globalwebindex

News Consumption

Understanding the changing news landscape

TREND REPORT 2019

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Contents

Introduction

GlobalWebIndex Trend Reports explore some of the most pressing topics for marketers, from traditional vs digital media consumption to audience measurement issues. In this report, we place the spotlight **on news media and news consumption**.

This report explores:

- **What news services are leading in terms of awareness, trust, accuracy and relevance?**
- **How is news consumption shifting to mobile and social platforms?**
- **How are news media transitioning to new revenue models?**
- **What is the changing face of news readers?**

This report covers a broad list of 38 news services with additional brand perception data for 27. All in all, the report is based on a sample of 138,962 respondents, with additional data on individual news brands from a subsample of 51,333.

Key insights

News consumption is high and constant among internet users. Six in 10 internet users say keeping up-to-date with news and current events is a main reason they use the internet. In practice, even more of them use the internet for that purpose: More than 8 in 10 internet users have visited a news website, app or service in the past month.

Just 10% of consumers have paid for news content in the past month. Despite subscription services and micropayments for individual articles widely being seen as the future of news revenue, this low figure has remained static since GlobalWebIndex tracking began.

CNN and BBC news are the best-known and most major news services, measured by the share of readers who describe them as trustworthy and accurate. Newer, previously entertainment-oriented media, like Buzzfeed and Konbini, are rated as trustworthy and accurate by a much smaller share of their readers but are considered more 'relevant for me.'

People who express a general interest in news and current affairs tend to be older, moderately more affluent and moderately more highly educated than the average internet user. People who buy online news content also have a higher socio-economic skew but tend to be younger.

News apps are becoming more prominent. The share of consumers who have one installed on their phone has roughly doubled since 2013. They still trail social media as a source of discovery for news content.

Four in 10 internet users cite keeping up with the news and current events as a main reason they use social media. On specific platforms, people who are on social to keep up with news account for between 26% (KakaoTalk in South Korea) and 56% (Path in Indonesia) of users with an average of 45% for individual platforms globally.

Facebook leads in online news consumption among the major international social media platforms. 27% of internet users have read a news story on Facebook within the past month. This lead is largely driven by Facebook's greater reach, though. 43% of Facebook users have read a news story on the platform, compared to 50% of Twitter users.

Consumer context

The news media industry faces multiple, mutually reinforcing challenges – crises of trust, revenue and reach. Yet demand for news is high, consumption is pervasive, and new revenue models are being developed. The big question now is how the challenges and solutions will combine and where that will leave the news landscape in years to come.

The news break on Twitter, even if they're still being broken by Reuters. As GlobalWebIndex's latest figures show, the demand for news content is holding strong. Even if fewer younger people say they're interested in news and current affairs, this might just as well reflect where they are in their lives rather than a fundamental difference. Many are still reading news stories in their feeds, watching news clips and getting updated through messaging and visual apps.

Across multiple markets and demographics, time spent watching linear TV has been declining strongly since 2012 (cf. our Entertainment flagship report). **Factual news content in the form of documentaries are popular on streaming and on-demand services, but newer players have yet to produce television-style news**, so the challenge faced by news media on linear TV is even greater than for fiction and entertainment.

> As print circulation falls and ad revenue drains into social media, news media scramble for new sources of revenue.

This has meant that **revenue models have had to be rethought**. Some publishers have done this successfully, but others struggle. The much-hailed pivot to video was premature, causing bad investments and major business setbacks for titles that have otherwise done well in the new media landscape.

Six in 10 internet users say keeping up-to-date with news and current events is a main reason for using the internet. In practice, even more of them use the internet for this specific purpose: **More than 8 in 10 internet users have visited a news website, app or service in the past month.**

How interested are people in the news?

% who list the following as interests

Music	60%	Television	60%
Films/cinema	57%	Technology	57%
Food & drink	54%	News/current affairs	54%
Travel	52%	Eating out	52%
Cooking	50%	Fitness & exercise	50%

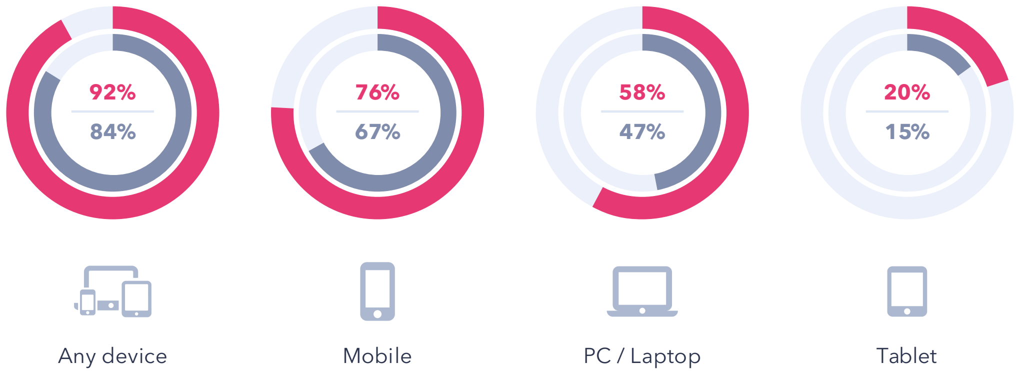
Question: Which of these things are you interested in?
Source: GlobalWebIndex Q4 2018
Base: 138,962 Internet users aged 16-64

Consumer context

Reading the news online

% who have encountered news content online, by device

Interested in news   All



Our figures show that **the global share of internet users who've paid for news content in the past month has been stagnant for at least five years.** Growth in Asia and some bounceback in MEA markets has sustained the global average despite real declines particularly in Latin America, where we otherwise tend to see high levels of digital engagement.

Markets where the online population is younger, where more people use mobile payments, and where the news landscape is less TV and radio-focused have more people paying for news services. The overall degree of digitization has large effects even between otherwise similar countries.

The situation in Sweden and Denmark, for instance, has diverged despite the many similarities between the countries. In Sweden, Aftonbladet gained 250,000 subscribers in a country of 10 million, creating an exemplary paid content model with subscribers that lacks an equivalent across the narrow belt that separates the countries.

TREND IN ACTION

Aftonbladet

As reported in Digiday, Aftonbladet operates a freemium subscription model that reserves 6-8% of the sites' content (around 25 articles per day) to subscribers. Pricing relies heavily on an introductory trial period. Users sign up at 1 SEK per month – just under 11 cents (US) – for the first month and going up to 59 or 99 SEK for the premium and premium plus packages.

Sports content has been especially important in this process. By monitoring the highest-performing articles and targeting them for follow-up articles and premium newsletters, Aftonbladet entice and retain subscribers across the board.

In doing so, Aftonbladet are reacting to a trend we see across the world: Internet users are more than twice as likely to have paid for entertainment content in the past month than news (see chart: Other Content Bought).

Question: In the past month, which of the following things have you done on the internet via any device?
Source: GlobalWebIndex Q4 2018
Base: 115,393 Internet users aged 16-64

Consumer context

Internet users in Sweden are more than 30% more likely to have bought news content online than those in Denmark: 5% vs 7% as of Q4 2018, and a full 66% more likely than the average user in Europe. Sweden's highly developed mobile payments infrastructure, for instance, also helps boost this ratio.

Globally, APAC and to a lesser extent Latin America lead in paid news, while older online populations in North America and Europe hold back. In China, more than 16% of internet users say they have, compared to just 4% in the U.S. Because of the size of its online population, the U.S. still has the third largest online paid news market in the world after China and India, and followed by Brazil (7% penetration) and Indonesia (7%).

Accordingly, the largest online news markets are China (16% penetration), India (14%), the U.S. (4%), Brazil (7%) and Indonesia (7%). With just 2%, **Russia has the lowest share of respondents who report having paid for news in the past month** – in fact, just 28% have paid for any digital content.

Online news is inseparable from life online.

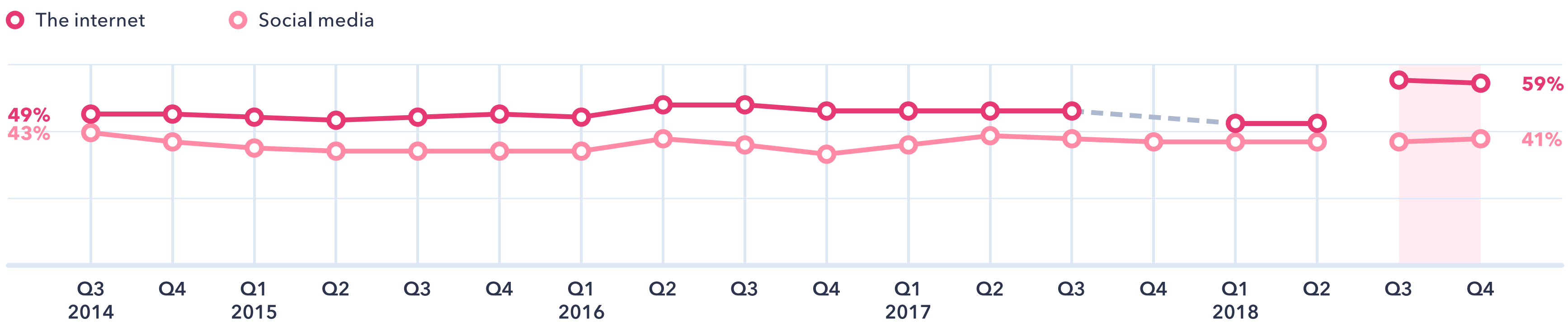
Despite the crisis in confidence and controversy around trust, accuracy and fake news in recent years, **demand for news content remains consistently high** – across a wide range of demographics throughout the world. There's been no appreciable change in the role news plays in motivating people to use the internet or social media.

48% of internet users list news and current affairs as an interest of theirs. Online news is an ingrained part of how most people use the internet, whether they consider themselves interested in news and current affairs or not.

International news services, led by CNN and BBC News, enjoy tremendous name-recognition (more than 75% globally) and strong degrees of trust in their accuracy and expertise that newer titles, like BuzzFeed, have been unable to rival. **It's a new landscape, but one where established players have strong fundamentals.**

Importance of news as a motivator over time

% who cite keeping up on news as an important or main motivation to use



Note: Methodology changed after Q2 2018 to update question wording, which boosted the answer rate. Countries included are those which participated since first included wave: U.S., UK, China, India, Germany, France, Spain, Italy, Canada, Russia, Brazil, Australia, Mexico, Japan, South Africa, Singapore, Indonesia, Philippines, Hong Kong, Malaysia, Sweden, South Korea, Poland, Netherlands, Saudi Arabia, Thailand, Vietnam, Turkey, Taiwan, Argentina, UAE, Ireland. Not included: Austria, Belgium, Colombia, Denmark, Egypt, Ghana, Kenya, Morocco, New Zealand, Nigeria, Portugal, Romania or Switzerland. With alll current countries, the percentage are 59% and 41%, respectively.

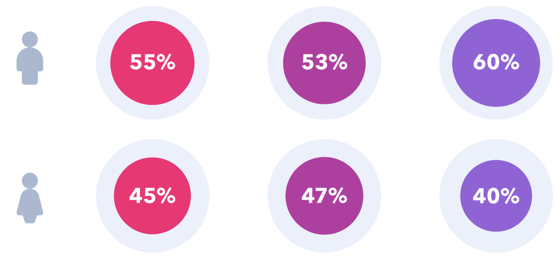
Question: How important are these reasons for you using the internet? [Very important], (until Q3 2018, after which "Which of these things are important reasons for you" using the internet?"); "Which of these are ...
Source: GlobalWebIndex Q3 2014-Q4 2018
Base: 614,365 Internet users aged 16-64.
Question not included in Q4 2017. Latest wave included 115,393.

News consumers

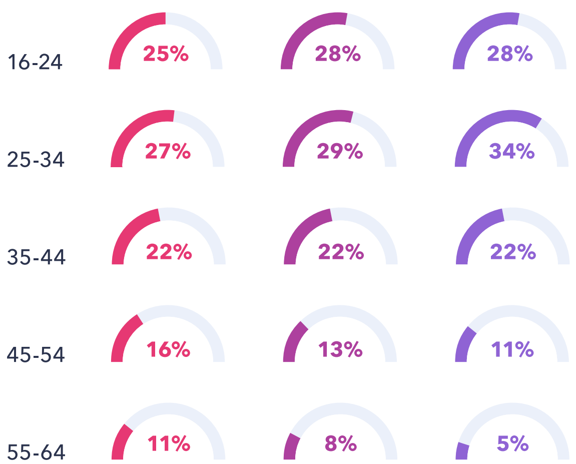
Demographics of news readers

● Interested in news ● News networkers ● Paid for news

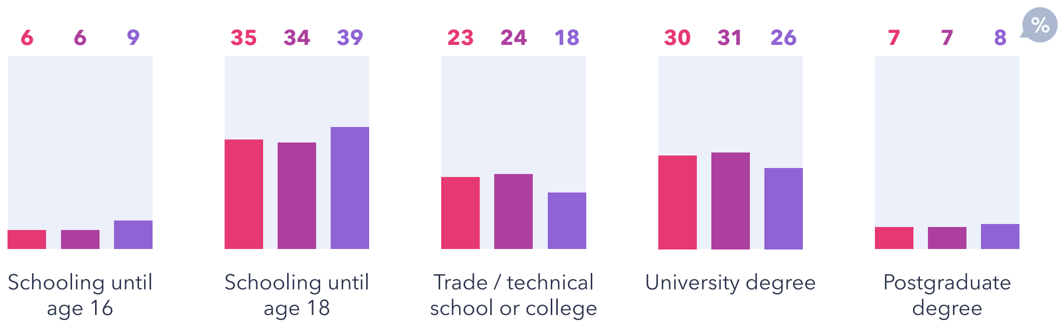
GENDER



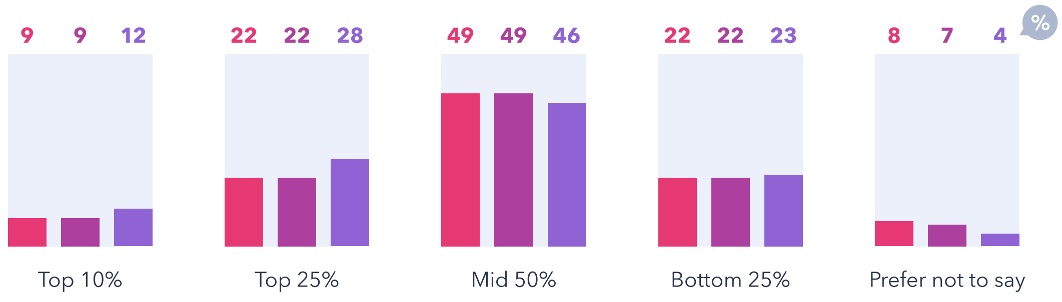
AGE



EDUCATION



INCOME



Question: What best describes the highest level of education you have achieved? / What is your yearly household income before tax or any other deductions? Please think about the income of your entire household each year (not each month). / How old are you?
Source: GlobalWebIndex Q4 2018
Base: 70,572 news interested; 60,130 news networkers; 9,693 news buyers, aged 16-64.

News consumers

> Major news service engagers are younger, more affluent, and more highly educated.

On the consumer level, there is a strong pattern for engagement with major news services and higher socio-economic status on a variety of socioeconomic criteria, including education and income. **The major news services draw a more educated audience.**

For instance, people who've engaged with either CNN or BBC News – the two largest services we track – are 1.3 times more likely to hold postgraduate degrees, and 1.26 times more likely to be in the top 10% income bracket. 6 in 10 are under the age of 35, and they're much more likely to be using social media to keep up with news.

Deeper digital engagement with news derives from digital habits, not news interest.

- 48% say they are interested in news and current affairs
- 22% qualify as news networkers*
- 11% have paid for news content in the past month

* To see how this and other social media segmentations are defined, click here

News consumers

People who are interested in the news are 29% more likely than the average internet user to be 55-64 years old 17% more likely to hold university degrees. These are their two most defining demographic characteristics.

People who pay for content are younger, more highly educated, and have higher incomes. These are also traits GlobalWebIndex research shows association with openness to new technologies. All in all, they're 65% more likely to be in the top socioeconomic quintile (26% are.) – and just in 1 in 20 are in the 55-64 age range.

> Much work can be done to on-board older readers to new revenue and subscription models.

News networkers, people who consume and share news on social media, conversely have no clear-cut age profile. This category contains both younger people who are more engaged in social media across the board and older people with their higher interests in the news, effectively canceling out any age bias in this group.

> Paying for online news is associated with higher cross-channel news consumption.

Contrary to what you might expect, people who pay for digital news spend more, not less, time reading physical print titles. On average they'll spend 1:15 minutes reading the physical print press, compared to 40 minutes for people with a general interest in the news. Online press has taken a lead among this segment, who report spending an average 56 minutes per day reading online press.

There are some differences in opinion, too. Whereas 61% of people who are interested in news say they're also interested in international events, 70% of digital news buyers list it as an interest. It isn't a startling difference, but it shows a subtle change in priorities that fewer people who buy content say keeping up with news/events is an important reason they use the internet (56% vs 75%).

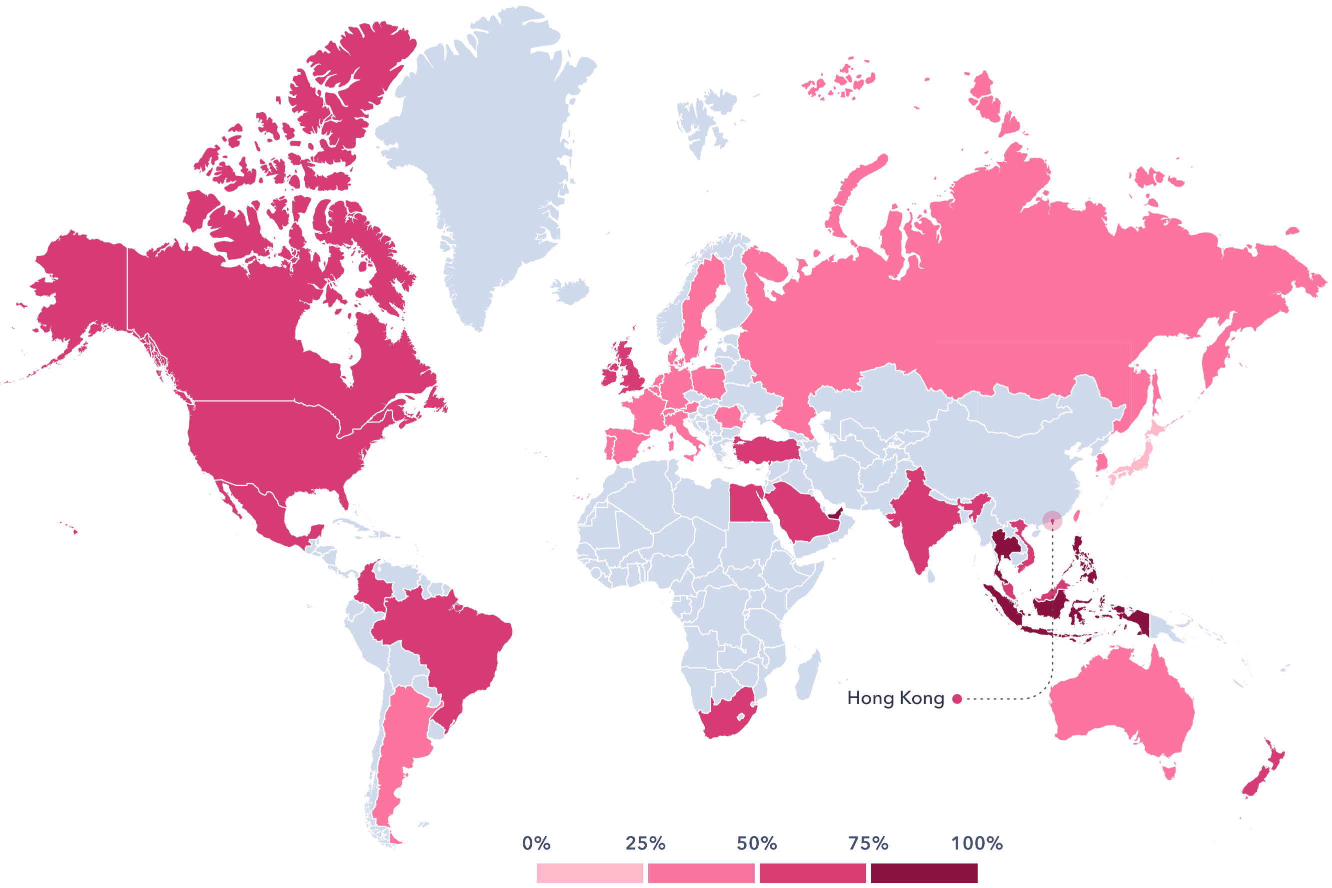
As you'd expect from a relatively older audience, more of the people who are interested in news discover news through Facebook, but they're still a minority of internet users: Just 35% have done so in the past month. It leads as a news source across the board for the channels we track, however.

People who pay for news content are more likely to use major news services. News-interested people over-index for each of the news services we track, but to a lower extent. This is a global effect that goes across all the channels, though there are some outliers – most in business and sports-press. People who buy news content are nearly 5 times more likely to have engaged with the online news site Quartz, for instance. They're more aligned when it comes to the more general sources like CNN, Reuters and BuzzFeed.

News services

International news service engagement by country

% who have engaged with 1 or more international news services tracked



Philippines	85%
Thailand	76%
Indonesia	75%
UAE	75%
India	72%
South Africa	70%
Vietnam	69%
Singapore	67%
United Kingdom	67%
Malaysia	67%
Ireland	65%
USA	63%
Mexico	63%
Turkey	62%
Egypt	60%
Colombia	59%
Saudi Arabia	59%
Canada	57%
Hong Kong	57%
New Zealand	55%
Brazil	52%
Australia	48%
Romania	47%
Italy	44%
South Korea	42%
Switzerland	42%
Argentina	41%
Spain	40%
Taiwan	40%
Portugal	40%
Austria	39%
Poland	36%
Sweden	36%
France	34%
Germany	34%
Denmark	33%
Russia	31%
Belgium	29%
Netherlands	26%
Japan	24%

Question: When using the internet in the last 30 days, have you seen an online article, video or news story from any of the following services?
Source: GlobalWebIndex Q4 2018
Base: 51,983 internet users aged 16-64

News services

> 88% of global internet users know of the BBC or CNN and 37% have engaged with them in the past month.

Global engagement

In addition to news websites that are reported on the market level, GlobalWebIndex tracks 38 large international news services for awareness and online engagement. The largest have multilingual content, but the majority are English-first, which helps explain why they can struggle to achieve a strong presence in some markets.

52% of internet users will have engaged with content from one of the news services in the past month. That figure ranges from 24% in Japan, with its vibrant domestic news landscape and relatively few foreign-language speakers, to 85% in the Philippines, where English is an official language and 66% strongly agree that they are interested in international events, compared to just 22% in Japan with the same interest.

Trust issues and news media

For 27 of the news services, respondents were asked whether they associate the news services they are aware of with three factors: trustworthiness and accuracy, expert analysis/opinions, and personal relevance.

Globally, 69% of respondents described one or more of the news services as trustworthy and accurate, and 55% described two or more so in those terms. Seeing as this does not include national news services, many of which have very high monthly visit rates (see Market by market chart). It's difficult to spot a general crisis of trust at the current moment, but the services do vary tremendously in terms of the qualities they're associated with.

Trust, expertise and relevance of a news brand isn't uniformly distributed.

News services

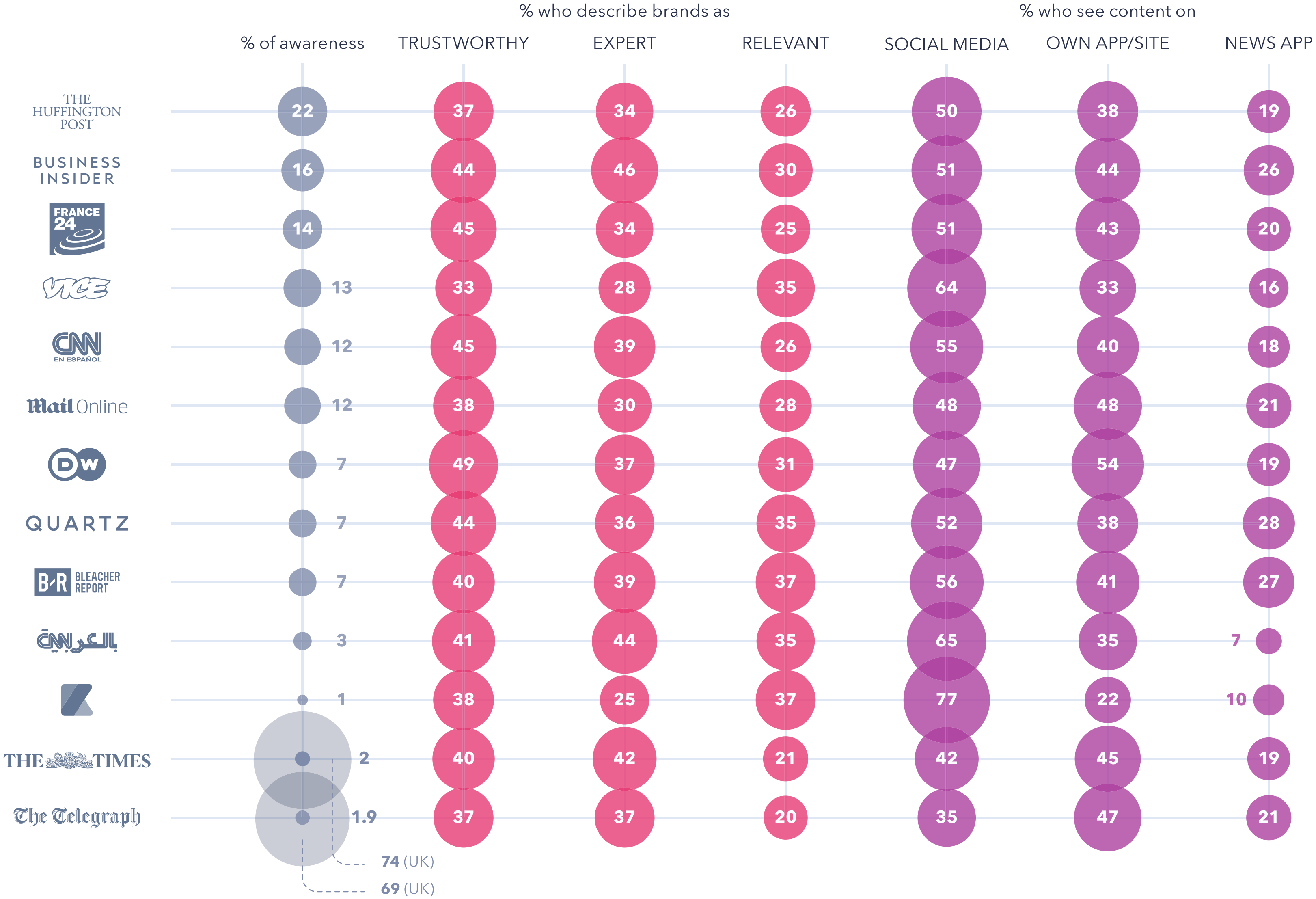
Awareness, perceptions and discovery of new brands

		% who describe brands as			% who see content on		
	% of awareness	TRUSTWORTHY	EXPERT	RELEVANT	SOCIAL MEDIA	OWN APP/SITE	NEWS APP
CNN	78	48	38	26	50	44	20
BBC NEWS	76	52	44	26	51	46	19
CNBC	54	43	34	25	47	47	22
NBC	53	44	33	24	46	42	25
The New York Times	46	48	42	24	47	45	23
Bloomberg	40	42	36	24	49	43	25
WALL STREET JOURNAL	36	44	43	22	43	44	27
the guardian	28	45	38	23	44	44	23
euronews.	28	44	33	28	41	47	25
The Economist	27	46	49	26	48	44	26
MSNBC	25	41	33	27	45	43	28
Newsweek	25	41	33	23	45	37	33
BuzzFeed	24	29	23	38	69	35	15
REUTERS	23	49	39	26	42	42	24

Question: Which of these news services have you heard of?
Question: When using the internet in the last 30 days, have you seen an online article, video or news story from any of the following services? This could be on any website or app, on social media, or anywhere else on the internet.
Question: Please could you select the qualities that you would associate with each of these news brands? For each brand, please select all descriptions you think apply.
Source: GlobalWebIndex Q4 2018
Base: 51,983 internet users aged 16-64

News services

Awareness, perceptions and discovery of new brands



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Source: GlobalWebIndex Q4 2018
Base: 51,983 internet users aged 16-64

Spotlight: **Political division in the U.S. and UK**

In the UK, BBC News is rated as the most trustworthy and accurate, Conservative and Labour alike.

With the exception of the Guardian, Conservatives overall were somewhat more likely to rate news services as trustworthy and accurate than Labour voters. The Times has the largest gap in perceived trustworthiness and accuracy in the UK – 38% of Conservatives vs. just 25% of Labour supporters. **Across the board, UKIP voters are least likely to express trust the major news services**.

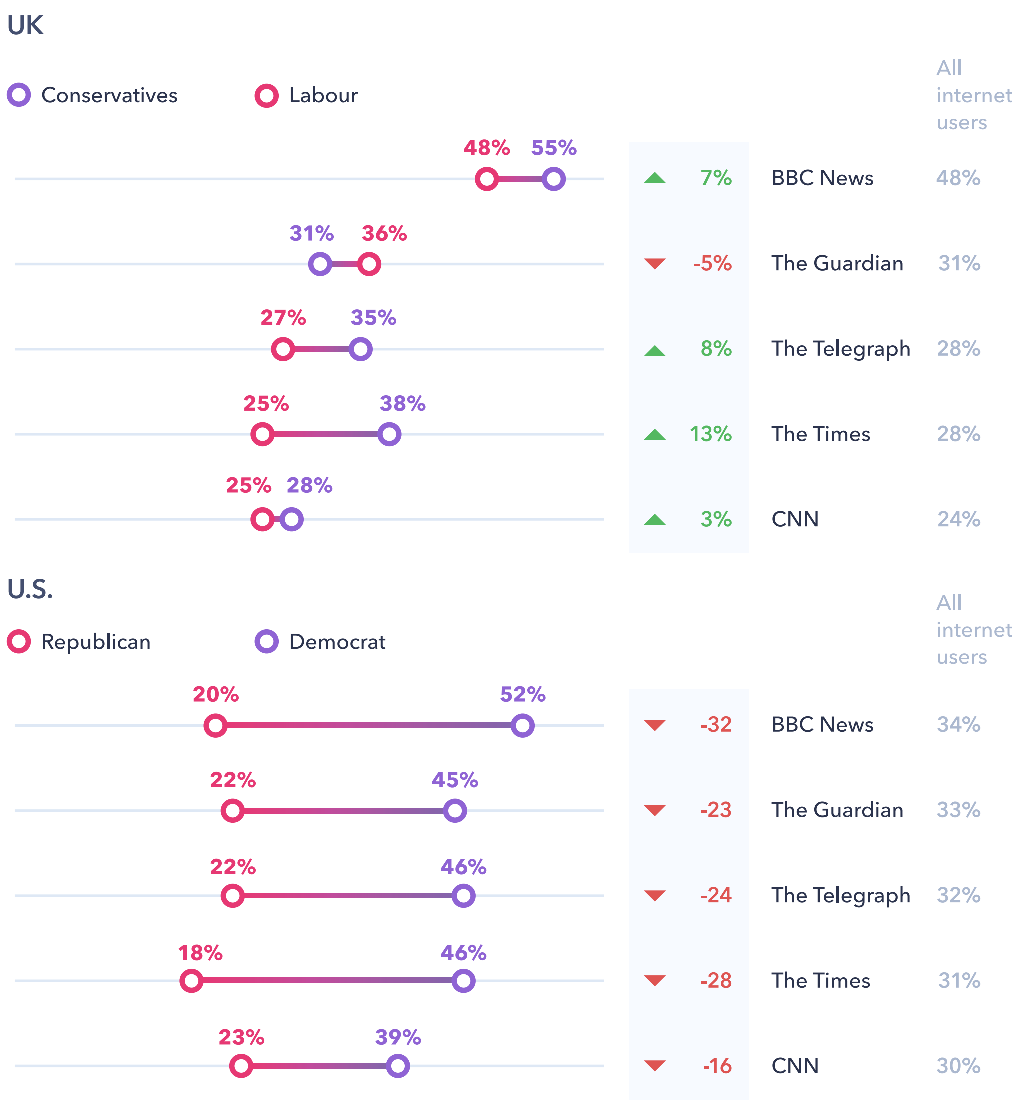
Republican voters in the U.S. show far lower trust in news services.

The Left-Right division in the United States goes the opposite direction, however, at least with regard to major news services. Far fewer Republicans than Democrats rate the top news services as trustworthy and accurate.

The political division is reflected strongly in U.S. television, which is the largest news source for older voters. The largest gaps are Democrats' much higher propensity to watch CNN (45% have in the past year, vs. 27% of Republicans) and FOX -watched by 63% of Republicans - vs. just 48% of Democrats. (Note that the survey covers FOX as a network rather than FOX News specifically.)

Political gaps in trust toward news services

% who describe the brand as trustworthy and accurate



Question: Please could you select the qualities that you would associate with each of these news brands? For each brand, please select all descriptions you think apply
Source: GlobalWebIndex Q4 2018
Base: UK: 963 Conservative voters, 1,287 Labour voters aged 16-64. U.S.: 2,304 Republican voters, 2,506 Democratic voters aged 16-64.

Spotlight: **Political division in the U.S. and UK**

Trust vs. relevance

There is an inverse relationship between those who describe the service as 1) "trustworthy and accurate" or "gives expert opinion/analysis", (which tend to go hand in hand), and 2) "relevant for me".

The largest divide at the moment is between established and social-entertainment oriented media.

Publications like BuzzFeed Vice, Konbini and Bleacher Report that focus on sports, entertainment and pop culture generally do better in terms of being "relevant for me" with their readers.

More traditional outlets like, such as BBC News are rated as relevant by 20-30% of the audience, but conversely, they are described as trustworthy and accurate by much higher shares of readers. Buzzfeed, Vice, and the Huffington Post – all international online media – have the least trust and perceived expertise.

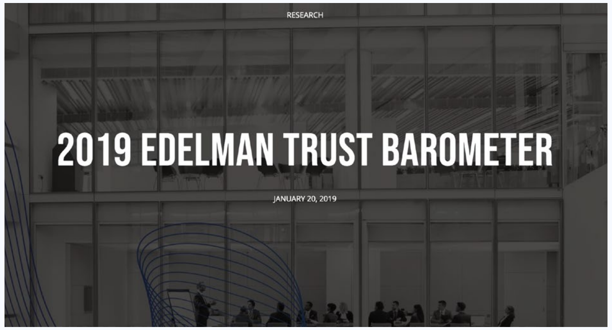
Traditional vs. social media-focused

Publishers' different strategies and audiences are strongly reflected in their readers' paths to their content. Social media is how the largest share of readers say they've come across content from the different news services, but the split between direct and social traffic is roughly equal.

Konbini, Vice, Buzzfeed, the Bleacher Report, and CNN's Arabic and Spanish language services have unusually high ratios of engagers who say they've seen found the sites' content through social media.

As described in the sidebar, the generally low trust in social media likely rubs off on the brands that primarily find their viewership on those channels. The fact that content is being surfaced algorithmically rather than through editorial discretion has incentivized brands to release "clickbait" titles and highly shareable content - seemingly at the expense of building other brand values.

Consumers are relying on traditional news outlets to fact-check



With fake news concerns taking hold, consumers are turning away from social media as a source of truth. **Edelman's 2019 trust barometer** found that trust in traditional media outlets is at its highest historical levels (65%), while trust in social media remains relatively low (43%).

Source: Axios

Edelman has also seen news consumption sky-rocket since last year, but unfortunately consumers are encountering challenges in their quest for information; 73% of people surveyed were worried about fake news being used as a weapon. Amid all the media chaos and unreliable news, consumers are increasingly turning to traditional outlets as a safety net for reliable information.

Changing device landscape

From print to radio, TV, PC and mobile, news media have led media transitions in the past 100 years by helping to provide the content that attracted audiences to each channel. As we rapidly move toward a mobile-first internet, there's been a corresponding shift in where and how people consume the news.

The mobile tipping point for news has come and gone.

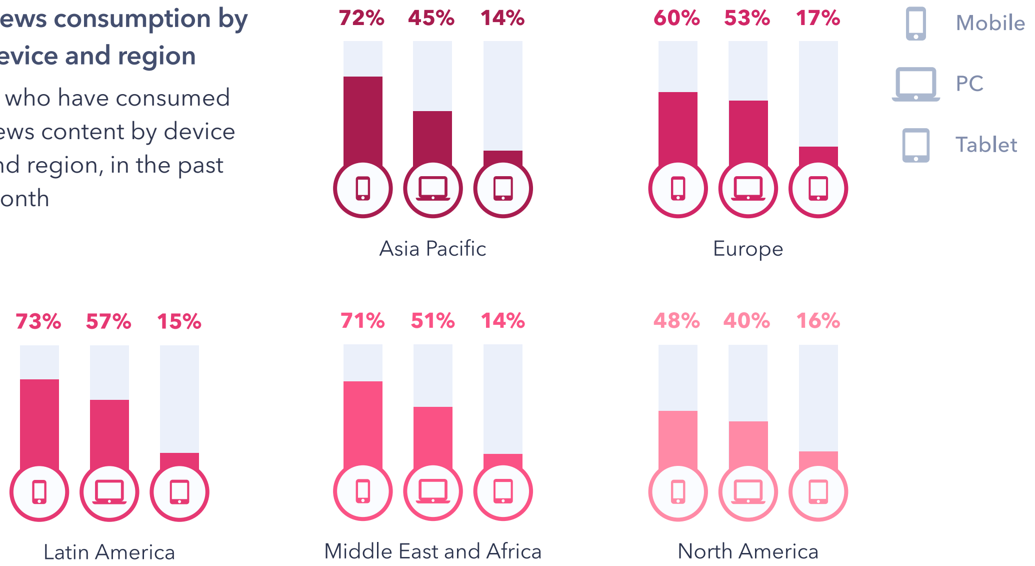
As of Q4 2018, 44% of internet users have a news app installed on their phones, and this number has increased dramatically in the past five years as life online has become increasingly centered on mobile devices. In every region of the world, more people have looked at the news through their mobile phones than any other device, with leads ranging from 27% in APAC to 7% in Europe.

Publisher and news aggregator apps are fighting it out.

Having news apps installed isn't tantamount to using it, though, at least not for the larger news services. Consumers say they see content from a news service on social media more than any other source, though the publishers' own apps and websites were the second-most commonly cited source. Just 17% say they have seen an article or other piece of content on a news app.

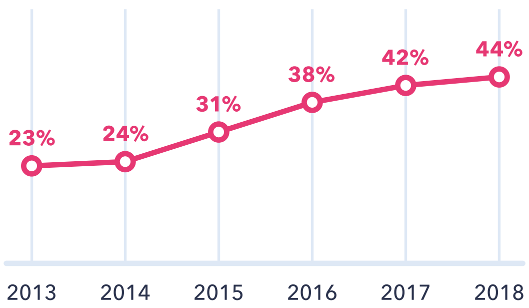
News consumption by device and region

% who have consumed news content by device and region, in the past month



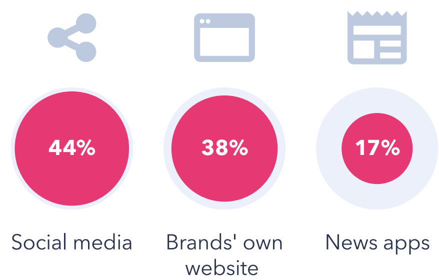
The growth of news apps

% who have use news apps on their smartphones or tablets



Where news service content is seen

% who have seen news in the following places



Question: In the past month, which of the following things have you done on the internet via any device?
Source: GlobalWebIndex Q4 2018
Base: 115,393 Internet users aged 16-64

Question: Thinking about mobile / tablet apps, which of the following categories have you used in the past month?
Source: GlobalWebIndex 2013-2018
Base: 1,357,273 internet users aged 16-64. 138,962 in last wave. Countries added on a rolling basis.

Question: For these services, could you tell us where you have seen one of their videos, articles or stories online during the last 30 days?
Source: GlobalWebIndex Q4 2018
Base: 138,962 Internet users aged 16-64

News on social media

All in all, GlobalWebIndex categorize 55% of internet users as news networkers. They make up between 45% (North America) and 66% (Middle East-Africa) of global internet users, which shows its ubiquity as part of life online.

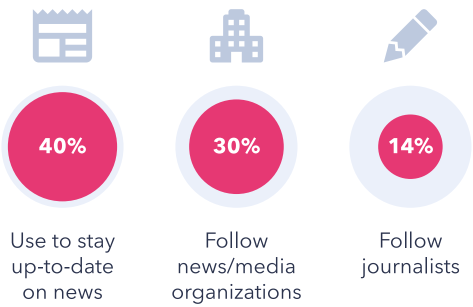
30% of internet users follow a news or media organization on social media, and a further 14% follow journalists – but interest extends far beyond those. A full 41% say staying up to date with news and current events is one of the main reasons they use social media. This has been consistent with only minor variations since 2014, when tracking began.

Facebook leads in online news among the major international social media platforms. 27% of internet users have read a news story on Facebook within the past month, compared to 20% on Twitter, 22% on YouTube (watching a news clip or story), and 3% who've viewed a Discover content on Snapchat (e.g. from CNN or the Daily Mail).

This lead is largely just driven by Facebook's greater reach, though. 43% of Facebook users, 51% of Twitter users, 31% of YouTube users, and 15% of Snapchat users have engaged with news content on the platforms.

News on social media

% who use social media in the following ways



News activities by platform

% of members who have...

Voice for news

In 2018, The New York Times took in $800 million from subscribers and – remarkably for this day and age – was able to expand its staff to an all-time high, even as other publishers see large layoffs. Their now 3.1 million digital subscribers are bringing them closer to their goal of $1 billion in subscription revenue for 2019.

Some outlets, such as the Economist, have introduced pared-down versions of their content as a way of appealing to readers who might not be inclined to sign up for a full subscription, or readers who **feel overwhelmed by the amount of content put out**. Espresso, their morning news app, reached more than 1 million downloads a year after its launch, and has helped the Economist in its efforts to retain and grow its base of almost 800,000 digital subscribers.

Source: The New York Times

*from providers like DailyMail, CNN, etc.

Question: What are your main reasons for using social media? **Question:** Who do you follow on social media? **Source:** GlobalWebIndex Q4 2018 **Base:** 115,393 Internet users aged 16-64.

Question: Which of these things have you done within the last month on [Platform]. **Source:** GlobalWebIndex Q4 2018 **Base:** Users of Facebook (101,606), Snapchat (31,978), Twitter (51,720), YouTube (108,019), aged 16-64.

News revenue models

Traditionally, news outlets derived most of their revenue from advertising. In the US, for instance, advertising provided about 80 percent of newspaper revenue in the year 2000 at the culmination of a century-long trend.

This revenue model is under serious pressure. Ad-spend has shifted away from news media, especially print ones, and onto social platforms and digital display. Revenue from classifieds, once a crucial part of newspaper revenue, was devastated by the advent of sites like Craigslist.

News content is as popular as ever, but it's been far from clear how news publishers would be able to monetize it. News consumption through social media, aggregators and news apps like Apple Pay have hurt news publishers and continue to.

Publishers have responded in a variety of ways: from **legal action against news aggregators** and social platforms to soliciting donations from readers, as the Guardian has done since 2015.

By and large though, the financial future of publishing seems to lie in subscriptions. As the Reuters Institute put it in its Journalism, Media and Technology Trends and Predictions 2019:

"Over half (52%) expect [subscription and membership] to be the MAIN revenue focus in 2019, compared with just 27% for display advertising, 8% for native advertising and 7% for donations. This is a huge change of focus for the industry."

More and more publishers put their content behind paywalls or limit the number of articles non-subscribers can access per week. Introducing micro-payments, meter-controlled pay-as-you-read models for individual articles have been much discussed, even as a possible application of blockchain technology, but so far, more traditional subscription models prevail.

New subscription models

64% of people who have paid for news content in the past month have also listened to a podcast, compared to just 38% of the general online population.

So far, news services haven't quite managed to board the smart speaker bandwagon, as publishers' experiment with content formats and narration styles.

A startup called Noa is looking to address this by letting users hear journalists read news stories. With consumers engaging more and more with audio content/podcasts, the winner-take-all dynamic on smart speakers could greatly boost the first publishers to properly crack it.

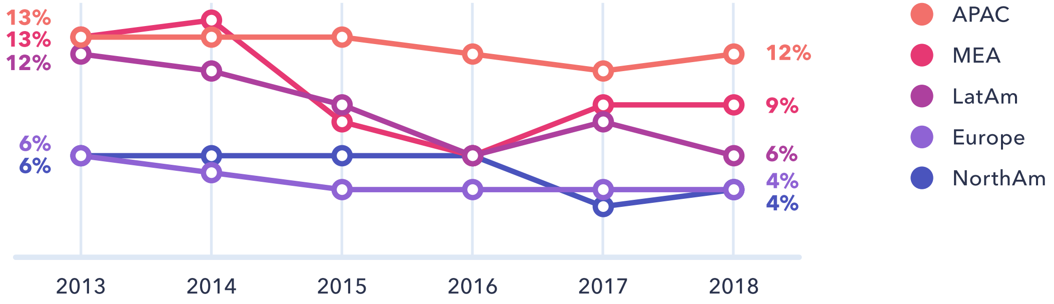
Footnote: **"Business Models of Newspaper Publishing Companies," Where News? Research Report No. 1, 05.2006. Darmstadt, Germany: IFRA**

Footnote: **Editor & Publisher**, 2006

News revenue models

News service monetization over time

% who have paid for online news content in the past month



Paid for digital news content by country

% who have paid for online news content in the past month

News service | Online magazines

	News service	Online magazines
China	16%	13%
India	14%	12%
Saudi Arabia	14%	9%
Vietnam	13%	8%
Kenya	12%	8%
UAE	12%	7%
Morocco	10%	5%
Hong Kong	9%	5%
Nigeria	8%	8%
Egypt	8%	6%
Ghana	8%	6%
Taiwan	8%	5%
Thailand	8%	6%
Turkey	8%	7%
Malaysia	7%	6%
Brazil	7%	5%
Poland	7%	5%
Singapore	7%	6%
Indonesia	7%	5%
Sweden	7%	6%
Philippines	6%	5%
Romania	6%	6%
South Africa	6%	5%
Austria	5%	6%
Mexico	5%	5%
Denmark	5%	4%
South Korea	5%	3%
Germany	5%	4%
Argentina	4%	4%
Belgium	4%	3%
Switzerland	4%	6%
Colombia	4%	3%
USA	4%	4%
Australia	4%	3%
Ireland	4%	3%
Spain	4%	4%
UK	4%	4%
Canada	4%	3%
France	4%	3%
Italy	3%	4%
Japan	3%	3%
Portugal	3%	2%
New Zealand	2%	2%
Netherlands	2%	2%
Russia	2%	1%

Nevertheless, GlobalWebIndex data suggests that publishers could be competing for a limited, relatively static pool of consumers who are willing to pay for news content. Since 2013, the share of consumers who have paid for news content within the past month has declined: from 11% to 9%, keeping the surveyed countries constant. If we look at the entire panel now available as of 2019, the figure creeps up to 10%.

There's a large regional discrepancy here. Respondents in the Asia-Pacific region are 1.3 times more likely to have paid for digital news content in the past month. 16% of internet users surveyed in China and 14% of those in India report having done so. Compare this to the 6%, 4% in the United States, and barely 2% in Russia, and the gap becomes even more apparent. Given the relative sizes of the populations, well over three-quarters of people who've paid for news content reside in the APAC region.

China, where internet users are 1.7 times more likely to have paid for news content in the past month, accounts for a whopping 47% of the market. Another 14% are in India, which has 1.5 times the average number of content buyers.

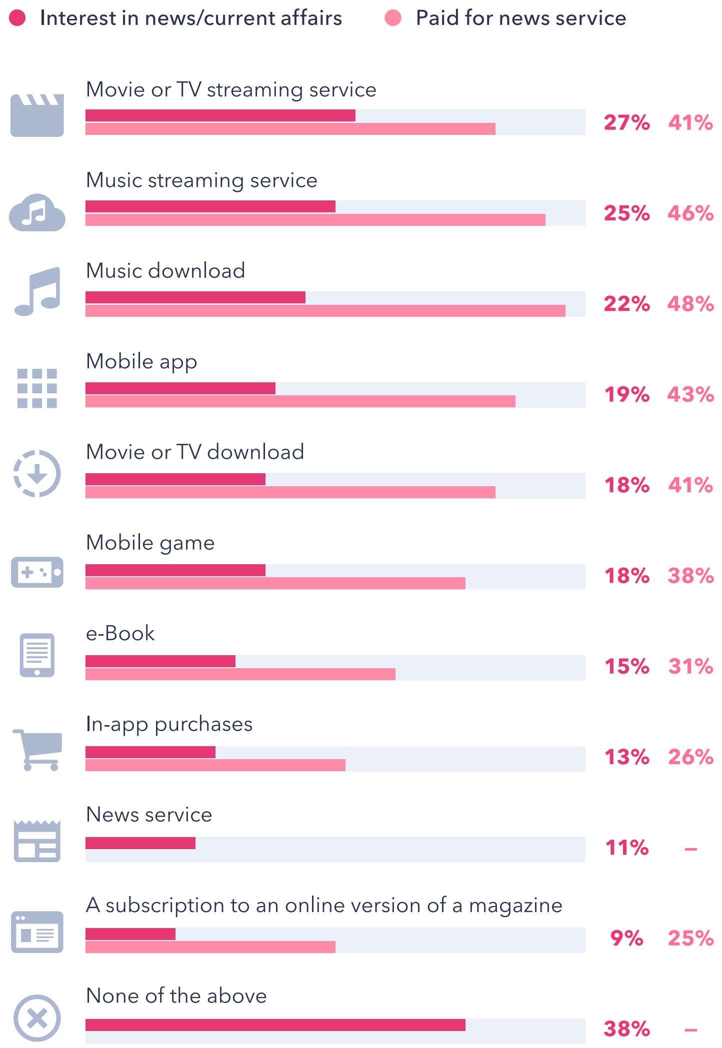
Question: Which of the following types of online content have you paid for in the past month? Answer: News service
Source: GlobalWebIndex 2013-2018 (Markets kept constant)
Base: 1,357,273 internet users aged 16-64. 138,962 in last wave. Countries added on a rolling basis.

Question: Which of the following types of online content have you paid for in the past month? Answer: News service
Source: GlobalWebIndex Q4 2018
Base: 138,962 Internet users aged 16-64

News revenue models

Other content bought

% who have paid for each content type in the past month



Across several measures, from adoption of messaging apps to online shopping, respondents in the Asia-Pacific region are quicker to adopt new technologies and tech trends before they catch on in other regions. The relative youth of the online populations in this region has a major impact, but in no demographic does the share of people who've paid for news service content in the past month creep above 13%.

> Quartz attracts the most readers who pay for news content.

Of the 38 mostly international news services we track, Quartz have the highest ratio of content-buying readers - defined as people who have read an article from the publication within the past 30 days. A full 26% of their readers had paid for news content in the past month. The International Business Times, with its readership centered in India and South East Asia, has the second highest rate (24%).

Deutsche Welle, the German international broadcaster, has the second highest percentage of readers who have purchased some digital news content – but again, this is associated with their high market penetration in some Asian markets.

Question: Which of the following types of online content have you paid for in the past month?
Source: GlobalWebIndex Q4 2018
Base: 138,962 Internet users aged 16-64

News revenue models

> Just 9% of people who list keeping up-to-date on news as a main reason for internet usage have bought news content in the past month.

Stated interest in news and current affairs isn't associated with a higher propensity to buy news content (12% vs. 11%). They tend to be older, which has a major bearing on their media habits. Thus, there remains a major challenge in the short and medium term in bringing existing newsreaders fully on-board online.

> The overall propensity to buy content is the most important factor.

In other words, their stated interest in the news isn't translating into a higher propensity to pay for that kind of content. e-Books, in-app purchases (not otherwise specified) and film are the areas they most engage with. Six in 10 have bought some kind of content, but there's no single front-runner beyond film-streaming services.

The challenge of converting social news traffic into direct revenue is apparent when we consider news networkers: They are **no more likely to have paid for news content in the past month.** The gap between news and entertainment is deep.

People who pay for news content are far more likely to be paying for a range of different types, from music streaming services to digital gifts. This suggests that this is being more by changes in consumer behavior than the specifics of what that content is. In other words, the big difference lies in whether you're the inclined for pay for content or not, not whether you're particularly interested in news.

Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64.** Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 550,000 internet users aged 16-64 across 45 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this **document.**

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q4 2018 wave of research across 45 countries, with a global sample of 138,962 respondents.

Argentina	1,543
Australia	4,019
Austria	1,271
Belgium	1,279
Brazil	2,314
Canada	2,265
China	15,130
Colombia	1,473
Denmark	1,258
Egypt	1,763
France	5,095
Germany	5,135
Ghana	1,000
Hong Kong	1,821
India	7,522
Indonesia	1,747
Ireland	1,239
Italy	5,188
Japan	1,800
Kenya	1,000
Malaysia	1,535
Mexico	2,641
Morocco	1,000
Netherlands	1,300
New Zealand	1,278
Nigeria	1,000
Philippines	1,608
Poland	1,801
Portugal	1,265
Romania	1,307
Russia	2,211
Saudi Arabia	1,473
Singapore	2,737
South Africa	1,531
South Korea	1,268
Spain	5,161
Sweden	1,302
Switzerland	1,261
Taiwan	1,755
Thailand	1,492
Turkey	1,632
UAE	1,755
UK	10,201
USA	24,995
Vietnam	1,591

Notes on Methodology: Internet Penetration Rates

ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, **the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated**. This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

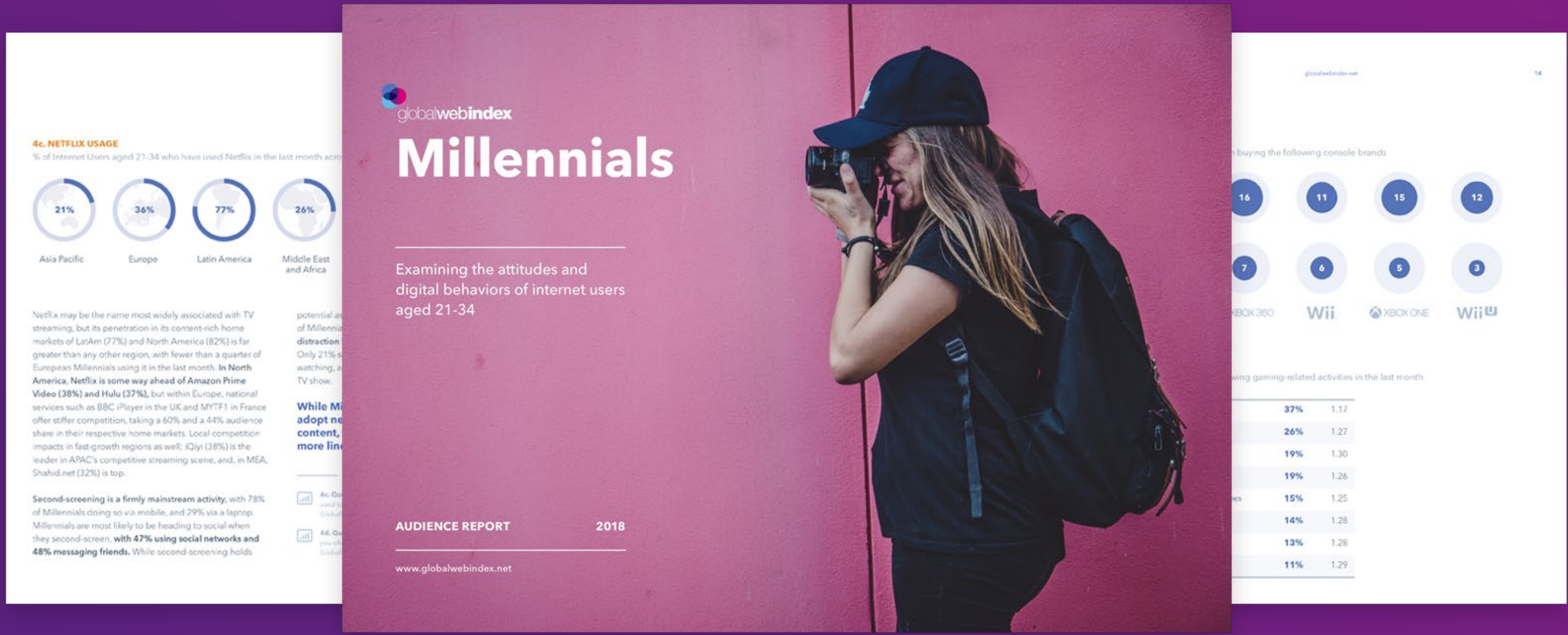
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Internet Penetration Rates

GlobalWebIndex's Forecasts for 2019 based on 2017 ITU data

Argentina	77%
Australia	90%
Austria	86%
Belgium	89%
Brazil	66%
Canada	92%
China	58%
Colombia	62%
Denmark	98%
Egypt	45%
France	88%
Germany	92%
Ghana	46%
Hong Kong	92%
India	40%
Indonesia	33%
Ireland	84%
Italy	62%
Japan	96%
Kenya	38%
Malaysia	81%
Mexico	70%
Morocco	59%
Netherlands	90%
New Zealand	92%
Nigeria	33%
Philippines	98%
Poland	61%
Portugal	77%
Romania	75%
Russia	66%
Saudi Arabia	81%
Singapore	84%
South Africa	61%
South Korea	94%
Spain	85%
Sweden	89%
Switzerland	91%
Taiwan	81%
Thailand	58%
Turkey	64%
UAE	93%
UK	96%
USA	79%
Vietnam	51%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Millennials
Examining the attitudes and digital behaviors of internet users aged 21-34
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2018
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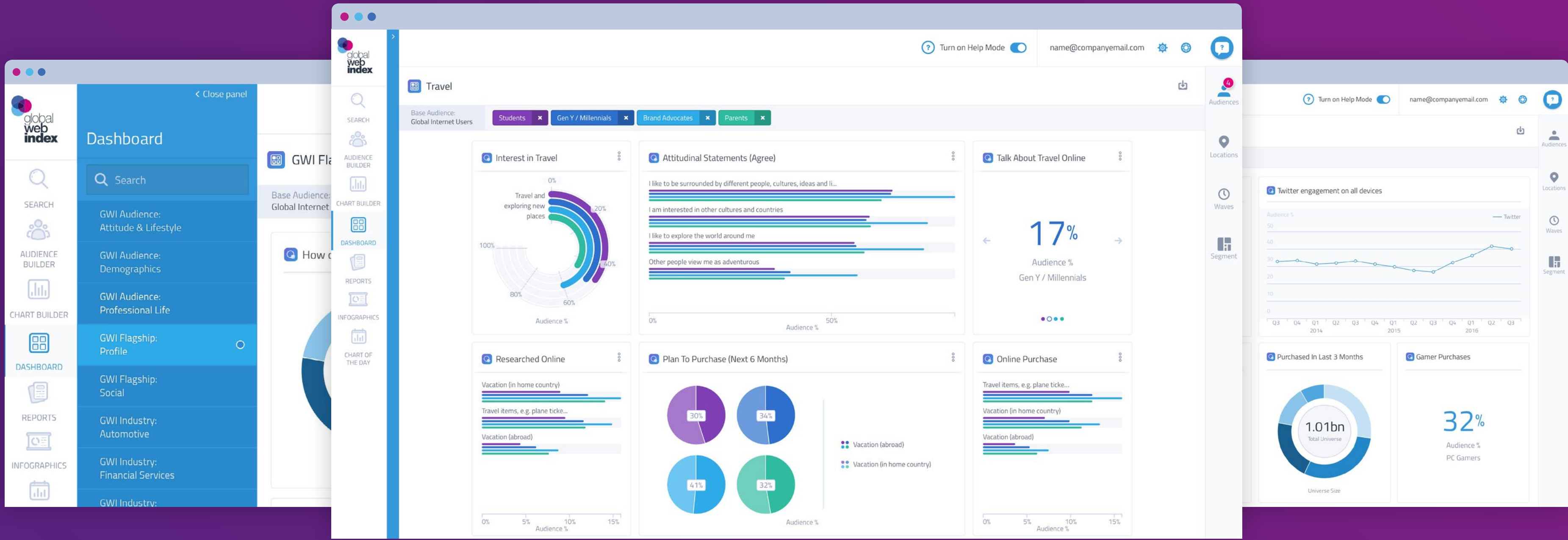

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