



EXECUTIVE SUMMARY

REPORT ON THE CONSUMPTION OF INFORMATION



DEPARTMENT OF ECONOMICS AND STATISTICS

February, 2018

The data processing reported in the Report, unless otherwise indicated, are performed by AGCOM on the basis of the survey conducted by GfK Italia for the Italian Communications Authority (see Annex to the Report) and other GfK data. For the same, the indication of the source is omitted.

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It is widely recognized that news media are the primary source to which citizens turn for information but also to develop useful guidelines for political choices. The media, therefore, have great social relevance and are able to influence essential aspects of democratic life.

The institutional role and the regulatory action of the Italian Communications Authority (AGCOM) in the media sector, based on institutional mission and the tasks entrusted to it by the establishing Law, are based on the need to monitor the information system and ensure the protection of information pluralism, both on the supply and demand side of the news media markets. The constant monitoring of the news system by AGCOM is part of a global scenario currently characterized by the emergence of negative phenomena such as the issue of the spread of the so-called “fake news”, and more generally of misinformation. In this perspective, the Report on the news consumption aims at analyzing the most recent evolution of the sector.

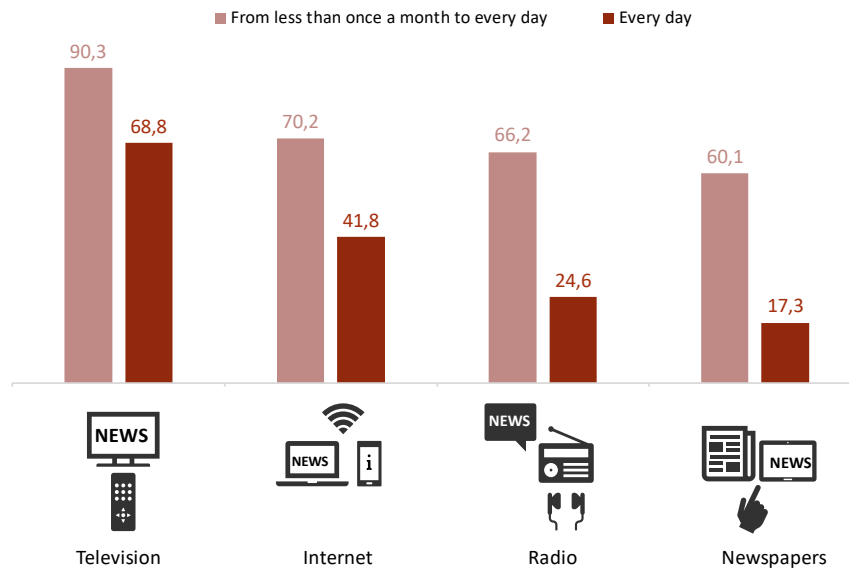
In particular, this Report presents an in-depth analysis of the paths leading citizens to actual acquisition of relevant information disseminated by the news media. Such analysis was carried out by investigating the modern access and consumption patterns of news distribution, as well as the factors likely to affect the aforementioned models.

The study, carried out, *inter alia*, on the basis of the results of a survey conducted in 2017 by GfK Italia for AGCOM on a sample of over 14,000 individuals representative of the Italian population, has highlighted some main evidences.

Based on the assumptions that: (i) information can reach individuals only if they make the decision to access media and the further decision to access news contents; (ii) news consumption does not necessarily takes place in an effective manner, the study shows that:

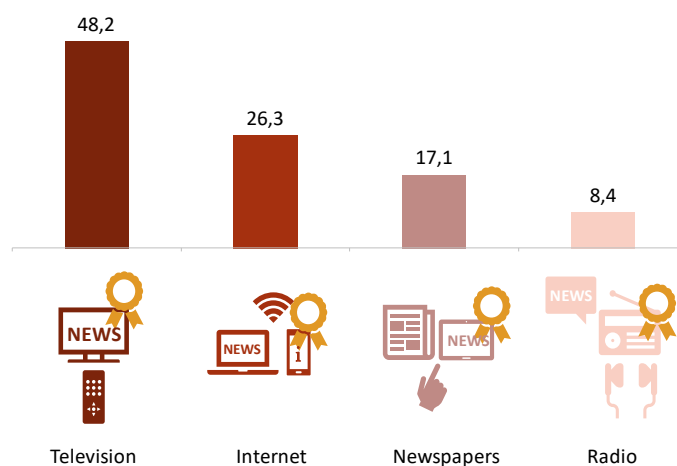
- *Almost all the Italian population accesses the media also in order to be informed and over 80% of citizens access information regularly (every day).*
- *The informative diet of Italians is characterized by a marked phenomenon of cross-media, which by now concerns more than three quarters of the Italian population. Only television still resists as a medium with its own catchment (about 8% of the population) of exclusive users (so-called captive). Finally, there remains a niche of Italians (about 5%) that is not informed at all (at least not through mass media).*

Use of media for news (2017; % population)



- *Television is confirmed as the medium with the greatest informative value, both for access frequency also for information purposes, and for perceived importance and reliability. Although less than 20% of individuals read newspapers on a daily basis, the percentage grows among individuals with a reading frequency less close in time. Even in this case, newspaper access is not far from the Internet and radio.*
- *The informative power of the Internet is on the rise: more and more people rely on this medium to search and access news (so as to make it jump to second place in the ranking of media with the highest access frequency when the purpose of use is informative) and over a quarter of the population considers it the more important to get information. However, the perceived reliability of online information sources remains on average lower than the reliability found for traditional sources.*

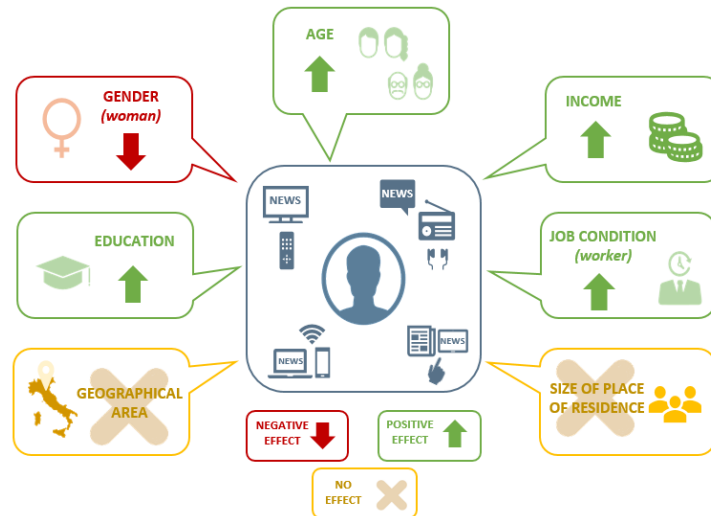
Main source of information for Italian citizens (2017; % population)



The empirical analysis on access to information and on the modalities of consumption of information contents have also highlighted other salient aspects:

- *In view of the growing diffusion of devices among the public and the multiplication of opportunities for use, the patterns of media and information consumption change. If, on the one hand, the possibility of accessing multiple media (in many ways and moments) increases the possibility of exposure to information, on the other, the emergence of consumption habits such as simultaneity in media uses and fragmentation (of audience, time and contents) can favor a superficial and careless consumption of the news, and increase the risk of misinformation.*
- *There are individual factors that lead to the division into different groups in access to information, with consequent risks of media exclusion or marginalization of certain segments of the population. In particular, education and economic conditions appear to be able to perimeter the social niches that risk, in the case of low school and income levels, to be marginalized in the current informational ecosystem. In this sense, even in a context in which access and cross-media increase, policy actions aimed at media inclusion, such as those aimed at favoring the education to media of potentially excluded social groups, are desirable.*

Effects of individual factors on the use of information



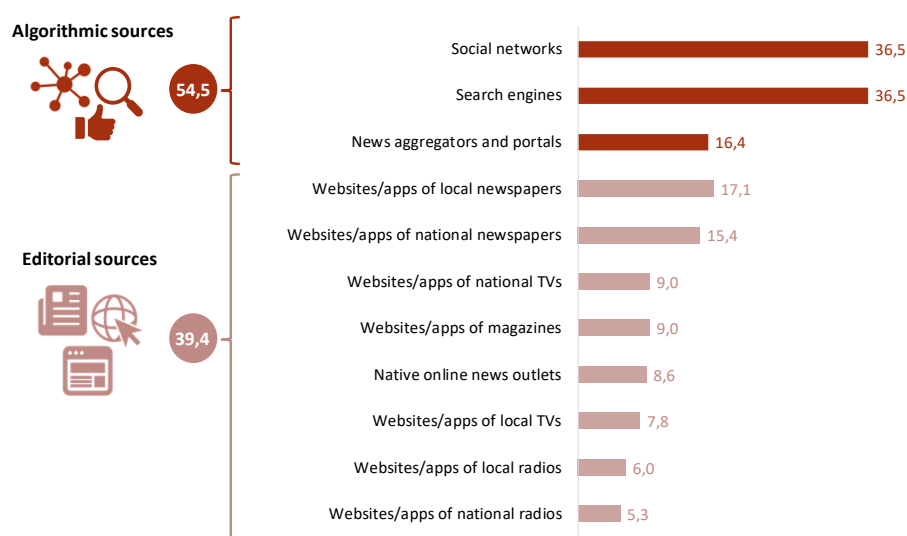
- *A specific analysis on the informative consumption of minors has highlighted an at least dual social system: on the one hand, there are portions of minors who do not get informed or are informed through a single medium - and that lead to questioning the information education process for the new generations - on the other hand, we observe the existence of other groups of minors with consistent recourse to a plurality of media and sources of information.*

Given the consolidation of the Internet as a primary source of information for citizens, this Report has provided a specific study on the new dynamics related to the consumption of online news by the Italians, pointing out that:

- *Italians access information online mainly through so-called algorithmic sources (in particular social networks and search engines), consulted by 54.5% of the population, while there is less use of the editorial sources (websites and applications of traditional and native online publishers). Moreover, 19.4% of the population indicates an algorithmic source as the most important within their own informative diet. In particular, the relevance accorded to search engines and social networks stands out, representing respectively the third and fourth sources of information, often reputed to be the most important for information, considering all the means of communication (classic and online).*

- Among the algorithmic sources, however, there is a lower perceived reliability, in particular for social networks, considered reliable or very reliable by less than 24% of those who consult them to find information.
- The Internet plays a major role in the media diet of minors. About a quarter of minors either do not get informed, or do so using only one mean of information, which is very often the web. The minors, however, turn out to be large consumers of social networks for information purposes: in fact, more than half of those who get information on the Internet use them for this purpose (55.8%).

Access to information through algorithmic and editorial sources (2017; % population)

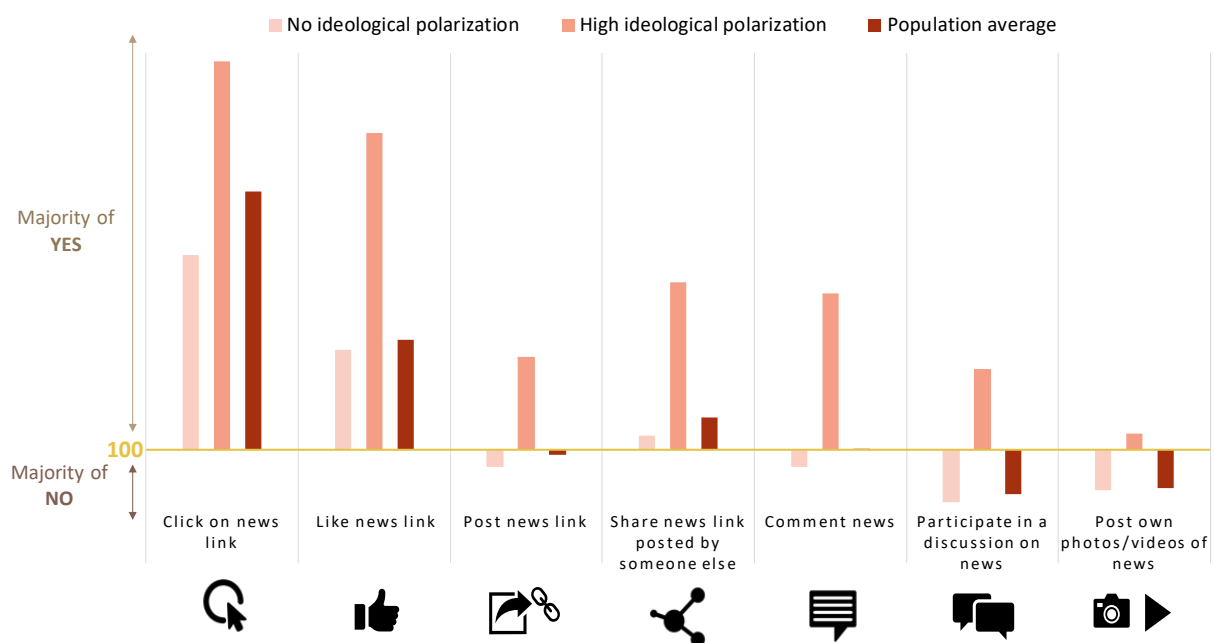


The examination of the characteristics and methods of fruition for informational purposes of the sources governed by algorithms, in particular of social networks, highlighted lights and shadows, mainly due to the variety and plurality of online sources, on the one hand, and to the scarce recognition of information on the web and the tendency of users of the medium to ideological polarization, on the other:

- There is a wide variety of online sources that differ in terms of type of publisher (traditional, online native), phase in the production and distribution chain of the information ecosystem (publishers, blogs, platforms), dissemination methods (editorial and algorithmic), brand reputation.
- Since platforms are often real gatekeepers for access to information, they are an increasingly important gateway to information for publishers and consumers.

- *In particular, in a context characterized by the "unpacking" of the information product and a fragmented use of content (articles, comments, videos, posts, etc.), online platforms act as intermediaries for access to online information by of the individual, access that very often is also the result of the incidentality and randomness of the discovery of the news by the same citizen, who however risks not having full awareness of the nature and origin of the information.*
- *The analysis of the existing relationship between the ideological polarization of social networks users and their online activities has shown that polarization can have a significant effect on the greater engagement towards news disseminated by social networks. The link between the conduct of all information actions on social networks (including those actions with the highest rate of user involvement) and the polarization has clear consequences on the materialization of phenomena of spread of radicalized positions and the creation of ideological bubbles.*

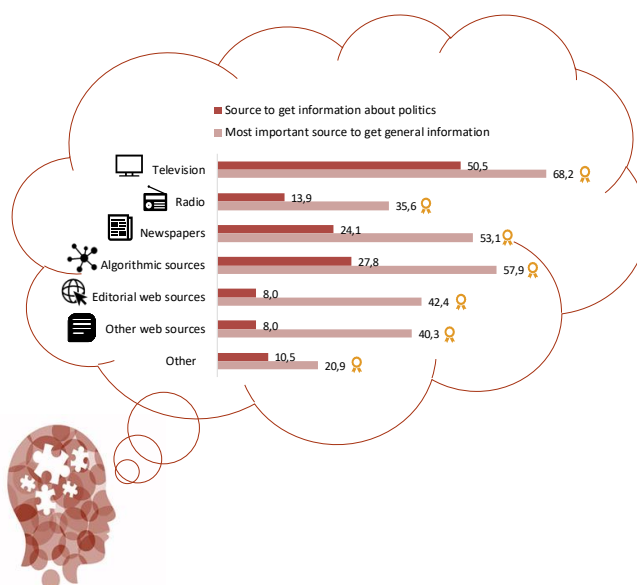
Relationship between "information actions" (e.g. sharing of news-related content by users) carried out on social networks and ideological polarization (2017)



Also by virtue of the AGCOM's powers in this area, part of the Report was dedicated to access to and consumption of political-electoral information, the latter crucial for the free formation of public opinion. In this regard, the study found that:

- *The ranking of the access frequency of the media used to obtain information does not change when it comes to political news, for which television and the Internet are confirmed as privileged sources by the Italians. However, it is found that, in the case of political information, the citizen presents a less broad and articulate consumption path of the news, that is less cross-media and hybrid between the various media, compared to general information consumption.*
- *A relationship of trust emerges between citizens and sources of information: the more these are chosen as primary in accessing current news (international, national and local), the more likely they are used by citizens to form a political opinion.*

Use and importance of media for political-electoral information (2017; % 18 years old and older population)



- *The most ideologically-oriented individuals use the Internet quite widely as a means of communication to learn about political-electoral choices, according to the dynamics that lead to the formation of the so-called echo chambers, characterized by individuals who only discuss within a circle of people ideologically close, tracing and sharpening the issues of selective exposure and confirmation bias. It is noted that the polarization already operates at the level of selection of the medium, and then “goes viral” as a result of actions performed on social networks by more active users and the concomitant work of custom algorithms that appear to favor the emergence of ideological bubbles.*

Index of differentiation between the use of the media for political-electoral choices by level of ideological polarization of citizens (2017; 18 years old and older population)

