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More Important, But Less Robust?

Five Things Everybody Needs to Know about the Future of Journalism

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CONTENTS

Five Things Everybody Needs To Know About the Future of Journalism	4
Where We Are With Digital Media and Journalism	6
Platform Companies as New Gatekeepers	8
Search and Social lead to Diversity, Not Filter Bubbles	10
The Battle for the Public's Attention and Trust	12
A Challenging Time for the Business of News	14
News is more Diverse, and the Best Journalism is Better than Ever	16
Where we are Heading with Digital Media and Journalism	18
About the Authors	20
Acknowledgements	21
References	22

FIVE THINGS EVERYBODY NEEDS TO KNOW ABOUT THE FUTURE OF JOURNALISM

First, we have moved from a world where media organisations were gatekeepers to a world where media still create the news agenda, but platform companies control access to audiences.

Second, this move to digital media generally does not generate filter bubbles. Instead, automated serendipity and incidental exposure drive people to more and more diverse sources of information.

Third, journalism is often losing the battle for people's attention and, in some countries, for the public's trust.

Fourth, the business models that fund news are challenged, weakening professional journalism and leaving news media more vulnerable to commercial and political pressures.

Fifth, news is more diverse than ever, and the best journalism in many cases better than ever, taking on everyone from the most powerful politicians to the biggest private companies.

WHERE WE ARE WITH DIGITAL MEDIA AND JOURNALISM

Digital media have empowered people worldwide but also enabled the spread of disinformation and demagoguery and undermined the funding of professional journalism as we know it.

People increasingly rely on search engines, social media, and messaging applications, which help them access, discuss, and share news, but also risk exposing them to false or misleading information and malicious manipulation.

Recent elections in countries as diverse as Brazil, Italy, and the United States have demonstrated the continued relevance of journalism and how digital technologies empower people, but have also revealed weaknesses in our media environment, and shown how foreign and some domestic political actors seek to exploit them. Upcoming elections in the European Union, India, and elsewhere are at risk as many of the problems we face seem to evolve faster than the solutions.

The resulting digitally accelerated turbulence challenges all established institutions, from governments and political parties to private companies and NGOs, and underlines the public role and responsibility of the platform companies that increasingly own and operate the infrastructure of free expression.

In this situation, independent professional journalism will be more important than ever in helping people understand the major challenges and opportunities facing us, from day-to-day local events to global issues.

But as the business of news changes, journalism also risks becoming less robust, and ultimately incapable of helping the public make sense of our times or holding power to account.

This challenge is only compounded by increasingly open political hostility towards independent professional journalism, in the worst cases a veritable war on journalism.

Reporters without Borders noted that 2018 was 'the worst year on record' for violence against journalists, and according to Freedom House, 45% of the world's population live in countries where the media are not free.[1]

ARTICLE 19 has documented a significant decline in global freedom of expression in the last three years, including mounting problems in countries with a strong history of liberal democracy and both democratically elected politicians and authoritarian leaders using the narrative of 'fake news' to openly attack the media and close down scrutiny of their policies and actions.[2]

This combination of shifts in how people get their news and what media they use, transformations in professional journalism and the business of news, and change in the political environment that independent news media operate in poses risks that concern everybody.

In the absence of independent professional reporting providing accurate information, analysis, and interpretation, the public will increasingly rely on self-interested sources and rumours circulating online and offline, a shift that will hurt both the political process, civil society, and private enterprise.

This report identifies five things everybody needs to know about the future of journalism from research done at the Reuters Institute for the Study of Journalism at the University of Oxford. These five trends will impact the work of professional reporters as well as everybody who works with them and relies on them, from the general public to politicians, NGOs, and private enterprise.

Precise developments differ from country to country, depending on the economic, political, and social context, especially as much of the world's population is still offline and many governments do not ensure freedom of the press, but these five trends are global and cut across many of these differences.

1 https://rsf.org/en/news/rsfs-2018-round-deadly-attacks-and-abuses-against-journalists-figures-all-categories and https://freedomhouse.org/report/freedom-press/freedom-press-2017

2 https://www.article19.org/resources/article-19-report-shows-sharp-decline-in-global-freedom-of-expression-since-2014/

WE HAVE MOVED FROM A WORLD WHERE MEDIA ORGANISATIONS WERE GATEKEEPERS TO A WORLD WHERE MEDIA STILL CREATE THE NEWS AGENDA, BUT PLATFORM COMPANIES CONTROL ACCESS TO AUDIENCES

The global move to digital, mobile, and platform-operated media means that journalism is more accessible than it has ever been. In high-income countries, more than half of all media use is now digital. More than half of digital media use is in turn mobile. And much of the time we spend with digital and mobile media is spent using products and services from platform companies like Facebook and Google.

This means anyone with a smartphone and an internet connection has access to a diversity of news almost unimaginable only a few years ago. It also means that the platform companies that people rely on when navigating digital and mobile media are increasingly important for how we access and engage with news and public life.

We have moved from a world of direct discovery, where media organisations controlled both content and channels, to a world increasingly characterised by distributed discovery, where media organisations still create content, but people access it through channels provided by platform products and services like search engines, social media, and news aggregators.

In 2018, two-thirds of online news users across 37 different markets worldwide identified distributed forms of discovery as their main way of accessing and finding news online (Newman et al., 2018). Amongst those under 35, three-quarters relied primarily on distributed discovery.[3]

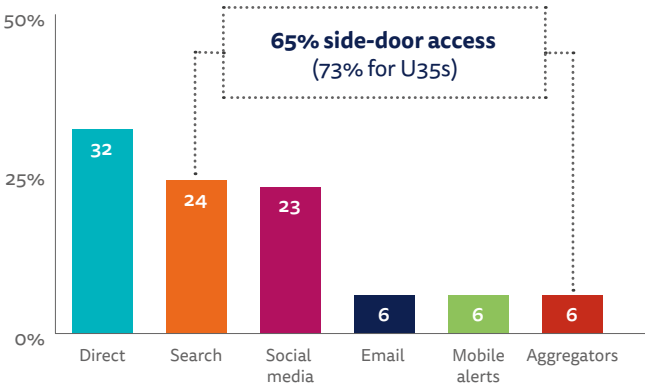
Digital media enable everyone with internet access to publish, resulting in an increasingly crowded media environment where news media increasingly compete for attention with everyone from ordinary users, more or less celebrity 'influencers', corporate communications, NGOs, social movements, and politicians.

Political parties and governments alike are actively trying to influence digital media discussions, sometimes by deliberately spreading disinformation (Bradshaw and Howard, 2018). But online discussions around, for example, elections are still heavily centred on established news media (Majó-Vázquez et al., 2017).

In this ever-more competitive battle for attention, speaking is not the same as being heard, and far from the death of gatekeepers, we have seen the move to two sets of gatekeepers, where news media organisations still create the news agenda, but platform companies increasingly control access to audiences.

Figure 1

Move to distributed discovery makes platforms gatekeepers



Q10a_new2017_rc. Which of these was the **MAIN** way in which you came across news in the last week? *Base: All/under 35s that used a gateway to online news in the last week: All markets = 69246/19755*

3 The Reuters Institute *Digital News Report* is based on nationally representative samples of adult news users with internet access, and in 2018 covered 37 markets on 5 continents with a combined population of 1.6 billion. It is the largest ongoing, international survey of news and media use in the world and we use it here to map global trends. More info at http://www.digitalnewsreport.org/

THE MOVE TO DIGITAL MEDIA GENERALLY DOES NOT GENERATE FILTER BUBBLES. INSTEAD, AUTOMATED SERENDIPITY AND INCIDENTAL EXPOSURE DRIVE PEOPLE TO MORE AND MORE DIVERSE SOURCES OF INFORMATION

While echo chambers exist, where highly motivated minorities self-select into insular news diets and like-minded communities, fears of algorithmically generated filter bubbles currently seem misplaced. While our own choices and preferences sometimes lead us to narrow information diets, technology seems to point in the opposite direction. There are opportunities here for journalists and publishers to pursue.

Empirical research thus consistently finds that search engines and a wide range of different social media including both Facebook, Twitter, and YouTube demonstrably drive people to use more different sources of news, including more diverse sources and sources they do not seek out of their own volition (Newman et al., 2018). In practice, most people only go directly to a few news sources on a routine basis, rarely more than three or four.

Distributed discovery broadens people's news diet in two ways.

First, the algorithmic ranking systems that enable search engines and social media deliver automated serendipity because they, based on a wider range of signals than simply what we have used before, lead people to more and more diverse sources of news than those they access directly (Fletcher and Nielsen, 2018).

Second, because different social media integrate news as part of a wider range of forms of content, many people are incidentally exposed to news from a wider range of sources than they access routinely while using social media to connect with others or for entertainment (Fletcher and Nielsen, 2017).

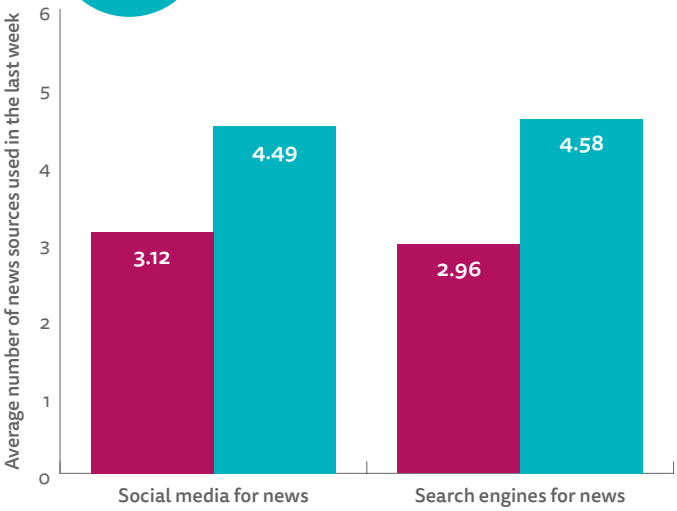
A more pressing, though often overlooked, challenge is that, as people have more and more media to choose from, their relative interest in news versus other forms of content matters more and more, leading to greater inequality between those least interested in news and those most interested, inequalities often broadly aligned with social and economic inequality (Kalogeropoulos and Nielsen, 2018).

This kind of self-selection, based on relative interest in news, is, in countries with highly polarised politics (like the United States), accompanied by partisan polarisation between left and right in news use – but this is far from a universal phenomenon (Newman et al., 2018). While the United States has a deep divide between the news preferences of people on the left and people on the right, countries in Southern Europe like Italy and Spain see more moderate polarisation, and countries like Germany and the Netherlands very little polarisation along political lines.

For most people, digital media use is thus associated with more diverse news use, but information inequality is a real risk, as is political polarisation – risks that are fundamentally rooted in political and social factors but can be amplified by technology.

Figure 2

Digital media drive people to more and more diverse sources



Q5B. Which of the following brands have you used to access news ONLINE in the last week?
Q10. Thinking about how you got news online (via computer, mobile, or any device) in the last week, which were the ways in which you came across news stories?
Base: Did not use/used social media/search engines for news: All markets = 44407/29785 41645/32546.

JOURNALISM IS OFTEN LOSING THE BATTLE FOR PEOPLE'S ATTENTION AND, IN SOME COUNTRIES, FOR THE PUBLIC'S TRUST

Digital media give us access to more and more diverse information than ever before, and in this ever more intense competition for attention, journalism is at risk of losing out.

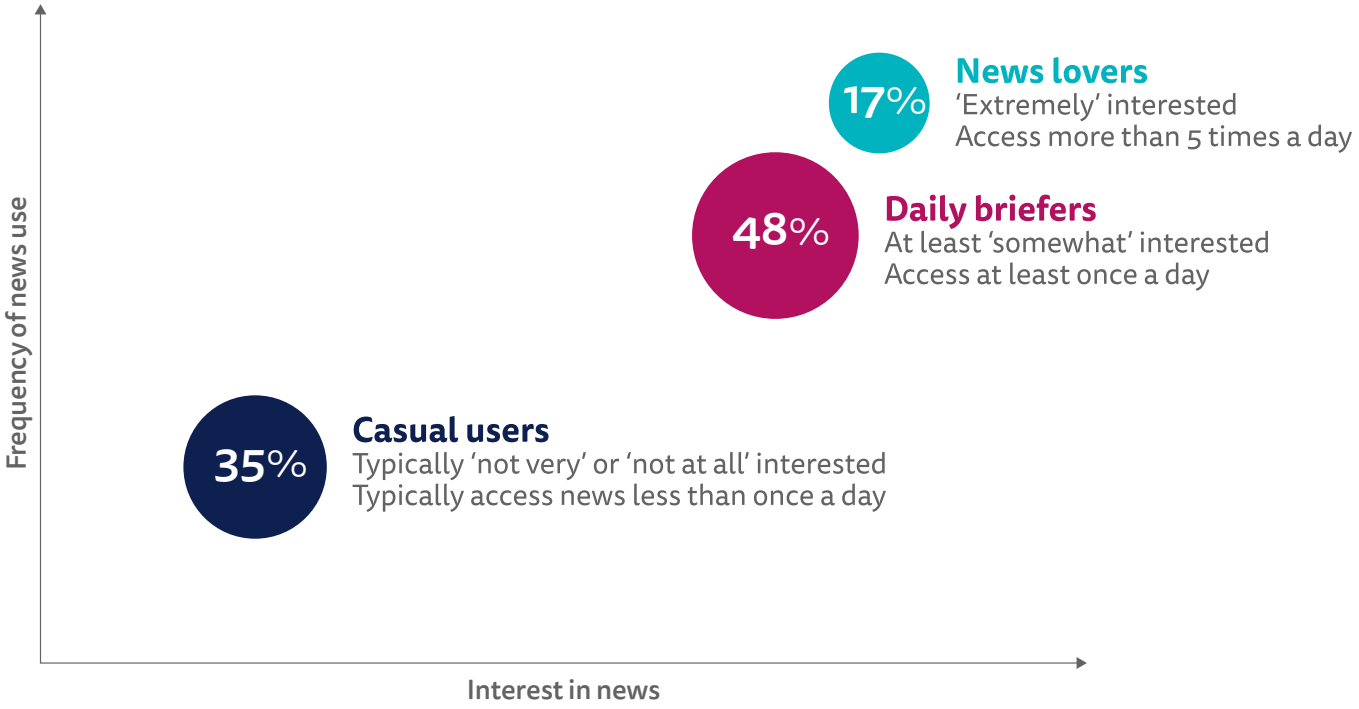
While a small minority of news lovers are extremely interested in news and access news several times a day, a clear majority of the population is much less interested, and a far greater number of people access news less than once day. Segmented on the basis of interest in news and frequency of access, we can see that news lovers make up only 17% of the public, daily briefers about half (48%) and casual users, who access news less frequently than once a day, 35%. For many people, news is only a small part of their media use. In the United States, for example, data from comScore suggests only about three percent of the time we spend online is spent with news, and just half a percent with local news.

Equally strikingly, in an era of unprecedented abundance and ease of access, journalism is facing widespread problems of 'news avoidance'. In 2017, 29% of our survey respondents globally said they often or sometimes actively seek to avoid the news (Newman et al., 2017). People turn off the news because it feels irrelevant and depressing and does not help them live their lives; they often turn to entertainment or social media instead (Toff and Nielsen, 2018).

These differences are not only a function of competition for attention. They also reflect that much of the public is questioning whether journalism is in fact helping them in their lives, and that people in many countries doubt whether they can trust the news.

Figure 3

Increasing information inequality based on interest and use



Q1b_NEW. Typically, how often do you access news? **Q1c.** How interested, if at all, would you say you are in news?
Base: Total sample across all markets. Note. Respondents who said they used news less than once a month are excluded from most of the DNR survey, but were added in to the casual users category here.

There are significant variations from group to group, and country to country, but across 37 markets we surveyed in 2018, only 44% of respondents say they trust most media most of the time, with a gap between 49% of liberals in the United States expressing trust in the news, compared to just 17% of conservatives, and ranging from a high 62% who trust the news in Finland to a low of just 25% in South Korea (Newman et al., 2018).

These issues of trust are in turn tied in with partisan political attacks on independent journalism, as well as with widespread concern in much of the world where many feel news media are unduly influenced by outside economic and political interests (Newman et al., 2017).

Trust in news is also tied in with the issue of disinformation. While digital media and platforms are clearly central to current problems of disinformation, it is important to recognise that much of the public sees these issues very differently.

They identify poor journalism and hyperpartisan political content as just as pressing information problems as false and fabricated content pushed for profit or political gain (Newman et al., 2018).

Furthermore, while current discussions tend to focus on digital media, there is little difference in self-reported exposure to various kinds of disinformation between those who mainly consume news online and those who mainly consume news offline (Newman et al., 2018).

The wider crisis of confidence between many different institutions and much of the public, with low trust in journalism, politics, and business, creates the environment in which disinformation and populist demagogues can thrive. Attacks on journalism and news media by these, as well as other political and business leaders, can in turn further undermine trust (Duyn and Collier, 2018), demonstrating how trust in journalism is dependent both on trustworthy reporting and on a political context where public officials respect independent news media.

THE BUSINESS MODELS THAT FUND NEWS ARE CHALLENGED, WEAKENING PROFESSIONAL JOURNALISM AND LEAVING NEWS MEDIA MORE VULNERABLE TO COMMERCIAL AND POLITICAL PRESSURES

The majority of professional journalism is still funded by newspapers (Nielsen, 2016). An estimated 90% of publishers' revenues worldwide still come from print, digital revenues are in many cases growing only slowly, and, where they exist, public service media are under considerable pressure (WAN-IFRA, 2018; see also Cornia et al., 2016; Sehl et al., 2016). Most of these existing forms of funding for professional journalism will decline as we continue to move to a more digital media environment, leading to further job cuts in newsrooms.

These business challenges are obvious to everyone in professional journalism and in the business of news but, strikingly, not at all obvious to the public – our research documents that 68% are either unaware of the business challenges the news industry faces or believe that most news organisations are making a profit from digital news (Newman et al., 2018).

Historically, media organisations' control of both content and channels meant they could count on advertising revenues being a large share of the business of news. As we have moved to a more digital, mobile, and platform-operated environment, advertisers are increasingly following audiences and spending their money elsewhere, especially with large technology companies offering low rates, high reach, and sophisticated targeting.

The sustainable business models for digital news developed so far are diverse and promising (including a mix of advertising, reader revenues, and non-profit approaches). But they also generally support far leaner newsrooms than those historically found in legacy media. While national politics is likely to continue to be the subject of significant coverage, many more specialised areas have seen significant cuts, as has local news (Jenkins and Nielsen, 2018).

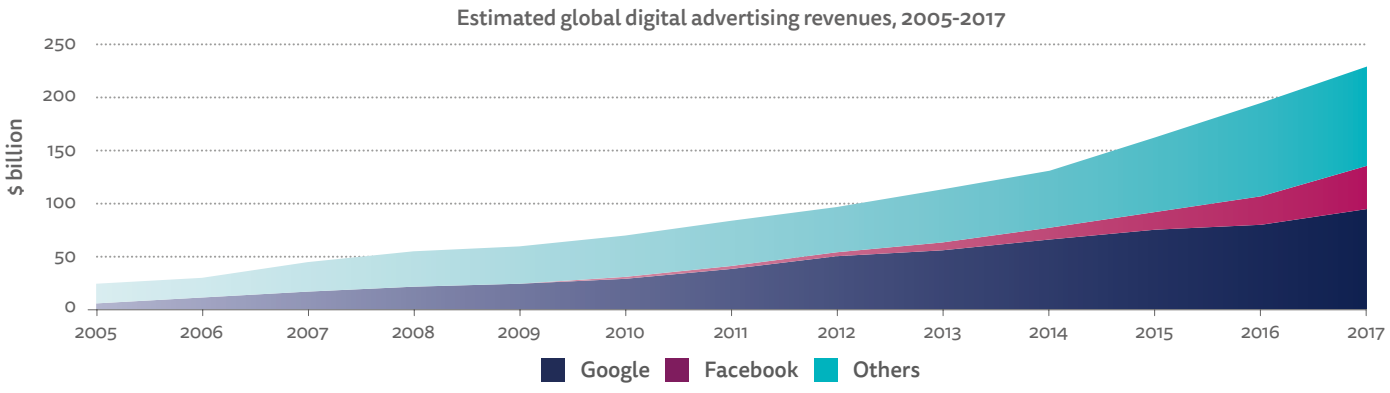
The risk here is not simply retrenchment and less coverage of many important issues, but also that a less robust business of journalism is more vulnerable to media capture by the state or politically motivated owners, and to pressure from advertisers (Nielsen, 2016).

We are already seeing governments across the world strategically using state advertising to influence news media, just as some private interests are subsidising, or sometimes acquiring, news media to advance their commercial or ideological agenda (Schiffrin, 2017).

As independent, professional journalism provides a public good, and the market alone seems unlikely to deliver this in many cases, in countries where this could be done without giving politicians or government officials direct sway over news, policy intervention could be called for to address market failures (the Nordic countries provide examples of how this could be done).

Figure 4

Advertising increasingly going to platforms, not news media



Source: Data from Ian Maude/Be Heard Group, Google, and Facebook, and estimates from Enders Analysis and eMarketer.
Note: both Google and Facebook share some of their advertising with partners through various revenue sharing arrangements.

NEWS IS MORE DIVERSE THAN EVER, AND THE BEST JOURNALISM BETTER THAN EVER, TAKING ON EVERYONE FROM THE MOST POWERFUL POLITICIANS TO THE BIGGEST PRIVATE COMPANIES

It is clear that cost-cutting, increased pressure to produce more stories across more channels/formats, and a 24/7 news cycle has led to a large volume of more superficial journalism. But the best is better than ever.

While some organisations have focused their resources and retained a commitment to accurate reporting and in-depth investigations, and recent years have seen several reminders of the power of journalistic revelations, many reporters have to produce many stories with little time, and some are left churning out clickbait from press releases and the like (Rusbridger, 2018).

Worryingly, even as many professionals working in complex organisations across business, government, and the non-profit sector specialise and know more and more about less and less, journalists are often forced to operate as generalists, and many know less and less about more and more.

At the same time, digital media have also allowed different marginalised voices to be heard and offer access to a far wider range of different sources and points of view. Journalists have embraced digital media and evolved various new formats, from deep engagement with readers over joint fact-checking work to cross-national collaborative investigative reporting, that are enabled by new technologies.

There are more examples of inspiring innovation around the world than we can cover here, but it is worth highlighting how central digital media are to many impressive new initiatives in journalism, from the German newspaper *Die Zeit's* 'Deutschland Sprichts', which matches readers with different political views for one-to-one offline discussions, and collaborative initiatives to combat disinformation through joint fact-checking and source verification like the First Draft News coordinated Crosscheck in France to cross-country international investigative journalism like the ICIJ-led Panama Papers investigation (Sambrook, 2018).

None of these projects would have been possible without digital media.

Journalism is facing stiff competition for attention and its connection with the public is threatened by news avoidance, low trust, and the perception that news does not help people live the lives they want to live.

But in many ways, the best journalism today is better than ever – more accessible, more timely, more informative, more interactive, more engaged with its audience. And the role of journalistic revelations in many different cases, in the #MeToo movement, in confronting corruption amongst public officials in countries including India, South Africa, and elsewhere, and in fuelling public debate around platform companies' power and privacy practices and other issues in the private sector, underline the continued importance of investigative reporting.

WHERE WE ARE HEADING WITH DIGITAL MEDIA AND JOURNALISM

These five trends are global and important for journalists, but also for the public that relies on journalism, and for everybody who works with journalists, from politicians and NGOs to private enterprise.

They will help define the future of journalism – more accessible as new platform products and services from augmented reality to voice assistants grow in importance to supplement search engines and social media; less robust as old business models built in twentieth-century media environments erode in twenty-first-century environments; more important than ever as we face complex global problems and the risks of unaccountable exercise of public or private power.

At its best, independent professional journalism can inform the public, help counter disinformation, contain populist demagogues, and help hold both public and private power to account. But a dearth of accurate, relevant, and unbiased reporting risks undermining trust in institutions, the political processes, and informed decision-making, and allows corruption and abuse of power to flourish.

That means strong journalism is essential for both the public good, politics, and private enterprise – it can help ensure that the rise of digital media and our current turbulence results not in chaos, but in change for the better.

To ensure this, journalists and news media need to continue to adapt to the digital media that people all around the world are eagerly embracing at the expense of print and broadcast, and build a profession and a business fit for the future. And we need collectively to protect journalists' right to report and freedom of the media, in recognition that, at its best, independent professional journalism creates public value, and serves the public.

ABOUT THE AUTHORS

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