthy democracy**
- **56% trust that what they read is true and not fake most of the time**
- **78% catch up on the news online**

The threat that fake news has on trusted news organisations, is part of a broader picture of the challenges around monetizing and distributing news content in a world where online is now one of the dominant platforms for new consumption. New challenges create new opportunities and the findings of this study reveal many positives for news organisations, advertisers and digital platforms alike with regards to the attitudes and appetites of news audiences.

Key considerations

... for News Organisations

- **Heritage and trust:** Mainstream news organisations and national newspaper brands must leverage the relationship that their most trusted readers have with them. They have a reputation for providing rich, quality, credible content and in a world where the majority of news audiences worry about the lack of choice in the future, these core attributes need to be leveraged.
- **Look to younger audiences:** 18-34 year-olds are more likely than older age groups to believe that they have a duty to pay for online content. They are voracious consumers of news content on social and in video and while a differentiated product offering for younger audiences with an enhanced value proposition is no easy task, it is a question that needs to be answered through focused product development and marketing strategies.
- **Distribution vs destination:** The decision whether to grow reach socially or to create a walled garden and monetize content through payments and subscriptions will be an ongoing dilemma for newspaper brands. However, with nearly two thirds of those who access news via social media claiming that they are aware of the news brand of origin when reading news socially – providing hope that news brand relationships can be built off-platform - a hybrid distribution, advertising and payment model is a strategic must for many organisations.

44%
are concerned that some news organisations going out of business means less choice for them. This rises to over half (52%) of 18-34 year-olds.

42%
of 18-34 year-olds paid for online news content in any form in the past year, almost double the proportion among those aged 35+ (22%).

42%
of news audiences visit news sites or apps directly, while discovery through content distributed through social media comes a close second at 36%.

... for Digital Platforms

- **Social news:** Over a third of news audiences read the news socially. The variety of news sources and opinions on offer and the participatory nature of social news in terms of commenting and sharing are key motivators. Tools that enable content discovery and that feedback monetizable data to news content creators will continue to be crucial.
- **Echo chambers:** While the echo chamber effect is said to have caused so many to have been surprised by recent election and referendum results, there is a clear desire from news audiences to do what they can to take in more diverse views and opinions. They want to take in different views to their own and worry about the effect that personalization will have on their breadth of news consumption. Digital platforms clearly have a tightrope to walk in terms of editing news and facilitating the ease of its consumption, but news audiences are receptive to bursting the filter bubble.
- **Tackling fake news:** While fake news has impacted trust in all media, trust in news on social and messaging apps has fared far worse. The digital platforms have a crucial role to play in helping the identification and labelling of fabricated content, while helping mainstream news organisations to assert the independence and credibility of their journalism. This will only have a positive halo effect on the digital platforms and efforts must be redoubled to build the tools to tackle fake news.

43%
consume news socially to access a wide variety of sources, while 40% do so to take in very different views to their own

64%
of news audiences worry that personalization may mean that they miss out on certain stories or perspectives

44%
of news consumers who have heard of 'fake news' believe that people choosing to access more credible news content is the most effective way to tackle fake news

... for PR Agencies

- **Leveraging trust:** Agency clients looking to leverage trust should look to mainstream news organisations as a channel to help them do so. Trust may be under threat from the forces of fake news, but mainstream news organisations still have a heritage to be explored as a conduit to improving credibility and corporate profile.
- **Brand storytelling:** Agencies should look to the experts (i.e. news organisations and platforms) when exploring storytelling techniques that will resonate with their target audiences. Video – particularly mobile and live content - will increasingly be part of all news organisations' armoury, along with the tools that balance the promise of personalization with the curation and recommendations of trusted journalists and editors.
- **Consumer scrutiny:** In a "post-truth" world, agencies must be conscious that news audiences are scrutinising stories more closely than ever. News audiences are curious and connected and agencies will need to be more diligent than ever before in promoting accurate content.

42%
want news content personalized based on what they have previously read

63%
of online news video consumers watch online news video to access exclusive content that they can't see on TV

54%
of online news video consumers want to watch news video broadcasts live online.

Final Thoughts & Key Considerations

... for Brand Owners

- **The halo effect of trust on ad effectiveness:** Ad spend is increasingly dominated by digital media and increasingly measured using short-term behavioural metrics. With consumers reporting that they pay more attention to ads in trusted environments, news media can provide a trusted context for advertising.

- **Cross-platform measurement:** Whilst techniques and technology are available, cross-platform audience measurement services deployed are lagging and do not effectively account for audience content consumption patterns. If news organisations enhance measurement capabilities to provide a holistic view of media impact across all platforms, commercial partners will benefit from cross-platform, cross-device insights to assess the effectiveness of display and content activity.

- **Authentic and sustainable brands:** Brand safety online is of paramount concern to advertisers who have spent years carefully cultivating audience perceptions in the offline space. Trusted news organisations can provide the quality, risk free environments and context so important for building a sustainable, trusted brand.

Those who trust newspaper brands are **65%** more likely than the average British adult to agree that they pay more attention to advertising on sites that they trust

67%
of news audiences access the news on a laptop/desktop computer at home or work,

58%
on a smartphone and

27%
on a tablet.

This report was created using multiple Kantar research methodologies and capabilities including:

LiGHTSPEED

The researcher's choice for understanding consumer opinions and behaviours. Lightspeed cultivates online panellists across the world to deliver business ready results quickly. For Trust in News, a survey of 2,000 news-reading adults (demographically representative) was commissioned each in Brazil, France, UK, USA.

KANTAR MEDIA

TGI:

Determines and quantifies consumer behaviour profiles and segments to reach the right people regionally or by country through a complete, all round understanding of consumer habits and behaviours by categories and brands in 70 countries: identify and reach any kind of consumer target, profile and segment online visitors, targets and competitors by both online and offline behaviour, enrich CRM databases and proprietary studies.

Media monitoring:

Our media analysis service helps brands and agencies to track a brands' media profile in editorial media, and understand what drives their media coverage, what influences their reputation, where they fit in the Earned media landscape. We identify whether their story is getting through, who is covering them (and who isn't), the hot issues, the risks and what their competitors are up to, on both online and offline media.

Bespoke Market Research, Analysis & Insights:

The Kantar Media customer research team are specialists in understanding how consumers relate to the media, within the wider context of their lives, our team generates actionable insights from research and analysis, so that clients can make informed decisions.

KANTAR

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