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**News consumption and provision transformed -
the implications for plurality**

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About the author

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1. Introduction

Securing media plurality has been an objective of legislation around the world. While there are ancillary cultural goals, at heart the reason for seeking plurality has been to safeguard democratic discourse.

The House of Lords Communications Committee summarised the thinking behind the UK's plurality legislation¹ as follows:

“In 2001, the Government published a consultation paper on media ownership in which it was stated that “A healthy democracy depends on a culture of dissent and argument, which would inevitably be diminished if there were only a limited number of providers of news”. This was a sentiment shared by the previous Conservative administration “A free and diverse media are an indispensable part of the democratic process. They provide the multiplicity of voices and opinions that informs the public, influences opinion, and engenders political debate. They promote the culture of dissent which any healthy democracy must have. If one voice becomes too powerful, this process is placed in jeopardy and democracy is damaged”.²

It is clear from this that plurality as measured by number of media owners is a means to an end – it does not have value in of itself, but rather, through intermediary steps (critically a multiplicity of voices), is seen to support the healthy functioning of democracy.

Indeed, ownership plurality is a blunt instrument and not guaranteed to deliver this outcome. For instance, a press with many owners but where all titles happened to take the same political perspective would do little to support a ‘culture of dissent and argument’. Thus ownership plurality is not sufficient to guarantee these outcomes.

Nor is it necessary. The news media as a whole might be closely held, but if each owner owned multiple titles with highly distinct stances this could easily be just as effective in supporting democracy as a more diversely held media. Equally, closely held titles which presented conflicting views within each of their editorial pages, did not push a particular news agenda and so on might be preferable to a more widely but more dogmatic press. This kind of ‘internal’ plurality is a crucial part of the picture.

This is not to argue that plurality of ownership is irrelevant – it certainly is not – but rather to emphasise that it is a ‘proxy’ objective, sought for its likely (but not certain) consequences. In essence, the desirability of legislating for plurality implicitly depends on the assumption of a ‘chain of

¹ Communications Act 2003

² House Of Lords Select Committee on Communications, [The ownership of the news](#), 27 June 2008

influence'. In this chain, the opinions of owners or proprietors may influence the output of the media outlets they own. This output in turn influences the knowledge and opinions of the members of the audience, which is particularly relevant when they are acting as citizens engaged in the democratic process and political debate.



We do not suggest that this 'chain of influence' is a complete picture of the interactions of all relevant parties, but we believe it lies at the heart of the debate on plurality.

In practice none of the links in this chain are solid and static. The degree of linkage can wax or wane. But we nevertheless believe that in several places this chain is in fact becoming weaker. Critical links are far less strong than they once were. Consequently the impact on the democratic process at the right end of the chain is significantly less dependent on the state of ownership at the left end of the chain. By extension this would suggest that 'owner focused' regulation (such as plurality) is less likely to make a meaningful difference to the ultimate objective of a healthy democracy than it once was.

This paper sets out developments in the market, and their impact on the links in the chain above. We start with the citizen/consumer and 'work backwards' to the proprietor. In particular we find that:

- Citizens are increasingly sophisticated news consumers, taking a healthily sceptical view and drawing on multiple sources – this inevitably reduces the influence of content from any one provider
- That content itself is ever more subject to a range of influences quite separate from proprietors and editors. These influences include the consumers themselves (via the internet) and increasing financial pressure. This dilutes the influence of proprietors

2. Increasing sophistication of news consumption

Since the 2003 Communications Act, news consumption has changed significantly. The internet (and to a lesser extent the wider availability of multichannel TV) has enabled far greater multisourcing of news, both from traditional and new sources. This has led to more sophisticated, sceptical consumption. In this section we outline these trends.

The rise of the internet as a news source

What media citizens favour for news has changed dramatically. In 2004, according to Ofcom, 15% of consumers cited newspapers as their main source of UK news. By last year this figure had fallen to 6%. At the same time, those citing the internet as their main source had risen to 7%, overtaking newspapers (Figure 2).

This reported preference is confirmed by data on online news usage. At the time of the Communications Act broadband penetration was 13%. Today it is 74%.⁵ Further, those with access to online services are ever more likely to use the internet for news – according to the Oxford Internet Survey 79% do. (Indeed, of the information types tracked by the OxiS, it was the fastest growing since their previous survey in 2009). ComScore, using technical measurement, reports an even higher figure, with 92% of those online visiting a news site at least monthly.⁶ While Comscore does not report how many of these are using news sites every day, we know the daily traffic of individual sites is substantial. The *Guardian* has 1.3m daily UK visitors online (higher than its daily print readership) and the *Mail* has 2.0m.⁷ Daily figures for the BBC are not available, but bbc.co.uk has 20m visitors per

Figure 2 “Main source of UK news” for consumers³

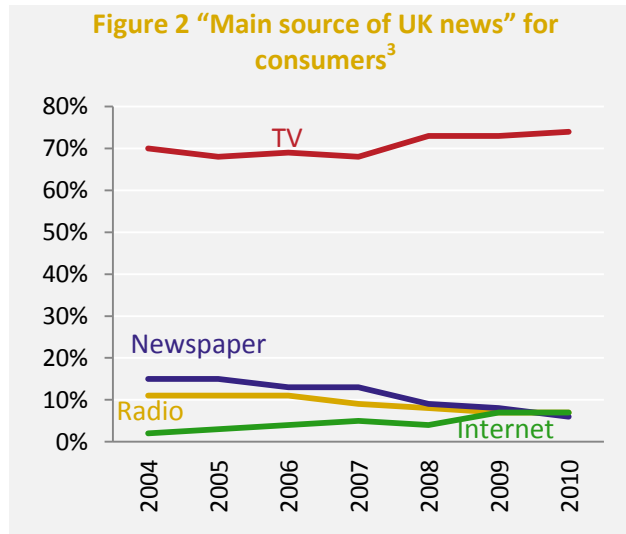
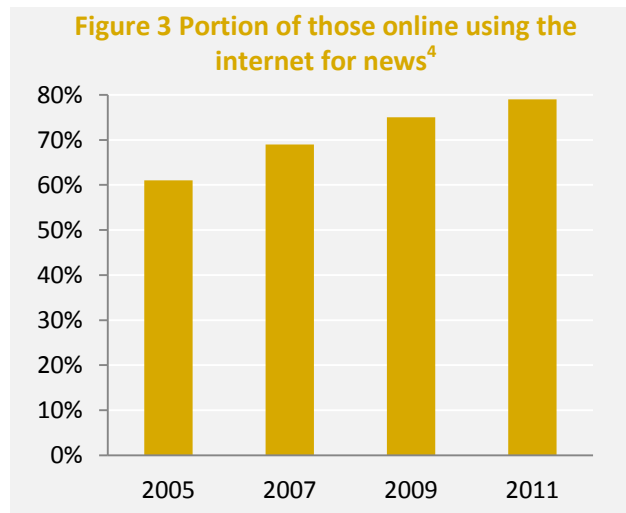


Figure 3 Portion of those online using the internet for news⁴



³ Ofcom, [The Ofcom Media Tracker survey: 2010 survey results](#), July 2011 and Ofcom, [Report to the Secretary of State \(Culture, Media and Sport\) on the Media Ownership Rules](#), 17 November 2009

⁴ Oxford Internet Institute, [Next Generation Users: The Internet in Britain](#), October 2011

⁵ Ofcom, ONS

⁶ Comscore, November 2011. Sites in 'News and Information' category (primarily news sites with some others such as weather)

⁷ [ABC](#), December 2011

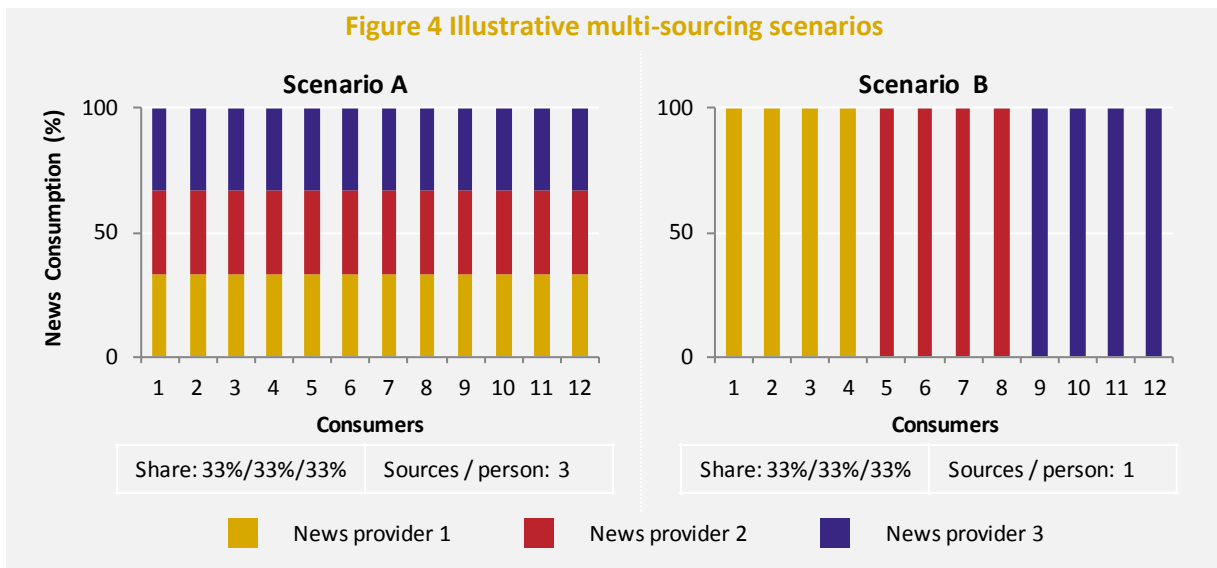
week.⁸ The combination of more people online, and those online using news more means that online news has expanded very rapidly.

As we will see, this shift from print to online is far more important than a simple shift from paper to a screen – it has wrought fundamental changes in how citizens consume news.

The rise of multi-sourcing

One critical change has been the rise of multisourcing – the consumption of news from multiple outlets. When citizens multisource their news, they can hear diverse voices, cross check and make up their own mind. Moreover, multisourcing significantly inoculates audiences against the possibility of one media organisation burying an important story. As we will see, the vast majority of consumers do in fact multisource, to a substantial and increasing extent.

It is an important practical point that an undue focus on market share in assessing plurality can completely miss the degree of multisourcing in a market. Consider Figure 4:



In both scenarios, the market share of the three news providers is one third each. However, in Scenario A, each consumer hears from three different news sources. In Scenario B, each consumer hears from one only. For this reason, though the scenarios are indistinguishable by a market share metric, it is undoubtedly the case that Scenario A is healthier for society.

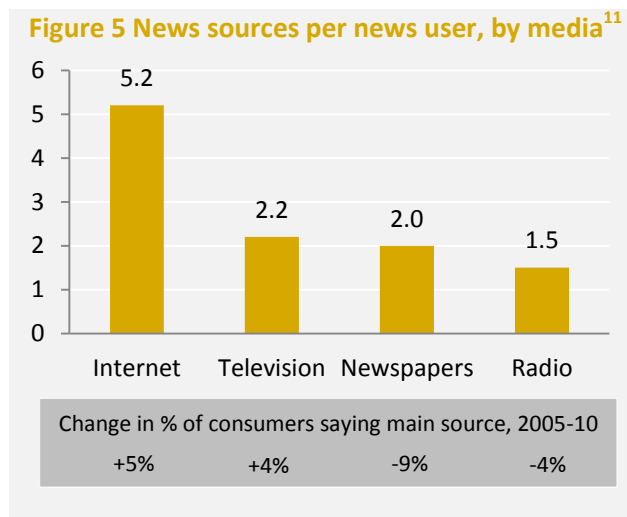
This is much more than a theoretical issue, since most consumers do in fact multisource (and as we will see, do so deliberately). Ofcom research⁹ in

⁸ Note that the daily figure cannot be estimated by dividing the weekly figure by seven, since many users are likely to visit several times per week. Weekly figure from BBC, [Annual Report and Accounts 2010/11 : BBC Executive's review and assessment](#)

2010 found that the typical news consumer takes news from 2.8 news providers¹⁰, and only 19% rely on a single source (primarily the BBC). Just 1% of news consumers consume only News Corp titles.

Thus multisourcing is today the dominant mode of news consumption. Moreover it is almost certainly increasing, not least because of the internet. This matters for multisourcing because online news consumption is inherently more ‘promiscuous’ than offline consumption.

Those using news online consume news from 5.2 sources. This compares to newspapers, where the average newspaper reader sees 2.0 titles (national and local). As Figure 5 also shows, consumers are shifting their news consumption from media with lower multi-sourcing (such as radio and newspapers) to media with higher multi-sourcing (the internet and, to a lesser extent, TV). This is not to suggest that the purpose of consumers’ move online was to multisource, but it certainly has been a consequence.¹²



There are numerous reasons for high levels of multi-sourcing online, including:

- It is (generally) free to use news from multiple sources, encouraging sampling and diverse consumption
- Social media points users to news stories, encouraging use of outlets they might not normally default to. According to the Bureau of Investigative Journalism:

“Social media is of increasing importance for the dissemination of news, and allows people who would never normally read a particular newspaper to be aware of its journalism by recommendations by people they are connected to via social media sites”¹³

⁹ Ofcom, [Report on public interest test on the proposed acquisition of British Sky Broadcasting Group plc by News Corporation](#), 31 December 2010 [¶4.19]

¹⁰ For a variety of reasons, some related to the inherent limitations of consumer research, and some related to the specific design of Ofcom’s research, this is almost certainly an underestimate. News providers here means organisations, so reading both the *Times* and the *Sun* (for example) would count as one provider

¹¹ Level of multisourcing from PaidContent.org, [Research: Internet Is UK’s No. 2 News Source, But Only 3.8 Percent Pay](#), 28 December 2011

¹² O&O have also reported broadly similar figures for multisourcing – see Paidcontent.org, [Research: Internet Is UK’s No. 2 News Source, But Only 3.8 Percent Pay](#), 28 December 2011

¹³ In: House of Lords Select Committee on Communications, [Inquiry into the future of investigative journalism - Oral and written evidence](#), 12 September 2011

- Users search for stories about a particular topic and may select by - say - relevance or immediacy, rather than going to a familiar outlet. (Those using search as their main way to look for information online has risen from 20% to 61% since 2005)¹⁴
- Users can access specialist titles for a particular topic which might not have been available offline. For example, the *New York Times* is an important online news source for those in the UK, perhaps for its US coverage (though of course it also covers UK stories)
- Aggregators such as Google News introduce unfamiliar or less used outlets. (Google News has a UK reach of 1.4m¹⁵, and in the course of a typical month links to over 350 different news sites from its front page¹⁶).

Cross-checking of news sources online

As we have noted, multi-sourcing enables (indeed implies) cross checking of stories and news agendas. This cross-checking of stories is not merely a happy by-product of online consumption – it appears to be a deliberate habit of many consumers. According to a 2010 Mintel survey of online news consumers, 51% said they agreed they “often check more than one source to confirm news stories I’ve read”.¹⁷ Mintel go on to highlight that this has been enabled by changes in the market, not least the possibility to hear directly from the source of the story:

“With the variety of written and broadcast media channels providing news, including the internet, this is now much more possible than it was five or ten years ago, so that people can check other media sources but can also go direct to the subject of the news itself because it will often have a website.”

(As Mintel notes, the ability to cross check and multisource is not limited to the internet – there also has been an expansion of TV choices. In 2003 the average household had 7.6 channels with news available, today it has 12.1, driven by channel launches and adoption of digital TV).¹⁸

Natalie Fenton of the Goldsmiths Leverhulme Media Research Centre also highlights the ability of consumers to cross check:

¹⁴ Oxford Internet Institute, *Next Generation Users: The Internet in Britain*, October 2011

¹⁵ UKOM, *Monthly Online Audiences Summary*, December 2011

¹⁶ Newsknife.com

¹⁷ Mintel, *Consumer Perceptions of News Media*, September 2010

¹⁸ Perspective analysis

“The internet provides a space where interested readers can check the validity of one news report against another and even access the news sources referred to.”¹⁹

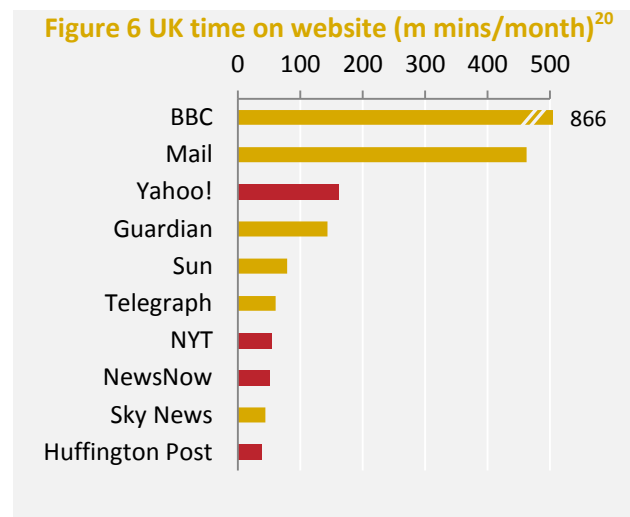
Thus today news consumers are accessing multiple sources, and consciously cross-checking them. This clearly is reducing the extent to which any one organisation can influence citizens’ outlook.

Different sources of news online

Some have argued that the importance of online news consumption is limited because it is simply another distribution channel for existing media. However, this line of argument misses a number of points. The first of these is multi-sourcing, as discussed above. Even if all that the internet did was enable multisourcing of exactly the same sources, this would have real value.

Secondly, online share is very different. For instance, UK internet users spend almost twice as much time on the *Guardian* website as on the *Sun*’s, whereas the *Guardian*’s print circulation is one tenth that of the *Sun*.

Thirdly, online news is *not* simply the traditional news sources (though they are certainly important). The top ten national news sites in Comscore’s news and information category include four ‘non traditional’ news sources for the UK – three online-only properties, and the New York Times. In addition, there is a long tail of lesser-known non-traditional sites serving various niches which individually are small, but in aggregate are important. Such sites contribute one quarter of the time spent online within Comscore’s news and information category.²¹ Clearly this represents a dilution of influence for traditional media owners (and is therefore an important contribution to plurality).



The ability of non-media organisations to reach citizens directly

A further change wrought by the internet is that citizens can now hear directly from the subjects of news stories, diluting the influence of all media, new or old.

¹⁹ N. Fenton (ed), *New Media, Old News*, 2010

²⁰ Comscore, November 2011

²¹ Perspective analysis of Comscore, November 2011. Includes online-only and non-UK sites

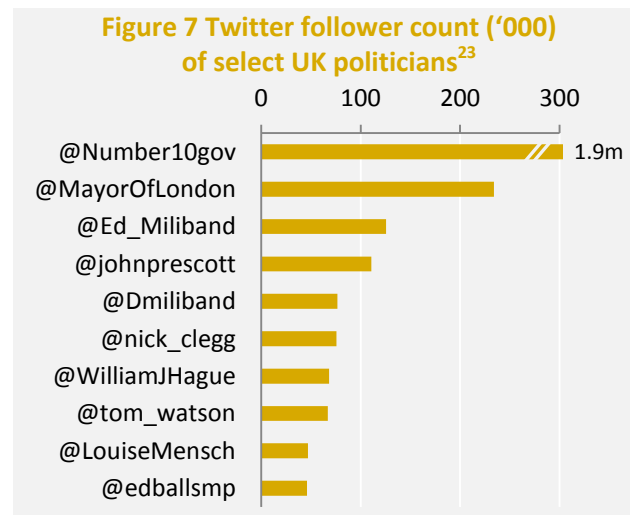
Before the internet, organisations and individuals had very limited options to reach a mass audience other than via the media. They could buy advertising or direct mail, but this is expensive and not a practical regular option for many. The internet has transformed this. Politicians, government departments, companies, charities and many other institutions can speak directly to relevant audiences.

This can be via direct emails, blogs, websites, Twitter, Facebook, YouTube or other means – each is suited for different purposes. The critical point is that each enables the disintermediation of the mass media.

This has a two-fold impact. It lessens the extent to which such organisations are beholden to the media, and it dilutes the influence of media. If citizens can hear directly from a particular politician (say), this presents an alternative view to that which may be being painted by the media. Neither view is necessarily inherently more accurate, but the critical point is that the audience has more view points on which to base their own judgement. Moreover, the audience well understands this. As we have seen, many report actively cross-checking, and according to the Mintel survey, 66% agree that “[t]he internet means that it is easier to access news directly from its source (eg via websites, Twitter feeds etc)”²²

Twitter

Consider the Twitter accounts of just ten politicians. The group shown in Figure 7 has a total follower count of 2.7m. (The total for all MPs and leading politicians will be appreciably higher). There will undoubtedly be some duplication within this, with some individuals following more than one of these politicians, but this is substantial reach. Compare, for instance, to the readership of the Telegraph (the best selling broadsheet) at 1.6m.²⁴ Moreover, Twitter will allow these politicians to communicate with their followers in real time, multiple times per day. As we have noted, Twitter is just one means of internet communication open to them, in addition to email, websites and so on.



Of course, Twitter is not limited to politicians. Organisations as diverse as Oxfam, British Airways and Tottenham Hotspur all have over 100,000 Twitter followers. Celebrities can have massive followings –almost 19m

²² Mintel, *ibid*

²³ [Twitter](#), follower count as of 1 February 2012. Ten leading accounts, though not necessarily the ten largest

²⁴ [NRS](#), October 2010-September 2011

follow Lady Gaga for instance.²⁵ All can use Twitter to initiate stories or as a form of right-of-reply to media reports they disagree with.

Figure 8 Sample organisations and individuals with Twitter accounts²⁶

Institutions	World Leaders	Companies
White House	Barack Obama	Royal Dutch Shell
NASA	Hugo Chavez	BP
World Econ Forum	Newt Gingrich	Boeing
UNICEF	Dmitri Medvedev	Pfizer
American Red Cross	Mitt Romney	GE
World Bank	Julia Gillard	Unilever
The Vatican	Elysee Palace	Vodafone
Royal Academy	Herman Van Rompuy	Rio Tinto
UK MoD	Benjamin Netanyahu	HSBC
Bank of England	Lucas Papademos	GlaxoSmithKline

This is not to argue that everything on Twitter should be regarded as carrying the credibility and impact of a lead editorial in the *Times* or the BBC's 10pm bulletin – on the contrary, much of what is on Twitter is down at the level of pub banter. But the key point is that Twitter is a communications tool, not an editorial outlet. Credibility (or lack thereof) accrues not from the service, but from the person making the statement. This is a point well understood by Twitter users, who have different levels of trust even for individuals and their employers. For instance, they are 55% more likely to trust the Twitter feed of Jon Snow (Channel 4 news presenter) than that of Channel 4.²⁷

Twitter is no more inherently trustworthy than a letter, but the existence of junk mail does not invalidate the bank statement. Equally, Twitter trivialities do not invalidate (or reduce the impact) of, say, Jemima Khan's tweet denying false rumours of an affair.²⁸

Indeed, the media themselves take Twitter (or rather some of the individuals on it) to be credible and important. According to Steve Hermann, editor of the BBC News website, "it is taken as read for anybody working in newsgathering that Twitter is a key source that you need to be across."²⁹ Anthony de Rosa, Social Media Editor at Reuters, says:

"To bury our head in the sand and act like Twitter (and who knows what else comes into existence next month or five years from now?)

²⁵ The majority of these followers will likely be outside the UK

²⁶ [Twitter](#). Each category ranked by followers

²⁷ YouGov, [Public Broadcasting Service \(PBS\) UK Trust Report](#), 14 November 2011

²⁸ Jemima Khan, [tweet](#), 8 May 2011

²⁹ Nic Newman (Reuters Institute for the Study of Journalism), [Mainstream Media and the Distribution of News](#), September 2011

isn't increasingly becoming the source of what informs people in real-time is ridiculous".³⁰

As a practical example of how significant the media now regards Twitter to be, in the 24 hours to 3pm, 11 February, there were 17,900 *new* UK news pages mentioning Twitter.³² In addition to general reporting based on Twitter, the media are also extremely active themselves on Twitter. The BBC alone lists 1,163 Twitter accounts for different BBC news feeds, correspondents, staff and programmes.³³ The *Financial Times* lists 220.³⁴ Numerous journalists and columnists have personal significant twitter followings (see Figure 9).

Twitter is just one online tool that organisations and individuals are using to communicate with each other (albeit an important and rapidly growing one). For more extensive commentary, blogs tend to be the tool of choice.

Blogs

There is limited aggregated data for blogs, but one single provider, Wordpress, hosts over 71m blogs (globally)³⁶ attracting approximately 400,000 UK visitors per day³⁷. Tumblr, another blogging service, has 44m blogs³⁸ with 300,000 UK visitors per day.³⁹ These blogs cover a wide range of topics from the profound to the trivial (not unlike newspapers).

Amongst them are a number of blogs focused purely on UK politics (though of course these are not the only blogs offering political comment). TotalPolitics tracks over 1000 of them just for England.⁴⁰ Some are national in their focus, some regional. Many

Figure 9 Twitter follower count ('000) of select UK media figures³¹

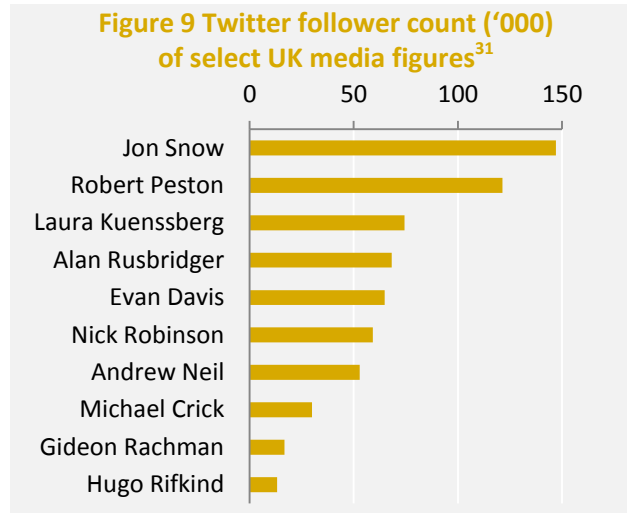
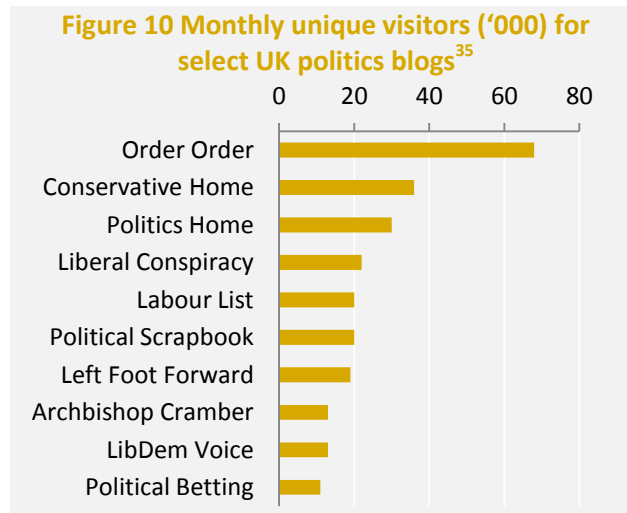


Figure 10 Monthly unique visitors ('000) for select UK politics blogs³⁵



³⁰ Quoted in BBC, [Associated Press reporters told off for tweeting](#), 17 November 2011,

³¹ [Twitter](#), follower count as of 1 February 2012. Ten leading accounts, though not necessarily the ten largest

³² Google News, pages from the UK

³³ Twitter [BBC Lists](#)

³⁴ Twitter [FT Lists](#)

³⁵ Google Ad Planner

³⁶ [Wordpress website](#)

³⁷ Google Ad Planner

³⁸ [Tumblr website](#)

³⁹ Google Ad Planner

⁴⁰ TotalPolitics [Blog Directory](#)

are highly partisan. Any one may have a small voice, but in aggregate they are more significant. The ten sample political blogs shown in Figure 10 reach 180,000 people in the UK each month. While this is small relative to the *total* audience of a typical newspaper website, it is likely more significant when compared to the usage of hardcore political content on a given newspaper site, which is the more relevant comparison. (To compare to the full traffic of a given newspaper, we would also need to include sports blogs, celebrity blogs and so on).

Even quite obscure subjects can receive substantial coverage via blogs. There have for instance been over 6,000 blog posts on ‘media plurality’.⁴¹

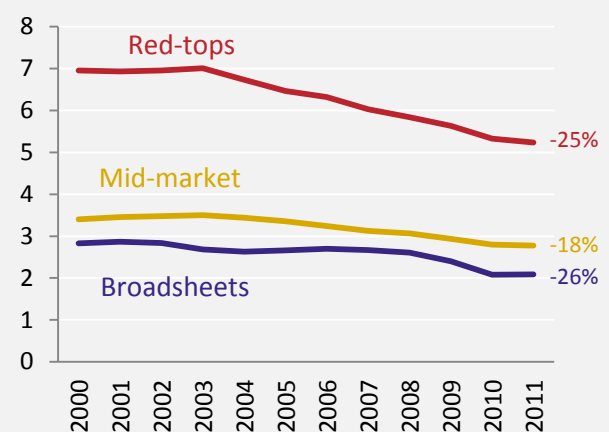
Conclusion

Twitter, blogs and other social media have become, amongst other things, a means for experts and stakeholders in many fields (in addition to ordinary citizens) to reach out directly to the audiences interested in those topics. This increasingly dilutes traditional media’s influence and is an important contribution to plurality.⁴²

Declining consumption of newspapers

One obvious advantage of the internet is that it is real time. This has attracted consumers to online news, and has raised their expectations more generally. As the Chartered Institute of Journalists has commented, “There is a hunger for instant consumption which has been driven by the internet.”⁴⁴ Clearly this is not something newspapers can provide in their print edition, and partly as a consequence all newspapers have been seeing rapid declines in circulation – all national dailies have seen annual declines in circulation of at least 2% per year since 2006, and most have been facing declines of 6% or more. As a result newspaper circulation has in aggregate fallen by just under a quarter since 2000, and all segments of the market have suffered, as Figure 11 shows. (By contrast, TV news consumption continues to grow moderately, with a spike in 2010 likely caused by the election).

Figure 11 Daily national papers’ circulation (m)⁴³



⁴¹ [Google search](#) of blogs, for the phrase “media plurality”, 11 February 2011

⁴² This is in addition to the direct impact social media is having on traditional media, as discussion in section **Error! Reference source not found.**

⁴³ ABC. Figures for January of respective year

⁴⁴ In: House of Lords Select Committee on Communications, [Inquiry into the future of investigative journalism - Oral and written evidence](#), 12 September 2011

Clearly if the print editions of newspapers are today less read, they *must* be less influential. This critical point is often missed – there can be undue focus on share of the newspaper market, but in assessing influence it is the absolute level of consumption that matters.⁴⁵

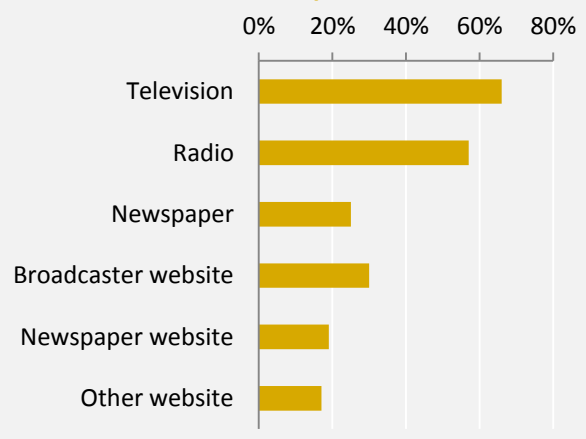
Consumers as sophisticated news users

Of course even consumption does not guarantee influence. A consumer who is dependent on a single source, and is highly trusting of that source, may well be very influenced by it. However as we have seen multisourcing is increasing, and the evidence suggests that consumers have a sophisticated and healthily sceptical understanding of the news they consume.

As noted above, they actively cross check, and they are well aware that newspapers are less likely to be impartial than broadcast news. Nor is it simply the case that they are aware of the partialities of papers but all choose to read one that matches their own partialities (though this may be the case for some titles). For instance, though the *Sun* is regarded by many as right-leaning, and though the title endorsed David Cameron at the last election, only a minority of its readers actually voted Conservative in 2010.⁴⁷ (Indeed, the voting patterns of readers of both the *Times* and the *Sun* were closer to those of the electorate as a whole than were those of any other national paper).

All this argues against the idea that readers take their outlook ‘spoon fed’ from their daily paper.

Figure 12 Portion of individuals saying news source is impartial⁴⁶



⁴⁵ Looking at this specifically in a political context, Prof Deacon and Dr Wring of Loughborough University have observed that “downward trend in circulation between [the 2005 and 2010 electoral] campaigns inevitably diminishes the electoral potency of the press”. See D. Wring and D. Deacon, “[Patterns of press partisanship in the 2010 General Election](#)”, *British Politics* (2010) 5, 436–454

⁴⁶ Ofcom, [The Ofcom Media Tracker survey: 2010 survey results](#), July 2011. Those scoring 1 or 2 on a scale of 1 to 5 of decreasing impartiality

⁴⁷ D. Wring and D. Deacon, *ibid*

Moreover, within media, consumers have very different perceptions of the titles they read. Some titles (such as the *Times*) are read for their perceived authority and accuracy. Others (such as the *Sun*) are read for their entertainment and sensation.

Notably, the ratings given to the *Sun* by its readers across a wide range of such dimensions are not notably different than those given to the *Sun* by the population in general.⁴⁹ This also suggests that the readers of the *Sun* are not in some way ‘captured’ by it – they see its strengths and weaknesses in much the same way as non-readers do.

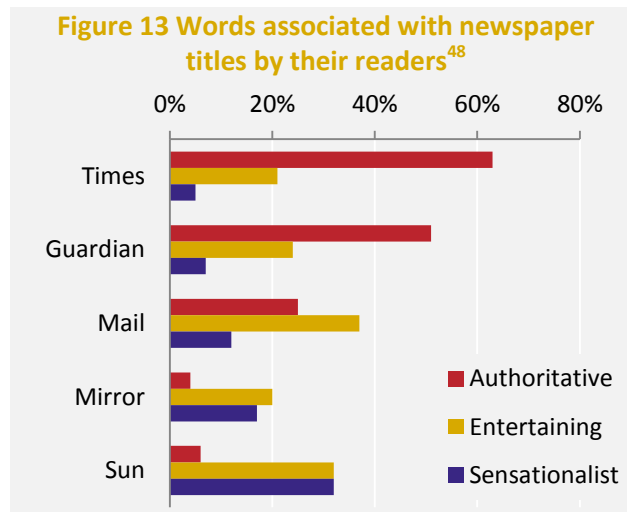
This all suggests an audience that are sophisticated in their news consumption, with a healthy scepticism that is a counterbalance to the influence that individual media outlets might have on citizens.

Conclusion

In the ‘chain of influence’, the link between news content and citizen outlook has come under particular pressure. A number of major trends of acted to weaken it:

- Consumers are increasingly getting their news from multiple sources
- They are accessing completely new news sources online
- They are increasingly sceptical of the news they consume
- Perhaps because of this they are consciously cross-checking what they consume amongst ever more news sources
- They are also now hear directly from expert commentators, politicians and other major subjects of news stories, diluting the influence of all media
- Finally, the influence of newspapers in particular has been greatly reduced by their fall in circulation over the period

We now turn to the initial link in the chain - how influential proprietors are on the content consumed.



⁴⁸ Mintel, *Consumer Perceptions of News Media*, September 2010

⁴⁹ *ibid*

3. Waning influence of proprietors on news content consumed

The evidence suggests that the influence of proprietors on what content is consumed is waning. There are two strands to this – less influence on which stories are covered and how, and less influence on which covered stories are actually consumed by audiences.

For a variety of reasons, we believe the choice of news stories, the way in which they are treated and their prominence are all subject to much greater external influence than they once were. Some of these developments are positive, some are negative, but all act to dilute the influence of proprietors – potential or real - on a newspaper's content.

TV's increasing importance in setting the news agenda

The ability of media owners to set the news agenda has also been changing. TV and the internet certainly play a far greater role in determining which stories get attention than was the case a decade ago.

For TV, this is in part because of the rise of 24-hour news. According to the Cardiff University study mentioned above:

“The ability of broadcast news to influence the next day's print news agenda is also a constant process, especially since the development of 24-hour television news. In every major newsroom there are a range of news channels playing in the background, and breaking stories often influence the content of the next day's edition”.⁵⁰

Roy Greenslade, Professor of Journalism at City University, writing in the *Guardian* in the context of last election, made a related point:

“It has long been assumed that papers played the leading role by setting the daily agenda. The advent of the leaders' televised debates, and the resulting instantaneous polling, has undermined that assumption”.⁵¹

Declining overall importance of the media's news agenda

The delinking of editors' lead stories and consumption

While a news agenda is in part about which stories get covered, it is at least as much about the hierarchy of stories. A critical choice for editors is which stories to lead with – to place on the front page, top of a bulletin and so on. Offline, such choices have material impact – what is on the front page will

⁵⁰ J Lewis et al (Cardiff School of Journalism, Media and Cultural Studies), [The Quality and Independence of British Journalism](#), 1 February 2008

⁵¹ Guardian, Election 2010: [What influence do newspapers have over voters?](#), 3 May 2010

certainly be more likely to be read. However news consumption online is much more atomized. Audiences typically do not consume (in order) a slate of news from a particular provider – they may arrive on any page of a website, not just the home page.

A consequence of this is that editors’ views (regardless of whether or not they match the proprietor’s) of which stories are most important matters much less online. The correlation between lead stories and which stories are actually read most is far weaker.

Consider the news home page of the BBC on 4th February 2012. The editor is leading with events in Syria, followed by impending snow. However, Syria is only the 10th most read story. The offline linkage between prominence and readership has not held up.

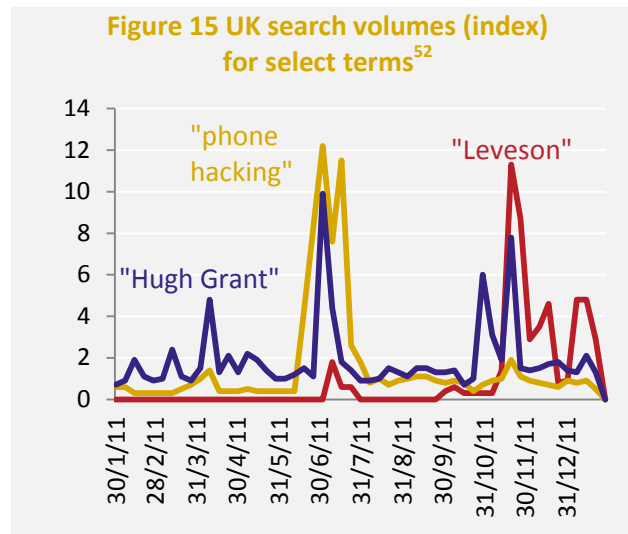
Figure 14 BBC home page vs most popular story



The second lead, snow, does contribute two of the top ten most read stories. But out of the ten ‘above the fold’ stories on the home page, only three make it into the ten most read, and conversely only four of the most read come from above the fold. Clearly the news agenda as experienced by the reader is rather different from the agenda as set out by the editor.

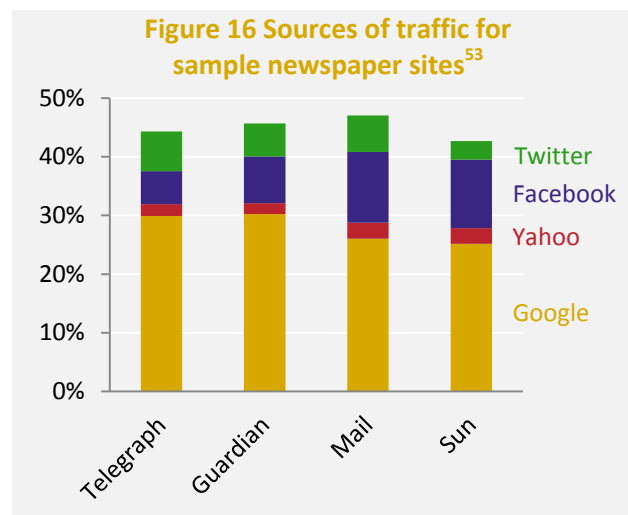
Importance of search and social media

As we have noted, one of the reasons why consumption does not follow the editor's hierarchy is that readers may arrive at any page in the site, not simply the home page. Indeed, this is true of much of a typical newspaper's traffic. There are two prime reasons for this: search and social media. Search is an important aspect of online news consumption – users frequently search for topical terms to find coverage, as Figure 15 shows. Such searches will result in direct links to relevant pages from many different news sources (and the web more generally).



News consumption via social media is generally more reactive. A tweet or a Facebook post provides a friend's recommendation of an interesting story (or an interesting angle on a well known story). Up to that point, the reader might have had no particular interest in that story, and of course the choice of news source is the recommender's, not the readers.

In aggregate, search and social media account for almost 50% of traffic to a typical newspaper website (see Figure 16). Such inbound traffic is fundamentally driven by the agenda of the audience, rather than the editor of the site itself, which is one of the reasons for the disconnect we saw with the BBC site. According to Alan Rusbridger of the Guardian, "[p]eople on Twitter quite often have an entirely different sense [from the press] of what is and what isn't news."⁵⁴ Of course, the interests of the audience are in part driven by what the media choose to cover, so there is an iterative process at work. However, the critical point is that the audience is (effectively) taking a collective view of the news agenda, based on all media outlets, which dilutes the power of any one news source to set the general agenda.



⁵² [Google Trends](#)

⁵³ Alexa, January 2011. Based on upstream sites- those visited immediately prior to visiting the newspaper site. Note that due to Alexa's limitation (eg a non-representative panel of users) these figures should be taken as indicative. However, they are broadly consistent with those in - for instance - Nic Newman (Reuters Institute for the Study of Journalism), [Mainstream Media and the Distribution of News](#), September 2011, allowing for the rapid growth of social media traffic. Note that for technical reasons Twitter referral traffic has been frequently underreported until recently – see TNW, [Twitter just got the respect it deserves](#), 21 August 2011

⁵⁴ Guardian, [Alan Rusbridger: Why Twitter matters for media organisations](#), 19 November 2010

Increasing influence of users on content

For the reasons set out above, the choice of stories consumed online is much more in the control of the reader than the editor. That said, important though online is, it is only one form of news media. However, the data news organisations get from their online audiences is increasingly influencing their output on *all* media.

According to the *Economist's* Digital Editor Tom Standage:

“In parts of [2010] we were growing by 20% a month on the amount of traffic from these [social media] sites so we’ve started to adjust and have started to think about doing journalism in a different way.”⁵⁵

Alan Rusbridger of the *Guardian* makes a similar point:

“What seems obvious to journalists in terms of the choices we make is quite often markedly different from how others see it – both in terms of the things we choose to cover and the things we ignore. The power of tens of thousands of people articulating those different choices can wash back into newsrooms and affect what editors choose to cover. We can ignore that, of course. But should we?”⁵⁶

According to BBC News Channel anchor Ben Brown, interacting with the audience via the internet “gives us a better idea of what they are actually interested in if we can hear from them not day by day, but minute by minute”. The Sky newsroom has screens informing staff in real time of the most popular stories on the broadcaster’s website.⁵⁷

Online interaction is influencing not just what to cover, but how to cover it. According to Nic Newman (writing in 2009):

“Indeed, on several occasions the strength and immediacy of reader opinion has influenced the BBC’s wider editorial line. Matthew Eltringham, Assistant Editor at the user-generated hub, recalls how strong and consistent negative reaction to the Archbishop of Canterbury’s speech on Sharia Law (9,000 emails) changed the agenda that afternoon, prompting the 6 o’clock news to ‘feature the strength of reaction and lead on the story’.”⁵⁸

⁵⁵ Nic Newman (Reuters Institute for the Study of Journalism), [Mainstream Media and the Distribution of News](#), September 2011

⁵⁶ Guardian, [Alan Rusbridger: Why Twitter matters for media organisations](#), 19 November 2010

⁵⁷ N. Fenton (ed), *New Media, Old News*, 2010

⁵⁸ Nic Newman (Reuters Institute for the Study of Journalism), [The rise of social media and its impact on mainstream journalism](#), September 2009

While editorial judgement remains critical in all these newsrooms, it is now tempered and influenced by the wisdom of the online crowd (or at least its opinions). Internet traffic is influencing the agenda choices and story content for print and broadcast as well as online itself. Again, the effect of this is to dilute the influence of the proprietor.

Conclusions

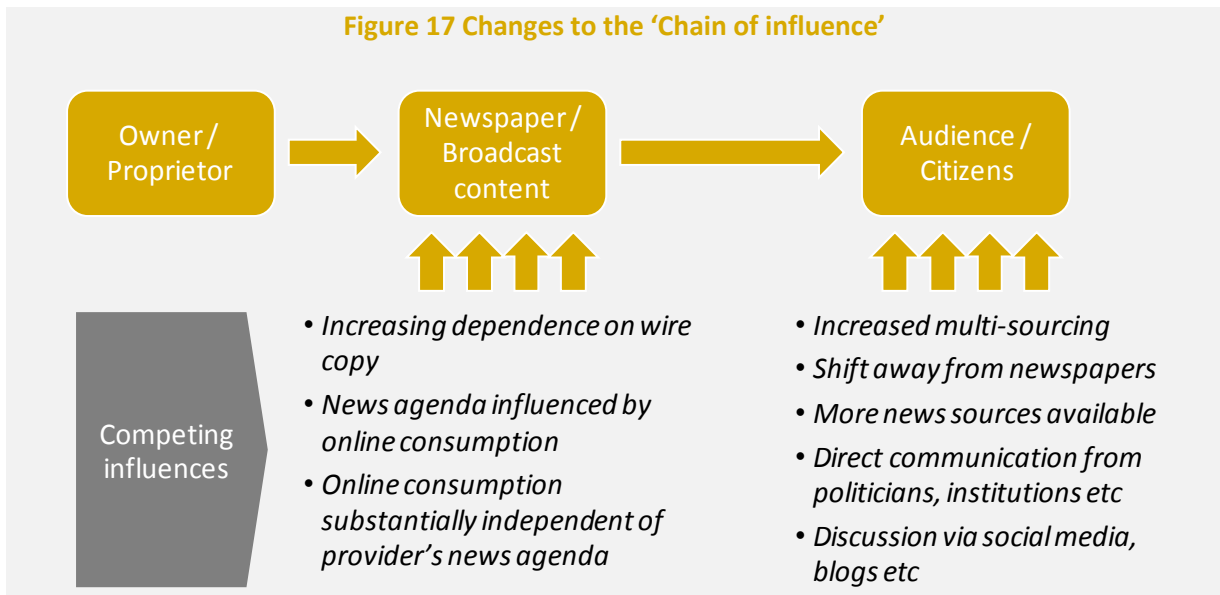
For a variety of reasons, media content is far more subject to external forces than it was. These reasons include:

- Greater reliance on wire services
- Greater flexibility for audiences to select particular stories rather than accept an agenda
- Far greater audience influence (articulated via online traffic) on editorial choices

This inevitably means that owners have lost appreciable control of what their audiences consume (the first link in the chain of influence).

4. Conclusions

As we have seen, the ‘chain of influence’ between proprietor/owners and the democratic process has been weakened substantially. In particular, any one news source is far less likely to be able to dominate the perspective of a given citizen, given the changes in the news market:



Influence has become both more diffuse and more iterative (in that audiences now influence news content much more than previously). The effect has been to dilute the influence of owners. Moreover, these trends will continue, with ever more news consumption shifting online, as use of social media rises, as newspaper circulation continues to fall and so on.

As we have noted, the purpose of plurality regulation is to achieve outcomes on the right hand side of this diagram – primarily to ensure a healthy and informed political discourse between citizens and politicians.

However, if the chain is growing weaker then regulatory interventions at the left hand of the chain are ever less likely to be effective. Plurality rules are just such an intervention, and simply tightening plurality rules looks unlikely to enhance their ability to achieve their objective.