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World Association of Newspapers and News Publishers

Press Release

World Association of Newspapers and News Publishers

New Study: Surveillance, national security legislation and data retention laws threaten the sustainability of investigative journalism around the world

FOR IMMEDIATE RELEASE - Paris, Frankfurt, 1 May 2017

NEW STUDY: Surveillance, national security legislation and data retention laws threaten the sustainability of investigative journalism around the world

Protecting Journalism Sources in the Digital Age is a new global study produced by WAN-IFRA for UNESCO that examines the growing risks confronting forms of journalism dependent upon confidential sources and whistleblowers. It finds that the legal frameworks that support protection of journalistic sources, at international, regional and country levels, are under significant strain - a development that is seen to represent a direct challenge to the established universal human rights of freedom of expression and privacy, and one that, if not addressed, is likely to cause a threat to the sustainability of investigative journalism.

The study, authored by former World Editors Forum/WAN-IFRA Research fellow Jake Presidio, covers 121 UNESCO Member States and represents a benchmarking of journalistic source protection in the Digital Age. It will be launched on World Press Freedom Day (May 3rd) during celebrations in Jakarta.

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Gambia: Media freedom threatened by directive

GAMBIA On 12 April, the Gambia Press Union (GAMPU) called on the government to rescind Directive 180 on the journalism profession. Under this directive, journalists are required to register with the Ministry of Culture, Information and Tourism, and journalists and/or their publications will be identified with the registration number.

The directive also requires journalists to declare a source of income. Failure to comply may lead to a fine or imprisonment. The directive is a violation of the Basic Law of the Gambia, which guarantees the right to freedom of expression.

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Press Release
OUR CONVERSATION TODAY

Trust is the New Currency

Shift to Loyalty Community

Push-back against ad tech & the Duopoly

@newspaperworld

@vincentpeyregne
Global newspaper revenue
2012 - 2016

Source: WPT Analysis, E&Y, Zenith, PwC Global Entertainment and Media Outlook: 2016-2020
Digital Journalism – Waves of Disruption

1. **Portals**
   1990-1997
   - America Online
   - MSN
   - Yahoo!

2. **Search**
   1997-2006
   - The Huffington Post
   - Boston.com
   - SFGate.com

3. **Social**
   2006-2015
   - BuzzFeed
   - Taboola
   - Outbrain
   - Upworthy
STORIES AS A SERVICE
Trust

ATTENTION is the OLD currency
TRUST is the NEW ONE
Total Facebook Engagements in the US for Top 20 Election Stories

*Engagement refers to the total number of shares, reactions and comments for a piece of content on Facebook.
Source: Facebook data via BuzzSumo
Buhari & APC’s campaign promises: Appraising 9 pledges 2 years on

Two years ago Nigeria’s President Muhammadu Buhari and his All Progressive Congress government assumed office on the back of promises of change. Are they being met halfway into the president’s tenure?

12:35 | 30th May 2017 (GMT)

Are 70% of Kenyans who can work jobless? Union chief mangles numbers

Unemployment remains a challenge to most African governments. Kenya’s no less, but debating solutions should rest on accurate information.

02:56 | 26th May 2017 (GMT)
“Residents of Hong Kong funded FactWire — because they think good information is indispensable to survive as citizens. They know that if they support quality, well-verified stories, they will know what is really going on, and they will not be deceived with slanted or special-interest driven information.”

March 4, 2016 - Global Investigative Journalism Network

“FactWire is being backed by the largest crowdfunding campaign ever seen in Hong Kong, becoming the latest player to emerge in the media industry in recent months.”

Aug 21, 2015 - South China Morning Post
Traditional media shows steepest decline in trust
Percent trust in each source for general news and information

Source: Edelman Trust Barometer 2017. 33,000 respondents total, 28 countries
2016
The inversion of influence

Influence

Authority

Authority + Influence

85% of population
Trust index: 48

12 pt Gap

15% of population
Trust index: 60

Informed public

Mass population

Source: Edelman Trust Barometer 2017
2017
Trust gap widens
Mass population rejects “established authority”

Authority + Influence

Mass population has now influence and authority

Establishment left empty handed

Source: Edelman Trust Barometer 2017
MAKE OUR NEWS GREAT AGAIN
Collaborations = scale

Scale = control of customer relationships
Global newspaper digital circulation revenues 2012/2016

Source: PwC Global Entertainment & Media Outlook: 2016-2020
### Snapshot of Digital Subscription Success Stories

<table>
<thead>
<tr>
<th>Title</th>
<th>Digital Only Subs</th>
<th>% Subs that are pure digital versus total daily circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>NYT</td>
<td>1,600,000 +</td>
<td>69%</td>
</tr>
<tr>
<td>The Times</td>
<td>185,000 +</td>
<td>44%</td>
</tr>
<tr>
<td>Süddeutsche Zeitung</td>
<td>40,000 +</td>
<td>13%</td>
</tr>
<tr>
<td>Aftenposten, regionals incl</td>
<td>110,000 +</td>
<td>38%</td>
</tr>
<tr>
<td>Le Figaro</td>
<td>60,000</td>
<td>20%</td>
</tr>
<tr>
<td>El Mundo</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FT</td>
<td>566,000 +</td>
<td>75%</td>
</tr>
<tr>
<td>WSJ</td>
<td>1,000,000 +</td>
<td>50%</td>
</tr>
<tr>
<td>FAZ</td>
<td>40,000 +</td>
<td>20%</td>
</tr>
<tr>
<td>Les Echos</td>
<td>31,000 +</td>
<td>33%</td>
</tr>
<tr>
<td>The Economist</td>
<td>303,500 +</td>
<td>29%</td>
</tr>
<tr>
<td>Boston Globe</td>
<td>80,000 +</td>
<td>29%</td>
</tr>
<tr>
<td>Schwäbishe Zeitung</td>
<td>15,000 +</td>
<td>10%</td>
</tr>
<tr>
<td>Amedia (entire group 62 titles)</td>
<td>110,000 +</td>
<td>23%</td>
</tr>
<tr>
<td>Sud Ouest</td>
<td>14,000 +</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: WAN-IFRA Global Advisory
“NEWS NEEDS TO BE A BUSINESS THAT BUILDS VALUE FOR THE COMMUNITIES IT SERVES AND SUSTAINS ITSELF AS A RESULT OF THAT VALUE.”

- Jeff Jarvis
Global newspaper traditional revenue sources 2012/2017

CAGR - 2%

Source: WPT Analysis, ZenithOptimedia and PwC Global Entertainment and Media Outlook: 2016-2020
Global newspaper digital revenues 2012/2017

CAGR + 16.5 %

Source: WPT Analysis, ZenithOptimedia and PwC Global Entertainment and Media Outlook: 2016-2020
Who pays for news, and why do people subscribe?

- 53% of adults pay for news
- 52% of those who do not subscribe are "news seekers"

Coverage of a specific topic is the **No. 1 reason** people start subscribing

- 26% who use a source for free might begin to pay for it
- 52% of payers subscribe to newspapers

- 53% of **digital subscribers** have never paid for a print version of that outlet

Source: American Press Institute
Younger generation is willing to pay

Age distribution for new subscription sales per project
Schibsted Norwegian subscription papers

Source: Schibsted Norway
Loyalty vs. pageviews

Source: WAN-IFRA World Press Trends, Chartbeat
ADVERTISING

PUSH-BACK AGAINST AD TECH & THE DUOPOLY

ILLUSTRATION HANNE BERKAAK, BYHANDS FOR TINIUS TRUST
Total Average Revenue by Platform

H1 2016, $, N=17 Publishers

Source: DCN Distributed Content Revenue Benchmark Report, January 2017
Winners of the attention economy aggregate largest audiences & capture most of ad revenue

64% combined share

89% their share in new ad spend

Source: WAN-IFRA
Who else captures $ in digital ad ecosystem?

Source: AEMII – Future Media Lab / European Magazine Media Association 2016
+30% GLOBAL INCREASE

62% ON MOBILE

Source: PageFair 2017 Ad Block Report
Ad Collaboration

Selling National Content at Scale

Intent

National Content

ID

Ad sales based on search

Ad sales based on audience
Publishers are looking at **new revenue sources**

_total company revenue/income from non-traditional media activities (content sales and advertising)_

US **Programmatic** Digital Display Ad Spending 2015-2019

Source: eMarketer, April 2017
Share of **Native Ads**
In US Display Digital Ad Revenue
2015-2021

Note: Display includes all banner, rich media, sponsorships and video ads

Source: BI Intelligence estimates based on historical data from the Interactive Advertising Bureau and PricewaterhouseCoopers, and IHS
In Summary

Seize the opportunity to build business need for trusted journalism

Focus on the right metrics: loyalty & community

There are ad opportunities for publishers in collaborations and trusted environments
World News Media Outlook 2017

Executive Summary

(Q11) Map of respondents

Source:
World News Media Outlook 2017 - Innovation Research Group & WAN-IFRA

(Q2) Breakdown of respondents by job role

Source:
World News Media Outlook 2017 - Innovation Research Group & WAN-IFRA
Successful Organisations* consider the following to be high priorities over the next 5 years:

- Events and conferences
- Podcasting / Streaming audio
- Special reports
- Web TV / Video

*Successful Organisations are both reporting financial growth and are seen to be innovative by their executives.
Booming firms (who report overall revenues up of more than 10%) are more likely to invest in:

- Paid-for content websites
- Paid-for mobile phone services
- E-Commerce
What is the Greatest Risk to your Company’s Future Success?

- Reluctance to innovate: 26%
- New revenue / Business model: 24%
- Competition / Business environment: 15%
- Political instability: 12%
- Consumers: 8%
- Leadership: 8%
- Google & Facebook: 5%

DETAILS OF WORLD PRESS TRENDS are available on www.wptdatabase.org

Thank you very much!

www.wptdatabase.org