The Resilience Report 2020:
How Europe's independent media dealt
with the coronavirus pandemic in 2020

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Contents

Introduction

When the coronavirus pandemic materialised in Europe in early 2020, media organisations could never have predicted the chaos and disruption that it would cause. The effect on them and their work was unprecedented in every way possible.

Luckily, just weeks after the first cases of COVID-19 emerged, the **European Journalism Centre** — in partnership with **Evens Foundation** — launched **Resilience Reports**, a series of in-depth studies looking at how dozens of news organisations across Europe dealt with the pandemic during the first wave. With limited information at that time about the impact of coronavirus on news media, the series aimed to address how smaller, independent organisations in particular were adapting their daily operations and business strategies to the new and challenging reality.

What became abundantly clear over the first several months was that the already difficult job of creating a sustainable media organisation had gotten a lot harder. The almost instant collapse in advertising revenue coincided with soaring traffic and the unprecedented demand for timely and accurate information. Journalists were under enormous pressure to stamp out misinformation and deliver public service journalism to audiences seeking vital health information and updates about ever-changing lockdown rules.

Amidst all of that, the economic blowback from the global downturn forced many news organisations, from the United Kingdom to Ukraine, to redevelop audience engagement strategies and rethink

their already-strained business models. Each of our **Resilience Reports** — which were published online between June and September 2020 — explored how organisations, and the people within them, coped with these unimaginable circumstances.

In those few months, we reported on **24 important and innovative news organisations across 19 European countries:** fact-checking news outlets from Spain, Croatia, Serbia and Turkey, investigative news outlets in Bulgaria, Hungary and Poland as well as local news outlets in France, Romania and Ireland. The series also shone a light on the early success of news organisations in Belgium, the UK, Spain and elsewhere that had pivoted to reader revenue.

We heard from editors, partnership directors, audience engagement leads, membership managers and CEOs to better understand the obstacles and pressures European media faced as a result of COVID-19. It was an inspiring experience and we're grateful to each of them for giving us their time and insight.

The result of their openness and generosity is a series of lessons that we hope can be shared in Europe and beyond to help support and sustain the industry when it comes to delivering quality content that connects with readers.

Especially as the financial and editorial challenges from COVID-19 are far from over, two key areas explored in our case studies. In fact, the pandemic continues to negatively impact and accelerate the decline of media globally. Many European news organisations are still relying on the same economically unsustainable business models for survival.

As for the editorial struggles, newsrooms are still strapped for time and resources for distributing vital public health coverage to audiences. Fact-checking has shifted away from debunking misinformation about the virus itself, to verifying information about the immunisations with the aim to combat vaccine hesitancy and mistrust. This is in addition to reporting on the ever-changing

government lockdowns and restrictions, the new variants and the daily coronavirus case numbers. The Resilience Report series' findings complement recently published research on COVID-19's impact on journalism. Most notably this includes findings from the latest **Digital News Report 2021** by Reuters Institute and the **The Journalism and the Pandemic Project's global survey** by the International Center for Journalists and the Tow Center for Digital Journalism at Columbia University.

The following report summarises the key themes from all 24 European case studies as well as the recommendations for funders looking to support. We hope you find it useful.

Key Themes

The news organisations we spoke to faced a raft of similar business and operational challenges as a result of COVID–19 and a number of themes cropped up repeatedly in our interviews. These were:

- **Reimagining existing business models**
  Experiments involving reader revenue models, such as donations and membership schemes (some of which were more subscription orientated), were quickly adopted in response to the collapse of the online advertising business.

- **Revamped audience engagement strategies**
  Outlets offered fresh ways for users to be involved in their journalism, including online chats and surveys, as a way to ensure stories served the needs of their audience.

- **Rise in public service journalism**
  Organisations prioritised activities, like fact-checking and investigations, and information, like databases of experts, that allowed citizens to make well-informed decisions about the pandemic.

- **A greater focus on under-reported groups**
  Newsrooms sought to ensure under-represented and under-reported groups — including but not limited to ethnic minorities, LGBTQIA+ people, migrants or refugees — were reflected in their coverage

Let's look at each of them in more detail.

Reimagining business models

with membership schemes It is no secret that advertising revenue decreased dramatically the first several months after the pandemic hit. According to **Reuters Institute Digital News Report 2020**, some publishers say advertising revenue fell by up to 50% and many newspapers have laid off staff and cut back or stopped printing copies of their publication. Many experts have even warned of a recent **'COVID-driven media extinction'**. One figure estimated a $30 billion loss of revenue for the newspaper industry over a 12 month period, according to **The Journalism and the Pandemic Project's report**. Meanwhile, digital advertising has struggled to help news organisations pay for running costs, nevermind make them profitable. This pressure, as we saw in many of our case studies, led organisations to move away from tumultuous advertising or sponsorship deals that can be lucrative but difficult to forecast.

To replace advertising reliant models, outlets adopted audience funded models that promised a greater degree of certainty about incoming revenue. For organisations in our reports, this mainly consisted of one-off or monthly donations and paid membership schemes.

The rise in membership driven or subscription led paid media was also supported by Reuters Institute's Digital News Report 2021. As noted in the report's executive summary, paying for online news was higher in a small number of wealthy European countries with a long history of high levels of print newspaper subscriptions. This included Norway (45%), Sweden (30%), Finland (20%), Switzerland (17%), and the Netherlands (17%). Meanwhile, just 9% say they pay for online news in Germany and 8% in the UK.

To help with this transition to a new business model, some sought to apply for the **several "COVID funds"**. In the last months of 2020, and the start of 2021, one such fund included the **European Journalism COVID-19 Support Fund**. Administered by the European Journalism Centre (EJC) and supported by the Facebook Journalism Fund, the $3 million fund aimed to support hundreds of community, local and regional European news organisations. This involved supporting community engagement, addressing critical business needs, and facilitating coverage of the pandemic. In the first wave of applications the EJC received a staggering 1,857 applications in total. In the end, 95 organisations and freelancers were selected as grant recipients for amounts ranging from $5,000 to $50,000.

> *"For us, members have always been very, very important. Our engagement with them has always been very strong, but now it is stronger than ever. And it will stay like that."*

Rosalía Lloret | CEO, eldiario.es

The speed with which outlets decided to change their funding model was a notable feature in our case studies. A number of organisations launched new revenue programmes within just a few months of the first COVID-19 cases in their respective countries. In normal times, this type of strategic work and implementation could take 6-12 months, maybe even longer.

In conversations with staff at these organisations, they recognised the opportunity to bring readers closer to their output and sought to attract members who believed in their organisation's mission and cause. Each adapted their language in messaging that asked for support and explained what being a member meant. News outlets offered multiple tiers of memberships, each of which had access to content in addition to a range of benefits, which included online

events, access to journalists, taking part in fact-checking or suggesting editorial content, etc. In the case of Are We Europe (Europe-wide), these tiers were based on feedback from members about what they could commit to financially.

Among the newsrooms that had made the jump to reader revenue prior to the pandemic, more time and energy during COVID-19 were dedicated to managing the membership or subscription journey. In many cases, fine tuning pricing structures, testing new messaging or modes of communications and revisiting budgets was more work than teams had imagined or had been prepared for. However, many saw significant growth and noted how reaffirming it was to see reader revenues rise during these difficult early months of the pandemic. These included:

- The Local added 11,000 paying members between March 2020 (15,000) and June 2020 (26,000), its most significant growth since launching membership in 2017. It now has a total of 45,000 paying members.

- Heidi.news more than doubled its subscribers from 2,500 in February 2020 to almost 6,000 by September 2020. As of May 2021, the publication has 6,500 subscribers.

- eldiario.es grew by over 18,000 members between March 2020 and May 2020, taking the publication to over 55,000 members in total. As of March 2021, a recent media report shows the publication has a total of 63,000 members.

Some news organisations addressed the resource challenge by working closely with plug-and-play platforms like Patreon and Steady to quickly bring new revenue models online. These interviewees spoke about how partnering with these tools gave them a base understanding of what makes users sign up and allowed them to launch quickly and with little custom development. In addition, they were able to make data-driven decisions about where new users were coming from and how they were converting

through their membership funnel. Other organisations didn't rely on these platforms and instead managed membership internally with their own tech stack and small teams working on pricing and campaigns.

Of the news organisations which had no membership or subscription models, each demonstrated a desire to launch such schemes but weren't always clear on how to make that a reality. Many weren't prepared for what this would entail and how this might turn their editorial processes and operations upside down. Giving up advertising and focusing solely on membership felt like too great of a risk or leap, especially given the unprecedented editorial workload. In this sense, not all were able capitalise on the coronavirus crisis.

Revamped audience engagement strategies
Audience engagement — the set of editorial tactics and techniques designed to identify and facilitate interaction with people that use your products — has been a staple within many news organisations over the years. However, these ramped up dramatically as a result of the renewed business pressures and the transition to newsrooms working remotely. Surveys, newsletters, webinars, focus groups, online events and crowdsourced investigations were just some of the ways that organisations ensured that their journalism served the needs of their audience during the pandemic.

Developing a deeper reader engagement by using audience analytic tools to monitor what coverage worked was another important takeaway highlighted by the **Media Development Investment Fund**. The organisation made these recommendations after surveying 39 media companies around the world about the financial and editorial implications of the pandemic on news media. The final survey results will be out later this year in its annual impact dashboard.

In many cases, these efforts were new and innovative and went far beyond the usual pre-COVID status quo. For instance, **Mediacités** answered questions crowdsourced from members of the public and sent out regular reader surveys to understand which topics their

audience wanted it to investigate more deeply. Some outlets also held online focus groups with current and potential members to better understand what membership might include **(Are We Europe)** or to canvas opinion about what new beat it should introduce **(Dublin Inquirer)**.

Many interviewees noted that adapting their organisation's audience engagement strategy gave them fresh insight into what audiences wanted from them. In a number of cases, the feedback led to a shift in content strategy; articles that fed into advertising-led traffic goals made way for useful content that was deemed valuable by readers. For example, **The Local** shaped its news coverage through feedback via Facebook Q&As, while **Heidi.news** and **Mediacités** employed reader surveys to better understand what conditions were like where they were and how they could do in-depth reporting that would resonate with them.

Some organisations went a step further and brought readers into the actual news gathering and production process. **Teyit** and **Maldita.es** launched online spaces that allowed readers to contribute their skills into the journalistic process while **NARA, formerly known as Nanook, (Lithuania)** invited listeners to introduce them to healthcare workers for their COVID-19 podcast. These outlets experienced an overall rise in reader engagement, although it has been difficult to pin that solely on this newly inclusive approach.

"From our COVID-19 experience, we learned that when we go to our readers with good pitches, they not only listen but also respond, they show interest in building a much better journalistic model with us, they want to be part of this."

Şükrü Oktay Kılıç | Teyit

Rise in public service journalism

With limited knowledge about the virus at the start of March, audiences came to news organisations confused, fearful and with lots of questions about what and who to believe. In the face of this unprecedented interest, organisations we spoke to talked about prioritising important information that affects the daily lives of citizens. This form of public service journalism became the de facto mode for many organisations during COVID-19 and we saw a number of article formats crop up across our case studies:

- Summaries - articles with data about daily cases and death tolls and key information from government press conferences in the event that readers didn't watch them live **(The Local, Mérce).**

- Explainers - specific information on national/regional lockdowns and tier systems for people looking for advice on how to minimise risk and stay safe **(OKO.press, elDiario.es).**

- Question and answer (Q&A) - readers' questions submitted would be answered with input from health experts and verified sources of public health information and published for other readers to learn from **(Maldita.es, Hromadske Radio).**

- Fact-checks - debunks of false information (including, in some cases, government press releases) that circulated widely in every country, particularly on social media **(Istinomer, Átlátszó).**

- Live blogs - the speed of new information lent itself to regularly updated live blogs which contained a mix of snippets of news, public health information and fact-checks **(Faktograf).**

Providing this vital service day in and day out was viewed as essential by organisations. In some cases, these articles were made free-to-read **(The Local)** and others were translated into different languages to expand the potential audience pool **(Radio ARA** and **Bivol).** For some outlets, like **NARA, formerly known as Nanook, (Lithuania)** and **elDiario.es,** its readers perceived this verified and accurate information as an act

of solidarity and gave donations or paid higher membership fees in response to the newsroom's work.

> *"As the crisis developed, we realised it was important to make some coronavirus content available to all readers. There was a strong public health case for doing so."*

Ben McPartland | Managing Editor, The Local

On top of fact-checking and other forms of public service journalism, there was also a trend for investigative journalism fueled by the public's demand for government accountability. Organisations, particularly in Eastern Europe, doubled down on stories about contracts for medical supplies, the misuse of emergency government powers and the treatment of journalists by government officials who sought to control the narrative. Many did so while also reporting on government elections or national protests and even while facing government intimidation themselves. Outlets like **Mediacités** and **Are We Europe** used investigative methods to look at what life after the pandemic might look like and address solutions to the underlying issues that COVID-19 had exposed.

It was no coincidence that the largely reader-funded news outlets that took less or no ad-revenue were more attracted to this type of public service journalism. Interviewees from these organisations told us that being audience or grant-funded gave them a license to take risks and investigate essential stories that other outlets couldn't or wouldn't look at. It also meant they were able to cover important issues largely ignored by mainstream news media.In almost all cases where public service journalism was employed, organisations saw increases in traffic, reader engagement and revenue, which interviewees put, at least in part, down to their efforts providing crucial health information in a time of crisis.

Vulnerability of public service journalism

While the pandemic highlighted the value of public service media to society overall, it also accelerated discussions within the sector around the vulnerability of public service journalism in terms of sustainability and growth. For instance, some news organisations we spoke to for the Resilience Reports, including eldiario.es, Are We Europe and The Local Europe highlighted their own concern around maintaining paid membership numbers in a post-pandemic world.

This was further highlighted in the 2020 News Report commissioned by the European Broadcast Union – **Fast Forward: Public Service Journalism in the Viral Age**. The heavily researched report shows how public state broadcasters like the BBC saw unprecedented spikes in television viewing figures they hadn't experienced since the 1980s. But for many outlets, those didn't last long. Meanwhile, the importance of public service media delivering digital content was further emphasised due to their ability to sustain viral website traffic for digital audiences.

Based on feedback from Editors-in-Chief at European media organisations, as well as their own insights, the authors make some predictions around news reportage and outline what media organisations need to do to keep pace with a fast-changing news environment. In summary, a handful of these key takeaways include:

• Being audience focused, not audience led is key;

• Invest in providing credible and trustworthy news

• People need critical journalism

• Online journalism is essential for legacy media

• Address "fake news"

• Fast change is possible

A greater focus on under-reported groups

Covering under-represented communities was another recurring theme of our Resilience Reports, following research that showed that the pandemic was disproportionately affecting minority groups. Interviewees from a number of outlets explained how they made a concerted effort to include a wide variety of different voices in their coverage and to shine a light on audiences often left out of traditional media narratives.

Women, particularly those that are non-binary or of colour, have been especially affected by the economic and social fallout of the coronavirus pandemic. This reality was reflected in the work of a number of our case studies, particularly **gal-dem** and **Hromadske Radio**. Focusing on topics such as domestic violence, parenting as a single mother and online harassment reflected the reality of the pandemic for many women while outlets also invested in producing more wellbeing and self-care content after it emerged that **COVID-19 caused people to experience severe mental health issues**. Audience feedback via social media and in response to membership drives suggested that this type of coverage, in tone and content, was not something women were able to get elsewhere.

Refugees and immigrants were another community disproportionately affected by the pandemic across Europe. Often forgotten by traditional legacy media, our case studies demonstrate how some organisations, including the likes of **Radio ARA** and **Solomon**, went to great lengths to produce essential content to ensure these vulnerable groups stayed up-to-date with the latest public health advice.

"Digging deeper into our audiences and seeking out these harder to reach language communities has been a really positive experience, I believe for all of us involved."

Lisa McLean | Managing Director,ARA City Radio

Their efforts involved tapping into existing networks of contacts to cover the reality of life during COVID-19 and to ask for further introductions to hard-to-reach groups. Through this route, Solomon discovered migrant workers forced to live in cramped conditions on a fruit picking farm. Stories were also often translated into different languages, including English, to ensure they reached as many of the intended audience as possible. Radio ARA, for example, enlisted multilingual volunteers to translate and broadcast daily bulletins from home in a dozen languages, including Tigrinya and Farsi.

These extra steps to reach marginalised groups led to spikes of engagement and assisted organisations, like **gal-dem** and **Solomon**, who decided to launch membership programmes during this period.

Recommendations

Through our research, we have identified a number of things funders can do to help support independent European journalism:

1. **Continue to fund the recovery.**
    Some organisations have pivoted their revenue models, attracted new readers, and built new digital products. However, they still need continued support. Their journey is at a precarious moment and needs more runway. Trust in teams and focus on operational support rather than restricted project funding.

2. **Focus on equitable media**.
    Communities of historically marginalised or underrepresented people have been disproportionately affected by COVID-19. Journalism organisations run by or for these groups often sit outside traditional funding and journalism support structures. Go beyond "donor darlings" and take risks supporting media that have been overlooked by other funders.

3. **Support revenue experiments.**
    Memberships and subscriptions are not the answer to everything, and we need to fund further development in other models like co-operatives, community campaigns and affiliate revenue. Digital advertising, especially against social and video, is bucking the trend of a global advertising recession and strategies need optimising in markets which cannot sustain reader revenue models. This is especially true where access to information might be prevented by reader revenue models.

4. **Develop business capacity.**
    Funders can create hands-on funded programmes to improve the business strategy skills of founders and leaders at scale. Entrepreneurs need help to develop profitable businesses and to attract private capital investment, as well as social or impact investment.

5. **Boost innovation.**
   Beyond funding for endurance and emergency funding, there is a lack of innovation funding to provide space for bold new ideas. We should not neglect unicorns and moonshots. Funders can fund training on audience data, product thinking and UX to accelerate other programmes and efforts.

6. **Find adjacent investors.**
   Collaborate and join forces with other foundations, corporate social responsibility programmes, and for-profit investors with aligned interests. Explore the full range of support and investment vehicles, including hybrid models that mix grants and investment. Align grantees with co-operatives and communities that can help them reduce costs and overheads through shared resources.

7. **Invest in networks.**
   Don't neglect to support networks and entities that deliver media support at a regional or international level. Direct support to media is important, but the wider ecosystem of trainers, researchers, experts and consultants play a vital part in supporting the resilience of emerging journalism organisations.

8. **Gather more data.**
   There is no comprehensive data available that tells us how many public interest newsrooms there are in Europe, how many journalists they employ, or how profitable or diverse they are. Investments in research will allow us to better understand and react to the needs of independent media.

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