WAN IFRA | REPORT

Time Spent Reading News Brands

Print–digital performance, online-only effects, and long-term trends

WORLD PRINTERS FORUM REPORT

IMPRINT

TIME SPENT READING NEWS BRANDS
Print–digital performance, online-only effects, and long-term trends

PUBLISHED BY:
WAN-IFRA
Rotfeder-Ring 11
60327 Frankfurt am Main, Germany

PUBLICATION DATE: October 2018

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ISBN 978-3-00-059866-1

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1. About the World Printers Forum

The World Printers Forum (WPF) promotes the printed newspaper. Its mission is to serve WAN-IFRA members in promoting and sustaining printed newspaper business and technology through collaborative research and development, global exchanges of experience, creating new standards, implementing environmental guidelines, developing new strategies, and fostering innovations.

It addresses all print-related questions. Its objective is to encourage innovation and productivity as well as product development that can be instrumental to publishers seeking to exploit future-oriented news media products.

WPF aims to be the central point of the international news media print community, including publishers, printers, materials suppliers, and equipment manufacturers for the print production value chain, from prepress to press to product finishing and delivery.

The World Printers Forum organises:

- International exchange
- Research and innovation
- Standardisation of processes and materials

WPF is the print community within the World Association of Newspapers and News Publishers (WAN-IFRA). It advises WAN-IFRA in all aspects of the printed newspaper. Newspaper production is defined as the business of production planning, prepress data handling and processing, and press and mailroom operations, including related topics in terms of management and technical implementation.

WPF is open to all WAN-IFRA members who are interested in the future of the newspaper printing business and print-related areas. It also partners with other organisations working toward the same objectives.

The World Printers Forum promotes:

- Improving productivity and profitability
- Sustainability
- Benchmarking
- The power of print

WPF's objectives are:

- Exploring customer expectations in communication with publishers and customers
- Strategy development for the newspaper printing business, including new and emerging business models
- International exchange of experience regarding business optimisation and innovation in product development, marketing, sales, and technology

WPF achieves its objectives by organising:

- Temporary and permanent working groups
- Research projects, reports, and guidelines
- Standardisation and certification projects in technology and business processes
- Benchmarking projects
- An annual international conference

Other WPF activities include:

- Advising WAN-IFRA regarding production-related events
- Maintaining a blog for discussion, working group interaction, and community engagement
- Promotion of "unique selling propositions" of print in an increasingly digital media environment
- To join the network go to www.wan-ifra.org/wpf

World Printers Forum Board Members

Board members represent various regions such as North America, Asia, and the Nordic, central, and south-eastern European countries, as well as the United Kingdom.

Members of the WPF Board in alphabetical order are:

- **Chair: Dr. Rick Stunt**, dmg media, London, UK
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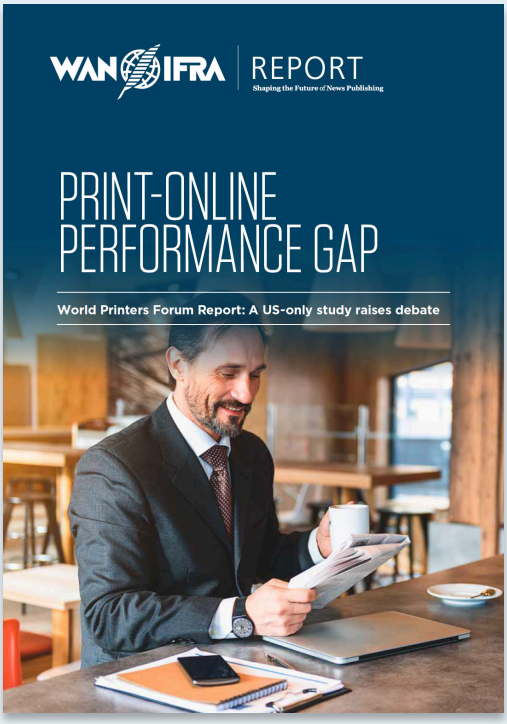
- **Peder Schumacher**, V-TAB AB, Gothenburg, Sweden
- **Mujo Selimović**, Publisher “Oslobodjenje”, Sarajevo, Bosnia and Herzegovina

2. About this report

One year ago, WAN-IFRA's World Printers Forum published a report about the "Print–online performance gap". That report, based on a US study, gave rise to a great deal of discussion in the international newspaper community. It was also the WAN-IFRA report with the most downloads in 2017.



Using a longitudinal analysis of the readership data for 51 US metropolitan newspapers, the study essentially found that newspapers' assumptions about their future – that "print will one day die" and "digital will rule" – were woefully off the mark, as were their subsequent strategies.

The 2017 report was mainly based on reach (percentage of readers reached in a market) and readership (number of readers) in print and online. Those measurements, however, only show a part of the total picture.

That is why the current report focuses on measuring reader engagement. "Time spent" is one of the most precise measures of media use and complements other measures.

Dr. Neil Thurman, Professor of Communication in the Department of Communication Studies and Media Research, LMU Munich, wrote the core essay of this new report, which is based mainly on data from the UK news media industry.

It shows the different engagement levels of reading online and in print: "Whereas print and online readers look alike in the light of the readership metric, time spent reveals them to be very different creatures, with very different habits in the frequency and duration of their reading." (Neil Thurman)

Nine industry experts answered our questions about this research study, and we document their answers in the second part of this report. Their statements differ because of their different backgrounds. But they agree that print remains an integral part of the news publishing business and that "publishers should give their print product the required attention".

We hope this new report will again support the ongoing debate about the future of news publishing, and we welcome your comments.

Manfred Werfel
WAN-IFRA Deputy CEO

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3. Executive summary

This study is based on data from the last few years concerning newspapers with regional and national distribution in the United Kingdom. The author, Dr. Neil Thurman, is Professor of Communication in the Department of Communication Studies and Media Research at the Ludwig Maximilians University (LMU) in Munich, Germany.

Thurman concentrates on the amount of time news consumers spend reading print and online media. He comes to the conclusion in his study that "print readers are vastly more loyal and attentive than their online equivalents". Thurman explains his focus on the measure of "time spent" by asserting that this measure "allows us to see just how meaningful newspaper reach actually is".

The author shows that "of the time spent with one large regional and seven national UK news brands by their British audiences in 2016, 86 % was still in print with just 14 % online". His investigation reveals a major difference in the attention of online and print readers: "Readers of newspapers' weekday print editions spend an average of 40 minutes with each issue, whereas those same newspapers' online editions are visited for less than 30 seconds per visitor per day."

In his longitudinal analysis of the years 1999 to 2016, a general decline is observed not only in print circulation but also in time spent reading newspaper brands, whereas over the same period digital page impressions increased. So, "has, then, this new, online source of audience attention made up for the losses from print? For most newspapers, it has not."

Based on an analysis of the correlation between the age of the readers and their reading behaviour, Thurman concludes that "although digital distribution has allowed newspaper brands to reach out to younger audiences, the fleeting attention paid by those accessing newspaper content via PCs and mobile devices has diluted digital distribution's rejuvenating effects".

Thurman also investigates the exceptional case of the newspaper The Independent, which ceased production of its print edition in March 2016 and switched exclusively to digital distribution. "The fall in total attention experienced by the brand after the switch was 81 %."

In summary, Thurman states:

- "The time spent metric (is) helping dispel misconceptions about the extent to which digital distribution can engage readers and substitute for the medium of newsprint." He cites the Financial Times's assertion that "time-based metrics value quality content over quantity, real reader engagement over clicks".
- "The loyalty and attentiveness of print readers, and the consequent visibility of newsprint as an editorial and advertising medium, is something that many have overlooked in the dash to digital."
- "Publishers should take inspiration from print's unrivalled ability to engage; from its design cues, which have been refined over centuries; and from the contained experience and sense of completion it gives. It is not coincidental that information on paper makes deeper impressions and is easier to recall."

At the end of his essay, Thurman discusses whether the results of his research, based on British data, can be generally applied and concludes: "I would expect the gap between the time spent with newspapers' print and online editions to be even greater in many other markets."

4. Time Spent Reading News Brands

Print–digital performance, online-only effects, and long-term trends

Newspapers matter. They contribute to the health of democracies, helping to create an informed populace and providing a check on those in power (see, e.g., Gilson, 2016). The metrics that we use to measure their performance matter too. Certain metrics hide certain facts about performance, and if we want to predict, and prepare for, the future of newspapers, we must have as full a picture as possible of the situation that they find themselves in and how they got there. In particular, we need metrics that allow a clear-eyed evaluation of how print performance compares with digital.

This essay will argue that by focusing on reach – the gross or net readership that newspaper brands attract – publishers, and the measurement organisations that work on their behalf, have promoted a false equivalence between print and online readers. It will show how print readers are vastly more loyal and attentive than their online equivalents and how these variables can be combined with reach to produce a single metric – time spent – that provides unique insights into news brands' multi-platform performance.

In most regions – Asia being the notable exception (WAN-IFRA, 2017) – newspapers' print circulations have been falling. Advertising revenues too. Many newspaper brands have been shifting resources away from print towards digital, assuming, or hoping, that digital will be the industry's salvation. This idea, however, has been challenged. H. Iris Chyi's (2017) important and provocative World Printers Forum essay, for example, put the cat amongst the digital pigeons. It presented evidence that, despite two decades of investment in digital, US metropolitan newspapers, in their home markets, continue to reach more readers via their print editions than via their websites. While acknowledging print's problems, Chyi suggested that the apparently doomed print platform is in ruder health than its digital counterpart.

This was not a claim many people wanted to hear, and Chyi's findings were questioned, sometimes with justification. The Scarborough data that she used, for example, didn't include the use of newspapers' mobile apps, which for many newspapers have overtaken websites as the pre-eminent digital channel. In addition, the data on online consumption was derived from a questionnaire based on participants' recall. Research has shown that most people under-report their use of websites and mobile apps when asked and that passive measurement is more accurate (see, e. g., Collins et al., 2017). These facts created the possibility that digital was not doing quite as badly as suggested.

The present essay, however, does take mobile apps into account and does use data on online consumption collected via passive measurement. It is based on studies (Thurman, 2017; Thurman & Fletcher, 2017a; Thurman & Fletcher, 2017b) that examine the performance of UK national and regional newspapers in their print and digital channels over the last few years, and though its methodology and sample differ from Chyi's, its main finding does not: digital is failing to deliver.

Moreover, the extent to which it is failing may be even greater than Chyi suggested, because her study made use of the readership metric, which is a metric that flatters digital performance. Chyi, indeed, observed that it might be fruitful to consider digital performance using an alternative metric: that of time spent. The current essay expands on that observation and argues that time spent has advantages over readership as a metric, allowing us to see just how meaningful newspaper reach actually is. Whereas print and online readers look alike in the light of the readership metric, time spent reveals them to be very different creatures, with very different habits in the frequency and duration of their reading. In the UK, for example, readers of newspapers' weekday print editions spend an average of 40 minutes with each issue, whereas those same newspapers' online editions are visited for less than 30 seconds per visitor per day (Thurman, 2017).

The metrics used to measure newspaper consumption across multiple platforms have long been problematic, and, it is possible to argue, kinder to digital than to print. In many countries for many years newspapers' print and online audiences were reported using different and difficult-to-compare metrics. Newspaper reach would mostly be reported on a daily basis for print and a monthly basis for online, which, to the unsuspicious eye, gave online figures a more impressive look than their print equivalents. It may be that publishers tolerated such circumstances for so long because the data supported a convenient narrative:

that though their print circulations were in decline, they were building large online audiences that would carry them forward into a bright digital future.

In some countries, newspaper measurement is now changing. The Publishing and Data Research Forum's 2017 summary of audience research worldwide (PDRF, 2017) shows that in at least 18 countries around the world,[1] data on print readership is being fused with data on digital reading producing net – deduplicated – readership figures for print and online, reported over the same time periods. While an advance, such systems still deal in readership rather than time spent, and so leave the fleeting nature of online readership unremarked.

The validity of time spent as a metric is, however, receiving increasing recognition. In his Ipsos Connect report "It's about time: Measuring media impact", Andrew Green (2016) writes that "time is a useful complement to reach in assessing the value of different media opportunities to advertisers". Recent research has suggested that time spent is the "biggest predictor of whether readers notice advertisements" (Petric et al., 2017). The Financial Times believes "time-based metrics will benefit publishers" because they value "quality content over quantity, or real reader engagement over clicks" (FT.com, 2015).

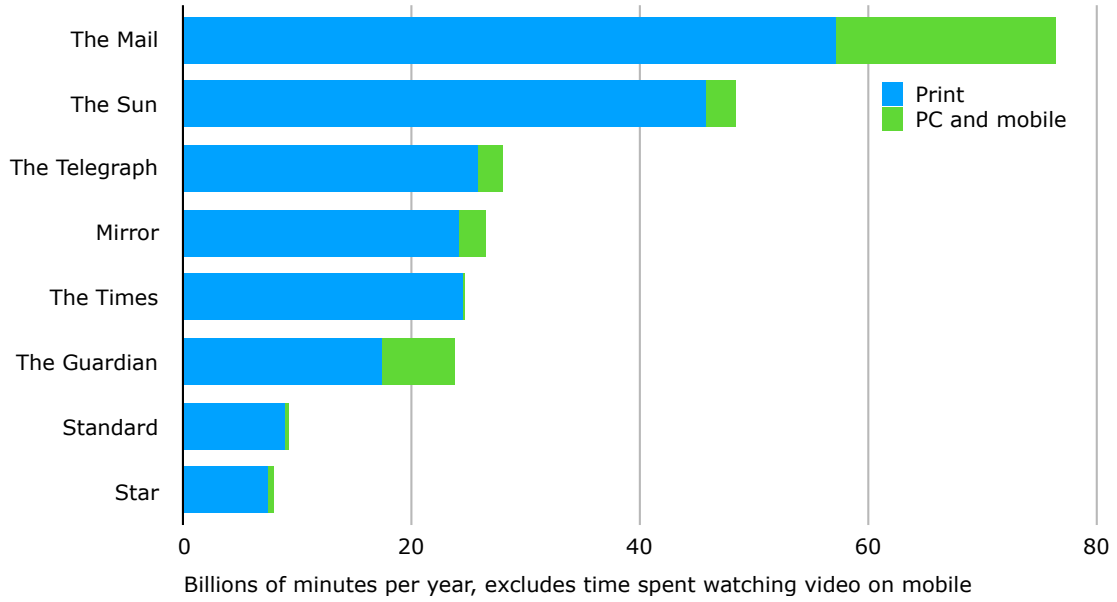
This essay examines the performance of UK newspapers' print and online editions in the light of time spent. The data was provided by the UK's National Readership Survey, the Audit Bureau of Circulations, and comScore. It allows us to ask if readership figures mask certain truths about the attention that newspapers receive in the digital age. What kind of reader do you get with digital? Is digital a means of attracting younger readers? And what kind of heft do newspapers have when digital is the platform that they speak from? The example of The Independent, the first general-interest daily national newspaper to go online-only, gives us an idea of what an entirely digital future might look like.

1 Australia, Brazil, China, Denmark, Estonia, France, Germany, Greece, Ireland, Mexico, New Zealand, Norway, Romania, Russia, Sweden, Switzerland, Thailand, and the United Kingdom.

4.1 Newspaper performance as measured by time spent

The metric of time spent demonstrates the continued importance of the print channel for newspapers. Of the time spent with one large regional and seven national UK news brands by their British audiences in 2016, 86 % was still in print with just 14 % online (see Figure 1). Digital performance is underwhelming, but there has been growth in the importance of mobile, which represents about two thirds of the online time spent.

FIGURE 1: Total minutes spent reading by the aggregated British print, PC, and mobile readerships (18+) of each of eight UK newspaper brands, 2016.



Sources: NRS and comScore.

The data also shows there are significant variations in digital performance between brands. The Mail and The Guardian stand out as significantly more successful online. The popularity of the MailOnline is, in part, due to an editorial approach focused on entertainment and celebrity – very different in character from the more conservative stance taken in print – that has helped it to appeal to younger digital consumers (see, e. g., Bartlett, 2012). The Guardian has sought to build scale online, keeping content free-to-access, and "shifting focus, effort and investment towards digital" (GNM, 2011). It should be noted, however, that for The Mail and The Guardian, the most successful digital newspapers in the UK, online reading time represents only around a quarter of the total time spent

with the brands by their British audiences. Three newspapers – The Times, the London Evening Standard, and the Star – stand out for the smaller than average proportions – 1 %, 3 %, and 7 % respectively – of total attention that come via their online editions. The reasons for the relatively small amounts of time spent with these brands' digital editions vary. The Times has an online paywall which, given that only 3 % of the UK population pay for online news (Fletcher, 2017a), severely limits the number of online visitors to its website and apps. The London Evening Standard (from hereon in "the Standard"), a regional newspaper, doesn't have the national coverage of the other brands, giving its online content narrower appeal. Furthermore, given it is distributed in print free of charge, there is less incentive for its audience to visit its online editions. Like the other tabloids, the Star faces stiff competition from many digital-born sites that also package news content in amusing or entertaining ways.

4.2 The long-distance market

The data presented thus far relates to UK news brands' national or regional audiences. For most newspapers around the world these home audiences matter most. However, the internet has allowed titles to reach out to audiences further afield that are not served by their print editions. For example, the Jerusalem Post's website receives 71 % of its readers from the United States (Jpost.com, n.d.). Most UK national newspapers also receive a majority of their online browsers from overseas (Thurman, 2017). So, does this long-distance online audience add much to the overall attention received by UK newspaper brands? For most it is only a minor boost. For 80 % of the newspapers listed in Table 1, only 4 % or less of the attention they receive comes from their overseas online visitors. There is one exception, The Mail. It has expanded in overseas territories, launching a US online edition in 2010 (MailOnline, 2014) and an online operation in Australia four years later (Greenslade, 2013), by which time it had also established an American headquarters in New York and was employing 200 people stateside (MailOnline, 2014). However, despite this investment, overseas online visitors are the source of just 7 % of the total time spent with the brand.

TABLE 1: Estimated proportions of total annual time spent with each of five UK national newspapers by their British and overseas print and online audiences, April 2015 to March 2016 (inclusive).

	% of annual time spent with the brand			
	British audience		Overseas audience	
	Print	Online	Print	Online
Express	92	4	3	2
The Telegraph	84	9	3	4
The Sun	93	2	4	0
The Mail	68	20	5	7
Star	84	4	11*	2
AVERAGE	**84**	**8**	**5**	**3**

* The relatively high proportion of overseas print reading time received by the Star is due to its high circulation in the Republic of Ireland.

Rows may not add up to 100 % because of rounding. Sources: NRS, comScore, ABC.

4.3 Post-millennial change

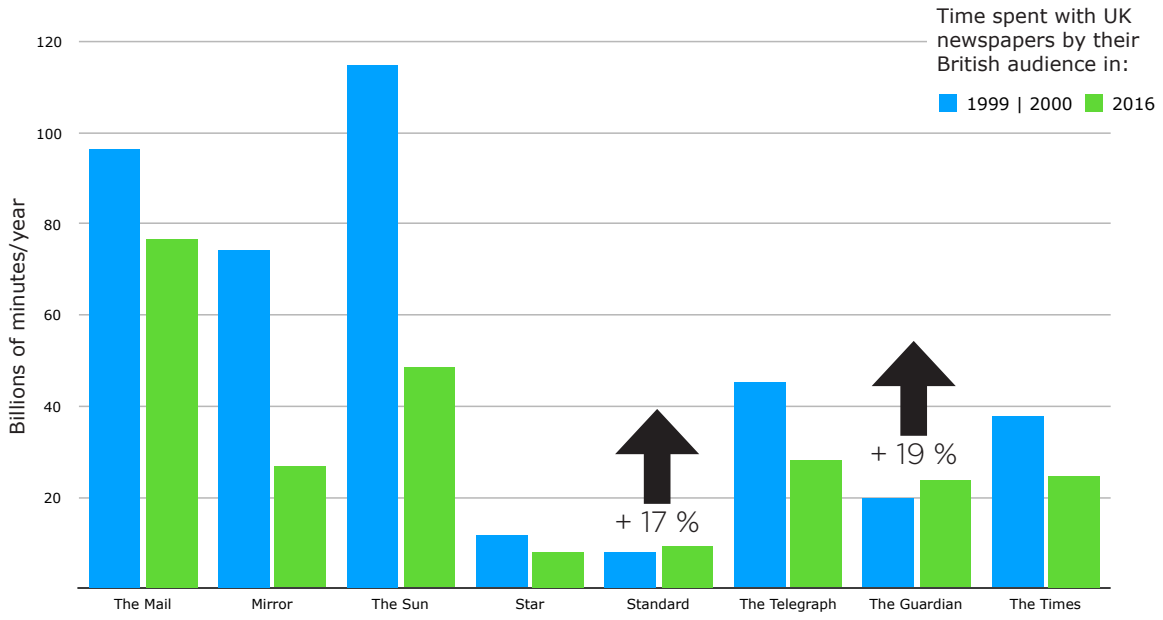
So far we've looked at snapshots, from 2015 and 2016, of newspapers' multi-platform performance through the lens of time spent. How did we get to this point? How has the time spent with newspaper brands changed over time? The total attention given to UK newspapers' print editions has been falling for decades – a result, mainly, of declines in circulation but also of a shortening of the length of time each issue is read. However, starting in the late 1990s, UK newspapers began to go online, with their digital traffic growing hugely in the years that followed. For example, monthly worldwide page impressions at the Guardian, Star, Telegraph, Standard, and Mirror increased by an average of more than 70 times between October 1998 and December 2015.[2] Has, then, this new, online source of audience attention made up for the losses from print? For most newspapers, it has not.

Between 1999/2000 and 2016 our sample of eight UK newspapers suffered a drop in attention of 40 %. In 1999/2000 their British adult audiences read the newspapers' print editions for a total of 407 billion minutes a year. By 2016 those same newspapers' print and online editions were being read for a total of 245 billion minutes a year (see Figure 2).

2 Sources: ABC (2015) and NMA (1998).

Two brands, however, bucked this trend. The Standard received 17 % more attention than in 1999, and The Guardian 19 % more. The Standard's decision to stop charging for its print edition in 2009 increased print readership and hence time spent with the brand. Readership has more than tripled since it became a free-sheet. Of course, print distribution is relatively economic in a densely populated city like London. Most copies of the Standard are distributed at transport hubs, like tube and bus stations. Such an efficient physical distribution network is not available to many, probably most, newspapers.

FIGURE 2: Changes in total annual attention (measured by minutes spent reading) received by each of eight UK newspaper brands from their British audiences between 1999/2000 and 2016.



Reading time for 2016 includes PC, mobile, and print audiences. Only print reading time is included in the 1999/2000 figures. In 1999/2000 the time spent reading online was insignificant for this sample of newspaper brands. Sources: NRS and comScore.

In the case of The Guardian, losses in the attention received by its print products have been more than offset by its success in digital distribution. Although between 1999/2000 and 2016 there was a drop (of 13 %) in the aggregated time print readers of The Guardian were spending with the brand, the duration of attention coming via the title's online editions more than made up those losses. It should be noted, however, that 2016 was an exceptionally successful year for The Guardian. Print readership was slightly up on the previous two years and the average time spent reading the title's print editions was considerably higher than in the previous four years. Furthermore, in 2016 the time spent

with the brand online was over a third higher than it was in 2015. Without the 2016 Trump and Brexit "bumps" in news consumption, which are likely to have increased both readership of, and engagement with, The Guardian, it is probable that we would have seen no change in the time spent with the title since the turn of the millennium, or even a small fall.

4.4 The effect of age demographics

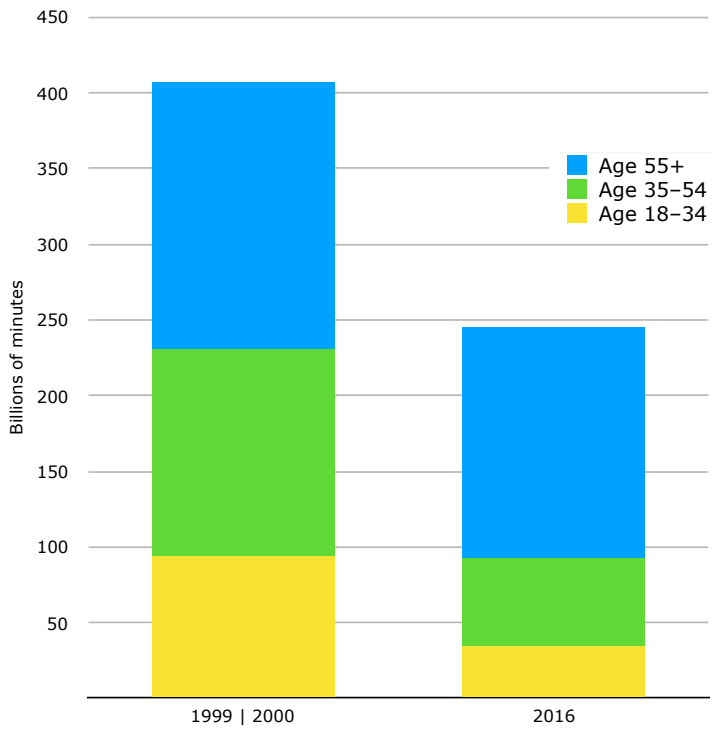
We've seen, then, that of the time spent with a sample of UK newspaper brands, by far the larger part still comes from their print editions, and that the time readers are now spending on these newspapers' websites and apps has not offset the post-millennial falls in the time spent with their print products. How might we explain this circumstance and how might we expect the future to unfold? Analysing changes in the consumption patterns of audiences of different ages offers some clues.

Age has been identified as one of the most important determinants in newspaper use across countries (e.g. Elvestad & Blekesaune, 2008). Peiser (2000) found that over half (56 %) of the decline in daily newspaper reading in the United States, and a third in West Germany, was due to cohort effects, as younger cohorts who read less frequently replaced older cohorts who read more frequently.

Peiser's study, however, related to a period (1970 to 1996) when newspapers were consumed almost exclusively in print. Could it be that digital distribution has disrupted matters and that those within cohorts who were drawn away from newsprint by novel electronic media are returning to newspaper brands now that those brands are making their content available online? Could it also be that those who were socialised after the advent of digital never developed the sense that newspapers were old-fashioned, and instead consume them without prejudice, as they would any other genre of content?

Looking at changes in the total time spent with newspaper brands by the young, middle-aged, and older audience segments between 1999/2000 and 2016 shows that, collectively, younger readers spent far less time with newspaper brands in 2016 than was the case in 1999/2000 (see Figure 3).

FIGURE 3: Changes in total annual attention received by eight UK newspaper brands from their younger (18–34), middle-aged (35–54), and older (55+) British audiences between 1999/2000 and 2016.



Reading time for 2016 includes PC, mobile, and print audiences. Only print reading time is included in the 1999/2000 figures. In 1999/2000 the time spent reading online was insignificant for this sample of newspaper brands. The eight newspaper brands are The Mail, Mirror, Star, The Telegraph, The Guardian, The Sun, Standard, and The Times. Sources: NRS and comScore.

Those readers aged 18–34 at the turn of the millennium have now grown into middle age. Amongst this group we see a considerable fall in the time spent with newspaper brands, indicating behavioural (intra-cohort) change. However, the fall is not as great as that observed among younger readers, indicating that media consumption habits acquired early in adult life continue to be evident in middle age.

Most of those who were middle-aged at the turn of the millennium had joined the ranks of the over-54s by 2016. Because this age bracket also includes (surviving) newspaper consumers who were 55+ in 1999/2000, cohort effects and intra-cohort change are more difficult to determine. However, it seems clear that there has been less intra-cohort change among those middle-aged and older, in line with other research that has shown older audiences tend to "adhere to familiar media practices, with only a minority making intense use of new practices" (Nimrod, 2017).

In seeking to explain these changes, we must ask whether the drops in the time spent with newspaper brands by the young and middle-aged are a result of those age groups avoiding newspaper brands altogether or of their consuming those brands with different devices and frequencies. The evidence suggests the latter. The attention newspaper brands received via PCs and mobile devices from their younger, middle-aged, and older readers in 2016 was relatively evenly distributed: 35 %, 42 %, and 23 % respectively. This supports other research (see, e.g., Ofcom, 2016) which shows that over a third of the young and middle-aged are still exposed to newspaper brands. However, as we have shown, the time spent with newspaper brands online is far less than it is in print. So, although digital distribution has allowed newspaper brands to reach out to younger audiences, the fleeting attention paid by those accessing newspaper content via PCs and mobile devices has diluted digital distribution's rejuvenating effects. Without radical change, it is likely that cohort replacement will mean the decline in the time spent with newspapers has some way to go before it bottoms out.

4.5 Insights into a post-print future

So far we have been considering newspaper brands whose distribution is divided between digital and print. What of brands that have decided to put all their eggs in the digital basket? An example here is provided by The Independent, which, in March 2016, became the first general-interest daily national newspaper to go online-only.

There has been much speculation about how long newspapers will persist with print. Steve Ballmer, Microsoft's former CEO, predicted there would be no print newspapers or magazines by 2018 (Romenesko, 2008). Here we are, however, in the year of print's predicted demise, and print is still with us. Many papers have slimmed down, shed staff, and even gone into the red, but relatively few, thus far, have made the move to online-only. Those that have include the Christian Science Monitor, the Seattle Post-Intelligencer, and Finland's Taloussanomat.

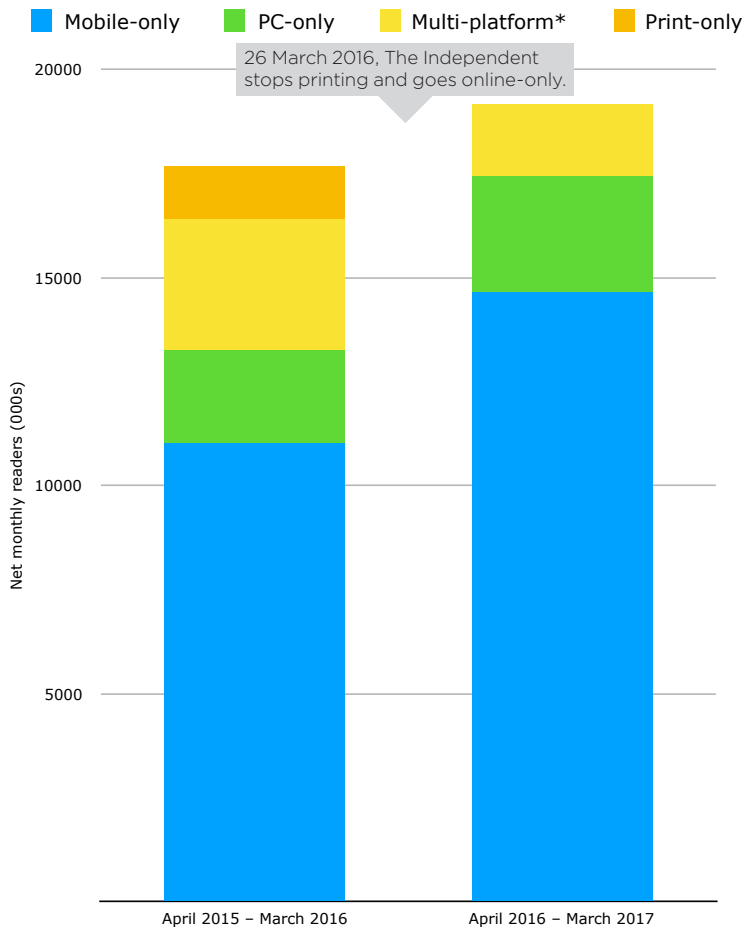
There have been only a few studies investigating the effects of such a move (e. g. Thurman & Myllylahti, 2009; Groves & Brown, 2011; Usher, 2012). Those that exist have usually concentrated on the effects produced in the newsroom, and have discovered journalists concerned at the level of attention they have to pay to audience metrics. The effect on audiences has remained largely unexplored. What happened to The Independent's audience when The Independent abandoned print?

The Independent was a relatively late entrant into the British newspaper market. It was established in 1986 as a national daily broadsheet newspaper. The brand was distinguished by a provocative editorial approach that involved the trumpeting of its political independence and a focus on the arts. This proved especially appealing to younger readers, and in the early 1990s the paper briefly surpassed The Times in weekday print reach, with a circulation of close to 390,000 (Crewe & Grosschalk, 1995).

Following an economic downturn and a broadsheet newspaper price war, however, its fortunes began to change, and the subsequent years saw a succession of new editors and relaunches, including, in 2004, a switch to tabloid format. In 2010 it was bought by Russian businessmen Alexander and Evgeny Lebedev for £1. In 2016, with its weekday print circulation fallen below 60,000, and annual losses of £6 million, the decision was taken to move to online-only.

Was this wise? By some measures, yes. Compared to the 12 months before the transition, the 12 months following saw an increase in net monthly readers of 7.7 %, with mobile-only readers predominating. The number of mobile-only readers grew significantly, by 31 %. This increase in mobile-only readers more than made up for the loss of print-only readers (see Figure 4).

FIGURE 4: Net (deduplicated) monthly British readership (aged 15+) of The Independent in the 12 months before and 12 months after it stopped printing and went online-only.



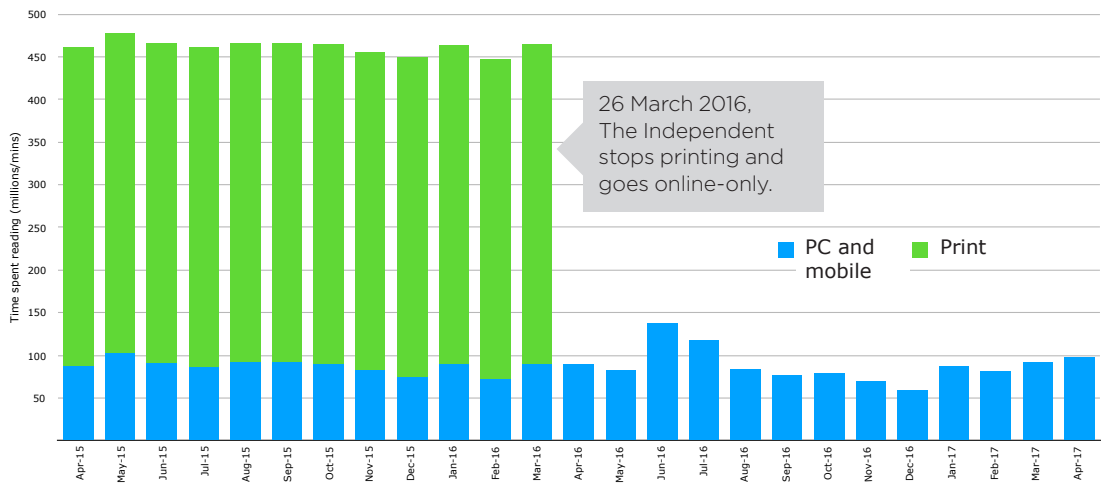
* For the period April 2015 to March 2016 a multi-platform reader is defined as one who read The Independent via print and PC, or print and mobile, or print, PC, and mobile, or PC and mobile. For the period April 2016 to March 2017 a multi-platform reader is defined as one who read The Independent via PC and mobile. Source: NRS PADD.

Was the increase a consequence of the switch? Evgeny Lebedev, The Independent's owner, seemed to think so, stating that the brand had become more flexible and digitally focused and could now better serve its online audience (Bond, 2016).

However, there is evidence that suggests the rise in mobile-only readers may be reflective not of the brand's new digital focus but of a wider trend. Brands with one foot in digital and one foot in print saw similar growth. In the same period, the Mirror, for example, saw a rise in mobile-only readers of 35 %, and The Telegraph of 24 %.

Furthermore, the increase in monthly reach does not tell the whole story about the paper's post-print popularity, because the fleeting nature of online attention made itself felt. While The Independent's print issues were read for between 37 minutes (for weekday editions) and 50 minutes (for Sunday editions), its UK online readers read, on average, for less than 5 minutes a month. This meant a dramatic drop in the attention received by The Independent from its British audience in the 12 months after the switch. In the 12 months before the switch, its print editions were responsible for 81 % of the time spent with the brand by its British readers, and the online editions 19 %. After the switch, the online attention barely changed, though it showed a brief rise during the Brexit vote and its aftermath, as happened at other UK news sites. The fall in total attention experienced by the brand after the switch was 81 % (see Figure 5).

FIGURE 5: Changes in the total attention (measured by time spent reading) received by The Independent from its British audience before and after it went online-only.



Figures are for readers aged 15+. Print reading time is a monthly average for the period April 2015–March 2016. Online reading time includes both independent.co.uk and indy100/i100. Sources: NRS and comScore.

There was better news, however, when it came to international traffic. The Independent's management, on announcing the decision to go online-only, had talked of their "global ambitions" (Sweney and Johnston, 2016), and after the switch there was more growth (about 50 %) in online traffic from overseas than from the home market, despite the fact that the print product was already unavailable overseas. This may indicate that the company's intention to use their new status as the basis for greater international success is bearing fruit. Though it may also point to the brand's historically strong following in the US and its pronounced anti-Trump stance (Independent, 2016), which is likely to have proven more

popular in the polarised US media market (see, e.g., Fletcher, 2017b) than the ambiguous stance adopted by a paper such as The Telegraph (see, e.g., Telegraph, 2016).

The reasons behind The Independent's international improvement are debatable, but what isn't debatable is that the fall in overall attention received by the brand from its home audience was large. Does this matter? The fact remains that the move to online-only has allowed the brand to make huge savings in distribution costs and become profitable. Some commentators have suggested that this profitability may have come at a price. Amol Rajan (2017), a former editor of The Independent, worries that the paper's absence from the newsstand has resulted in lost influence. If influence is, in part, a function of how much attention a newspaper brand can attract, then that is certainly the case. The Independent has more readers now, but few of them are devotees, and the brand is a thing more glanced at, it would seem, than pored over. In its diminished visibility it resembles a lifeboat dwarfed by the liner that has just been evacuated. Sustainability has been achieved at the cost of prominence.

4.6 Conclusion

Does time reveal all, as François Rabelais would have it, or, to quote Thomas Mann, have the more modest effect of clarifying? For newspapers, the time-spent metric does the latter, helping dispel misconceptions about the extent to which digital distribution can engage readers and substitute for the medium of newsprint. It does not reveal everything about reader behaviour, for instance all an advertiser might want to know. Although, as has been mentioned, there is some evidence of a correlation between time spent with a medium and awareness of the advertising within (Petric et al., 2017), more evidence is required. Time spent cannot record whether a reader takes action, an important consideration, especially in pay-per-click advertising. There are also considerable technical obstacles to measuring, with sufficient rapidity and consistency, time spent across all advertising media. For those reasons, David Bassett and Andrew Green's (2015) proposal that visual attention should become a tradable advertising currency – "Gross Engagement Minutes" – remains on the drawing board.

Nevertheless, the loyalty and attentiveness of print readers, and the consequent visibility of newsprint as an editorial and advertising medium, is something that many have overlooked in the dash to digital. Advertisers should be mindful of this fact as they appraise the respective merits of paper and digital platforms

as advertising vehicles, especially given the recent revelations about Facebook's exaggerated claims regarding its own reach (Lee, 2017) and the time users spend on the platform (Vranica and Marshall, 2016).

Advertising is, of course, not the only – and no longer the primary – source of revenue for newspapers. Since 2013, audiences have generated more revenue for news publishers around the world than advertisers (WAN-IFRA, 2017), and their contribution is growing. For some publishers in the Anglosphere, our politically turbulent times have been particularly financially fruitful. In 2017 the New York Times Company earned more than $1 billion in subscription revenue and reported "'continued strong retention' among the users who subscribed to The Times amid the 2016 presidential election" (Ember, 2018). In the 12 months to October 2017, The Guardian more than doubled its regular paying supporter base (GNM, 2017). These increases in audience revenues likely have less to do with the time audience members are spending with those brands than with gestures of support for their ambitions to "hold power to account" (NYT, 2018) and "keep the powerful honest" (Guardian, n.d.). Both Brexit and Trump will pass, however, and when they do, recruiting and retaining paying subscribers may become more difficult. As the Financial Times has said, "time-based metrics value quality content over quantity, real reader engagement over clicks" (FT.com, 2015), and it is engaging, quality content that will be an important consideration for sustaining subscribers and supporters in the long term.

If we maintain the product perspective for a moment, the results presented here are a reminder not to throw the baby out with the bathwater. Publishers should take inspiration from print's unrivalled ability to engage; from its design cues, which have been refined over centuries; and from the contained experience and sense of completion it gives. It is not coincidental that information on paper makes deeper impressions (see, e.g., Mangen and Kuiken, 2014) and is easier to recall (see, e.g., Mangen et al., 2014).

How generalisable are the results from the small sample studied here to news brands elsewhere? The newspapers analysed in this essay operate in the UK's highly competitive and relatively well-resourced national market.[3] They are large operations that cover a country – and a city – that is politically, economically, and culturally of global importance, and have the advantage of publish-

3 With the exception of the Standard, which, although strictly a metropolitan newspaper, serves a population of over eight million, larger than Austria's.

ing in English, the world's de facto lingua franca. Consequently, their online editions – particularly those of The Mail and The Guardian – are some of the most successful anywhere. Furthermore, the UK has a lower level of weekly print readership than in many other countries,[4] perhaps a result of the fact that newspapers tend to be acquired on impulse, picked or purchased at newsstands rather than via a subscription arrangement.[5] For these reasons, I would expect the gap between the time spent with newspapers' print and online editions to be even greater in many other markets.

4.7 Acknowledgements

This chapter is derived in part from two articles published in Journalism Studies in February and December 2017 and one article published in Digital Journalism in September 2018 copyright Taylor and Francis, available online:

- http://www.tandfonline.com/10.1080/1461670X.2017.1279028
- http://www.tandfonline.com/10.1080/1461670X.2017.1397532
- http://www.tandfonline.com/10.1080/21670811.2018.1504625

I would like to thank Richard Fletcher and John Hobart for their contributions to this essay.

4 For example, in the 2016 Reuters Digital News Survey, weekly print newspaper readership in the UK was 58 %, compared with an average, across 26 countries, of 65 %, ranking it in the bottom third.

5 In Denmark, Finland, and Norway in 2014, subscribed copy sales represented, respectively, 88 %, 88 %, and 86 % of daily newspaper sales (Nordicom, 2017).

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4.9 About the author

Dr. Neil Thurman is Professor of Communication in the Department of Communication Studies and Media Research, LMU Munich.

Dr. Thurman's research focuses on the changes taking place in news production and consumption as a result of the internet. It has been covered by media outlets including the Wall Street Journal, The Guardian, and Le Figaro, and been honoured by the International Symposium on Online Journalism in Austin, Texas, where he won "best paper" for four consecutive years.

His website is found at http://neilthurman.com.

He is on Twitter: @neilthurman.

5. Expert opinions

What international newspaper experts think about the study

How do insiders from the international newspaper industry judge the findings of the study, which is based on data from the UK, and how are they affected by the competition between print and digital?

You will find the answers of the experts we interviewed on the following pages. While these undoubtedly do not provide a representative picture of the prevailing opinion and mood, they do show the different conditions in various countries as well as the range of reactions.

In order to give a better overview, we have summarised the experts' replies to each of our six questions.

These publishing experts answered our questions

David Bassett

David Bassett, Director of Analytics, Lumen Research Ltd., Netherlands

Andreas Gierth

Andreas Gierth, Director of Production, Frankfurter Allgemeine Zeitung (F.A.Z.), Germany. He is a member of the WPF Board.

Iris Chyi (Ph.D.)

Iris Chyi, Associate Professor at the School of Journalism, University of Texas at Austin, USA; irischyi.com

Andrew Green

Andrew Green, Global Head of Audience Solutions, Ipsos Connect, United Kingdom

Max Garrido

Max Garrido, Managing Director, Corporation Bermont, Madrid, Spain. He is a member of the WPF Board.

Menno Jansen

Menno Jansen, Chairman, Q.I. Press Controls, EAE Engineering Automation Electronics, Oosterhout, Netherlands. He is a member of the WPF Board.

Ulbe Jelluma

Ulbe Jelluma, Managing Director/Print Evangelist, Print Power Europe, Brussels, Belgium

Ted Young

Ted Young, Editor, Metro, London, UK

Rainer Kirschke

Rainer Kirschke, Marketing Manager Newspaper, Agfa Graphics, Belgium. Mr. Kirschke is a member of the WPF Board.

5.1 "Ads in print are far more likely to be recalled."

QUESTION 1:

THIS STUDY FINDS THAT THE TIME SPENT WITH THE NEWSPAPERS ANALYSED WAS FAR HIGHER IN PRINT THAN ONLINE. DOES YOUR OWN EXPERIENCE MIRROR THIS RESULT, OR HAVE YOU OBSERVED SOMETHING DIFFERENT?

David Bassett (Lumen Research): Lumen's research focuses on using eye tracking to measure where print readers and website visitors direct their attention, rather than on measuring the aggregate time spent per se. Nonetheless, our data broadly supports the finding that engagement with newspapers is deeper than online – especially with regard to time spent with the advertising. Overall, we actually find that dwell times on pages are remarkably similar for print and digital, averaging 26 seconds for a page impression on our passive desktop eye tracking panel, and 27 seconds across a double-page spread in our lab-based press studies. The biggest divergence comes in the attention paid to advertising – in print, 74 % of ads are seen, for an average of 2.1 seconds, compared to just 14 % of digital ad impressions (23 % of "viewable" impressions), for an average of just 1.2 seconds. The greater likelihood of advertising being noticed, and the longer spent viewing, means ads in print are far more likely to be recalled.

Iris Chyi (University of Texas): In the US context, reports on the gap between time spent on print and digital newspapers present similar patterns. In both 2009 and 2010, Martin Langeveld, a veteran in the daily newspaper industry, estimated that about 97 % of time spent with newspaper content was in print, and only 3 % was online. In 2013, McKinsey and Company reported that 92 % of the time spent on news consumption was on legacy platforms: 41 % on TV, 35 % on newspapers and magazines, 16 % on radio and other audio, 4 % on computers, and 2 % on smartphones and tablets each. Such figures seemed unrealistic, primarily because most media reports and press releases emphasise digital growth.

But the print–online performance gap is deep and wide, as evidenced by recent research on newspapers' multi-platform readership. Analysing 51 US newspapers' 2015 readership data collected by Nielsen Scarborough, Chyi and Tenenboim revealed that these papers' print editions reached far more readers than the digital editions in these newspapers' home markets – 28.8 % versus 10 %. (Note that "readership" as a metric, as suggested by Thurman, indeed flatters digital performance.)

The latest report on time spent on newspaper sites is shocking. According to the Pew Research Center, average time per visit for the top 50 US daily newspapers' websites in 2016 was less than two and a half minutes, dropping 5 % from 2015.

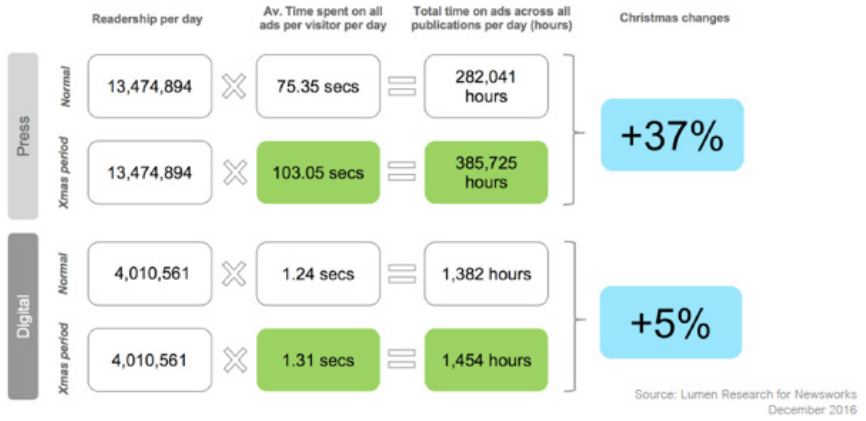
Andreas Gierth (Frankfurter Allgemeine Zeitung): In Germany there exists (as yet) no study that reveals daily media use in minutes across all distribution channels. For that reason, we cannot confirm the results of the study. While our internal market research – though based on different data sources and survey methods – indicates that the print products are used for longer time periods, the difference is not as great as described in Professor Thurman's essay, and the differences between the printed newspaper and the E-paper again differ in degree. Consequently, future research should distinguish between paid-for and free digital offerings.

Andrew Green (Ipsos Connect): The broad conclusion of the article – that time spent reading printed editions far exceeds time spent reading newspaper content online – makes perfect sense and is clear in the figures. But it is important to note, I believe, that the methods used to calculate time spent are very different for print and online. Much is made of the difference between passive and recall methods for measuring time spent reading online, concluding that recall methods overstate time spent. But that remains the method used to measure time spent reading printed copies – and therefore may also under- or overestimate time spent reading these editions (I am not aware of any data pointing one way or the other on this).

Menno Jansen (Q.I. Press Controls, EAE): This is not a big surprise. If I look at the younger generation, they consume news in a different way than the generation aged 50-plus. The fact remains that printed newspaper circulation is declining and digital reading is increasing.

Ulbe Jelluma (Print Power): The data on time spent on print versus digital is confirmed by research done by Lumen in the UK. They checked the time spent on all advertisements per visitor per day. If this can be considered an indicator of the overall time spent with newspapers, it proves the point. The printed advertisements have 75.35 seconds of attention/visitor a day, whereas the digital advertisements have only 1.24 seconds of attention/visitor a day.

Go beyond Platform into Brand Power



Rainer Kirschke (Agfa): Agfa Graphics developed a mobile publishing solution over a period of seven years. This mobile solution delivered content to smartphone apps, tablet apps, and web editions in a highly automated way. Based on our customers and the reader behaviour of their subscribers, we can confirm that the time spent on tablet apps was shorter than the time spent on printed newspapers, and the time spent on smartphone apps was shorter than the time spent on tablet apps. With our mobile publishing solution, we were able to track and measure every single step readers took through each digital edition.

Ted Young (Metro, UK): We estimate that the average reader spends 20 minutes with our paper on their commute into work. But recently we have been looking at our digital app, which is basically the paper for those readers who can't get to a station to pick it up.

The average time spent on our digital editions per day is 35 minutes; that's up from 30 minutes last year. The average morning reader takes 25 minutes to read the digital edition, and the average evening reader takes 18 minutes on the afternoon digital edition. (Not everyone will read both the morning and the evening digital editions. That's why the two numbers don't add up to the 35-minute daily average.) The average number of pages a user looks at in the digital version of the paper per day is 50.

Most news websites won't report their dwell/session times because they'll be very low, so it's hard to find industry benchmarks. A lot of their traffic will be coming in from Google, so the reader will be in and out the door very quickly, probably not even taking in what website they're on.

5.2 "Visual attention is the best measure of reader engagement."

QUESTION 2:

HOW CAN READER ENGAGEMENT BE MEASURED PRACTICALLY AND COMPREHENSIVELY? HOW DO YOU ASSESS THE IMPORTANCE OF TIME SPENT IN THE MEASUREMENT OF THE PERFORMANCE OF A PUBLICATION?

David Bassett (Lumen Research): Lumen believe visual attention is the best measure of reader engagement. It provides a natural means to quantify the value exchange between publishers and advertisers, is stable over repeated studies, and can be applied across platforms and devices as well as other media. It is unlikely (and, in fact, undesirable) that eye tracking will become ubiquitous to the extent that visual attention could be measured across entire populations, but the technology is becoming sufficiently scalable for panels to provide indices of how effectively different publishers and channels convert their audience's attention into engagement with advertising.

Overall time spent reading is a critical driver of performance for advertisers. The longer readers spend with content, the more likely they are to notice the advertising and engage with it for long enough for branded messages to land. Overall time spent does have some important limitations, however; it is not at all clear how to aggregate its value across different readers. Is it better to have two readers who each spend 30 minutes, or one who spends an hour? For all that we accept that reach figures currently inflate the value of digital compared to print, and time spent is a useful corrective, we are not sure that, on its own, time spent can provide full illumination. It's our belief that something like "attention weighted reach" would provide a more fruitful metric, certainly for advertisers. Ultimately, though, metrics ought to be assessed on their usefulness to particular ends; it's likely different publishers will prioritise reach and time spent in different ways, depending on their overall strategy.

Iris Chyi (University of Texas): Time spent is definitely one of the most precise measures of media use and should complement other measures used in audience research such as reach (percentage of readers reached in a market), readership (number of readers), and online measures such as unique visitors, visits, and page views, because reader engagement is a multi-faceted concept. For example,

Zheng, Chyi, and Kaufhold proposed a model for measuring online attention in five dimensions: visibility, popularity, loyalty, depth, and stickiness.

Technically, measuring time spent on a print publication is not easy and the researcher may have to rely on self-reports. In the case of time spent reading digital and print newspapers, different studies using different measures reached the same conclusion: the supposedly dying print edition still outperforms the supposedly promising digital edition by a wide margin.

Max Garrido (Bermont): Time spent reading certainly is a very good approach to engagement, and therefore to the performance of a publication, and I believe it is worth being used by publishers with print editions, although it is with print editions that the measurement of time spent becomes more costly.

Andreas Gierth (Frankfurter Allgemeine Zeitung): Time spent reading is undoubtedly an important indicator of the intensity of media consumption. In addition, it would be important to evaluate the cognitive and emotional quality of the media product, for example by means of complementary consumer surveys or instrument-based tests, as offered by neuronal research.

Andrew Green (Ipsos Connect): Gross "Opportunities to See (OTS)" and net reach are not sufficient surrogates in themselves for advertising exposure or effectiveness, although they have long been the most practical metrics to use as "currencies" to trade advertising space across all media, including newspapers. Several in-depth studies of reader engagement have been carried out in the UK, looking at areas such as time spent reading, the parts of a publication people claim to read, the proportion of a title they read, the importance of a newspaper or magazine in their lives, and whether they notice advertising. The studies were not continued because they were rarely used by media buyers or sellers, suggesting that even if a practical and comprehensive set of engagement metrics could be pulled together, it may not be a financially viable exercise. The most promising way of gauging reader engagement with advertising – the key goal of marketers – is to use eye tracking to compute the length of time people actually fixate on an advertising message. This could be done at scale if the market were willing to pay for it. But thus far there are no signs that it is prepared to do so. As with the time spent reading metric, there are limitations in how accurately it can be executed for printed newspapers (which must be read online for the eye tracking technology to work).

Menno Jansen (Q.I. Press Controls, EAE): Reader engagement is very subjective. It is more about brand loyalty. Today's economy is not how long you "stay", but how frequently you visit (engage).

Ulbe Jelluma (Print Power): The Print Power focus is that of attention for an advertisement in a printed newspaper. As we promote the use of advertising in print media, time spent focused on advertisements is a key metric. However, this is hardly used for advertising planning purposes, as it doesn't seem to be operational yet. One of the pressing questions today is to differentiate between the printed and the online readership of news brands. In that discussion, the time spent criterion is going to become more important.

Rainer Kirschke (Agfa): We measured in real time each activity and time spent on individual articles. Nevertheless, we cannot measure whether the reader was really reading the content in a focused way or did something else at the same time without reading the content. That means we cannot check mental concentration while digital content is consumed. Based on the analysis of which content is most read, our customers were able to move the most attractive content to new strategic positions in the digital products, which increased the attractiveness of those products.

5.3 "Newspaper readers are anything but platform-agnostic."

QUESTION 3:

WHAT IS YOUR VIEW OF THE STUDY'S FINDING THAT THE READING TIME OF PRINTED NEWSPAPERS EXCEEDS THAT OF THEIR ONLINE EDITIONS? WHAT ARE THE REASONS FOR THE DIFFERENT READING BEHAVIOURS IN PRINT AND DIGITAL?

David Bassett (Lumen Research): Interestingly, we find reader behaviour is remarkably similar across print and digital for individual articles; their time spent is principally determined by how interested they are in the article. However, digital environments are much more attention-competitive than newspapers – it is much more likely that readers will be distracted away from the publication into other things online. Although our research remains at an early stage, it seems mobile engagement is somewhat richer, deeper, and more focused than desktop.

Iris Chyi (University of Texas): Twenty years of audience research suggests that newspaper readers are anything but platform-agnostic. Their attachment to the print edition is stronger than expected, and their response to newspapers' digital products is lukewarm at best. My research shows that online news is an inferior good, like instant noodles or fast food. The print newspaper, in contrast, is a normal good, like steak or a home-cooked meal. This so-called "Ramen Noodles Theory" suggests that online and print newspapers are perceived and consumed in fundamentally different ways.

Regarding why digital news is so poorly received, three types of explanation exist. First, the screen-based reading experience is not pleasant to begin with, and most newspaper sites are characterised by cluttered design and an ever-increasing level of annoyance. Second, readers may perceive the online edition as inferior simply because it has been offered for free for well over a decade. This may sound like an obscure explanation, but behavioural economists have confirmed that the price of a product has a tremendous impact on perceived product quality. Finally, empirical research shows that human brains generally respond more favourably to tangible materials.

Max Garrido (Bermont): I believe that the findings of the study make sense. What is the reader looking for when buying a printed newspaper? And when accessing a digital newspaper? The simple fact of going to a newsstand to buy a newspaper or paying for a subscription (this also applies for paid digital subscriptions) shows a commitment to reading. Nowadays everybody has free access to online news, so the individual who has made a choice to read a printed newspaper has a clear interest in it. Apart from that, there are other reasons for longer time spent on a printed newspaper than on its online edition, such as fewer distractions, more relaxed/comfortable reading, and mental allocation of higher value to a physical product, especially if a price has been paid for it. Time spent online is usually more fragmented, with the reader getting information from several different online sources.

Andreas Gierth (Frankfurter Allgemeine Zeitung): In our opinion, the printed newspaper (or its E-paper version) is a self-contained edition that is usually consumed in a classical "lean back" situation. Factors such as habitual daily routine, escapism, etc. play a part here. The reader retreats behind the newspaper.

In contrast, the consumption of free news websites tends to be more selective. For example, they are used for keeping up to date with the latest developments via a constant news stream running across the screen. This frequently takes the form of a parallel process, e. g. they are used while working in the office or commuting on public transport. Accordingly, the recipient is more likely to be disturbed during the consumption process compared to when reading the paper edition.

Andrew Green (Ipsos Connect): The figures are very clear that people spend far more time reading printed newspapers than they do reading them online. I believe the reasons are based around the different situations in which people read (and many people, of course, read both in print and online). Reading a printed newspaper is usually a planned event – such as in the morning at breakfast, on the train, or in the office. For this, people have usually set aside chunks of time for reading. Digital reading is often unplanned – stealing a moment at any point of the day or reacting to a notification. So it is likely to be much shorter.

Menno Jansen (Q.I. Press Controls, EAE): This is very simple to answer. Instant news can be read online within seconds. So the headlines will be accessible instantaneously online. Background news can be read from a printed newspaper. I would prefer the word "consumed". Make the comparison with a fast-food restaurant and luxury dining. If you are hungry you can eat something quickly from a fast-food restaurant. It is easily accessible, cheap, and you know what you will get. On the other hand you can go out to a nice restaurant, sit down, relax, and enjoy … and that's the way I see a printed newspaper. You sit down and relax, and get background information and enjoy the experience.

Ulbe Jelluma (Print Power): Each channel has its own internal use patterns. For example, response times are different depending on the channel used. A printed letter is perceived as an important message, which, however, doesn't need to be responded to on the spot. A text message, on the other hand, needs answering "in the moment" and an e-mail question should be answered in an hour. This is also true for printed and online reading. You take your time to read a printed newspaper. Each page shows you various subjects of interest. Not only do you actively search for the articles relating to your interests: you might also "bump into" articles that you think are interesting but that are not on your "search" list. Online reading, because of the device, is a different experience. The phone is a device for getting up to date, for getting the latest news. The reader won't

take some time out to read an article. Reading is often part of multi-tasking or sequential-tasking: quickly changing between tasks. This reading behaviour of course influences the time and the attention with a device or channel.

Rainer Kirschke (Agfa): The human being, the newspaper reader, has, for a long time, been used to navigating through printed newspaper sections, pages, and layout. The freedom to choose between sections and the discovery of new themes and topics are benefits of printed content. Our own mobile publishing solution focused from the beginning on an HTML5-based display of digital content on tablets and smartphones. Device-independent readability (especially on smartphones) was our background for that decision. We learned at that time that most of the publishers we talked to were not prepared (or eager) to leave the track of the established print layout and structure. Most of them preferred the classic digital E-paper, which is hard to condense to an iPad size if the print format is based on Nordisch/Berliner/Rhenish format. We even had customers who started with HTML apps and changed the style to a hybrid E-paper design after a while.

Single clickable articles combined with the digital E-paper print layout produced some improvements in readability on tablets. It was also interesting to see that well-established digital newspaper products enriched their content with picture galleries, videos, and interactive tools at the beginning of the new launch, but that now, after five years in the market, have decreased this enrichment drastically.

Many publishers are increasingly failing to take advantage of such elements in the examples we see today. Another experience that we concerned ourselves with was the integration of digital advertisements in newspaper apps. Only in a few cases did publishers make use of the opportunity to increase attractiveness via HTML5-based ads or interactive ads.

Mainly, the print bitmap file was used for digital ads. Overall, aside from a few exceptions where digital newspaper products are very successfully established in the market, the strength of the printed newspaper is not surprising.

5.4 "Adverts in printed newspapers are talked about at the coffee machine."

QUESTION 4:

IF READING TIMES IN PRINT AND DIGITAL ARE SO DIFFERENT, WHAT CONCLUSIONS SHOULD NEWSPAPER PUBLISHERS DRAW FOR THEIR BUSINESS STRATEGIES?

David Bassett (Lumen Research): Two things: firstly, they should carry on promoting print as a medium, and fight hard to justify the premiums they charge for printed ads based on attention.

Secondly, they should make their websites more like their paper versions: simpler design, with an intuitive visual hierarchy; bigger ads, optimised to be viewable for longer. Modern news-brand websites seem to take their cues from eBay, or slightly old-fashioned versions of their own printed versions: lots and lots of articles, with limited direction on what to read first, second, and third. Instead, they should be building their own new visual language, which helps people navigate the site (and be exposed to advertising in an appropriate manner). The key to this is to understand that everything doesn't have to be the same size.

Iris Chyi (University of Texas): For any media business, usage is the foundation for advertising and subscription revenue. Neil Thurman's study once again revealed that the usage problem accounts for newspapers' long-time difficulties in monetising online content. Newspaper publishers may blame the oversupply of online information and the dominance of Google and Facebook in the advertising market, but they may as well drop their unrealistic digital dreams and refocus on print, where their competitive advantage lies.

The fact is that most US metro newspapers still reach one third (33.3 %) of the population in their local market, and most (86 %) of these readers are still reading the print edition. The declines over time are real, but, in the meantime, almost all major newspapers in the US have raised the price of their print product dramatically. It now costs an average of $500 to get a one-year subscription, up from about $200 in 2008. Yet such an expensive "dead-tree" edition remains the most-used newspaper product above all.

Max Garrido (Bermont): Publishers should avoid comparing reader/user numbers in print and online as if they were fully equivalent, and they should make co-ordinated efforts to explain that difference to advertising agencies. Readers of print editions might have become a minority of the whole number of "users" of a newspaper, but they have some characteristics, including this specific one of time spent reading, that make them very valuable.

Andreas Gierth (Frankfurter Allgemeine Zeitung): For newspaper publishers, the logical approach would seem to be to use the value chain "free articles on the website – pay-for articles behind the paywall – (digital) trial subscription – (digital) full subscription", to attract new, loyal readers.

Andrew Green (Ipsos Connect): They should certainly not forget print as quickly as many seem to be doing. As Iris Chyi has noted in her study of US newspaper reading: print is still strong today, even if the future sees a continuing trend towards reading digitally. So advertisers should use newspapers while they are still effective, instead of placing their bets on a yet-to-emerge "future". Bob Hoffman has argued that more than half of US consumer power comes from the over-50s – who certainly have a greater propensity to read in print than younger people – while only 10 % of marketing spend is targeted at them. So publishers should live in the present, as well as in the future.

Menno Jansen (Q.I. Press Controls, EAE): The way they advertise should be different because the audience is different as well. Young people consume information very quickly. Advertisements should be adapted. The news presented online is already completely different from printed news.

Ulbe Jelluma (Print Power): We've recently seen in the UK that a number of companies and organisations use printed newspapers to respond to bad news. Oxfam, KFC, and Facebook all made public apologies in printed newspapers. Adverts in printed newspapers are talked about at the coffee machine. People notice them and expect others also to have seen them, and start discussing them. With the overall presence of digital news we tend to forget the continued important role of printed newspapers. A full-page advert in a printed newspaper can't be overlooked, and when the message is expressed like KFC's, it is beneficial for the brand. Publishers strongly believe in the role of their digital brands, but they should not underestimate the value of the printed newspaper for brands. Research has shown that brands that have stopped advertising in print tend to fall short in brand salience. Print media advertising supports the salience of brands.

Rainer Kirschke (Agfa): The focus on delivering attractive content by means of printed newspapers to readers over the age of 18 should be continued. The bigger challenge is the generation under the age of 18 and how to attract their attention to journalistic content in the future. This generation has no affinity to classic newspaper brands. This calls for the courage to create new products, new content style, and new sales models.

5.5 "Publishers should give their print product the required attention."

QUESTION 5:

THE STUDY MENTIONS PRINT'S UNRIVALLED ABILITY TO ENGAGE PEOPLE BECAUSE OF ITS DESIGN CUES, CONTAINED EXPERIENCE, AND THE SENSE OF COMPLETION IT GIVES. IT ALSO CITES EVIDENCE THAT INFORMATION ON PAPER MAKES DEEPER IMPRESSIONS AND IS EASIER TO RECALL. WHAT CAN PUBLISHERS DO TO CONVINCE ADVERTISERS OF THE STRENGTHS OF THE PRINTED NEWSPAPER?

David Bassett (Lumen Research): Like the author, we believe the conversation needs to be moved away from brute reach metrics. Digital ad impressions are of such hugely varied quality (not to mention issues of fraud and viewability) that it is extremely misleading to compare them to well-established survey-based readership figures. On its own, though, time spent may not do much to move the dial. Mary Meeker's famous "time spent" charts have been making the case for budget shifts from print to online, rather than from online to print, for years. While time spent with print holds up better than reach, ultimately it still underestimates the value of print audiences to advertisers. Time spent with a medium can be very misleading – time spent with advertising varies hugely across channels. We find that 7.5 % of time spent with print goes to the advertising, compared to just 1.4 % for desktop digital display.

Iris Chyi (University of Texas): In recent months, a number of industry leaders have been talking about the so-called "(digital) subscription surge" while claiming that advertising would no longer work for newspapers. This is the latest version of their "death narrative" that has convinced almost everyone, including advertisers. So, publishers must first rethink the future of their print product before they can convince anyone.

While print newspapers do not have to die, newspaper publishers may kill them if they continue acting on the misconception of an all-digital future, disinvesting in their print product, and "running around arguing the sky is falling" (Robert Picard). All these will result in further declines in circulation and advertising, which will then be interpreted as further evidence that print is dying.

Max Garrido (Bermont): This study is a good example of what publishers can do. They could promote similar studies on this subject in their own countries and present conclusions to advertisers.

Andreas Gierth (Frankfurter Allgemeine Zeitung): Media agencies are today extremely KPI-driven. They try to cover all questions with statistics, generated preferably from a single (merged) data source. This approach runs up against limitations even in comparatively simple metrics, such as the assumed use of different types of media. It gets really difficult when, as described above, the cognitive, emotional, or habitual characteristics of the audience play a part in the assumed advertising effect. For some years, German advertising marketers, including F.A.Z. Media Solutions, have increasingly focused their attention on this topic.

Andrew Green (Ipsos Connect): Sadly, rational argument is rarely sufficient to change marketing strategies. Of course, every medium can marshal arguments in its own favour and do so through dedicated marketing organisations such as Thinkbox (TV), Radiocentre (radio), FIPP (magazines), and Newsworks (newspapers). Publishers need to convince not only advertisers but also media planners at agencies, most of whom are under the age of 30 and living in a different universe to the people they are targeting. Studies have shown that media decision-makers believe other people use media as they do – i.e. they don't read printed newspapers or magazines and spend much of their time watching Netflix and listening to podcasts. This is demonstrably not true, but remains a strongly held belief. So publishers need a dual strategy: to show that they are digitally ready and fit for the future, but that they also have a strong product today that can help advertisers market their products and services effectively and efficiently.

Menno Jansen (Q.I. Press Controls, EAE): Nowadays the problem is that publishers try to move their customers away from print. If you take a close look, they try to push their readers towards digital with attractive offers including iPads and other nice things to have, so they don't need to print a newspaper any more. The problem starts with believing in print. Once this is gone the business model is gone as well. Quick profit is more important than customer intimacy.

Ulbe Jelluma (Print Power): One of the obvious problems with print advertising, including in newspapers, has to do with the age, interests, and knowledge of the people responsible for planning and buying media. Be they brand owners or advertising and media people, most of them have an inclination towards digital media. Innovation is happening in the digital domain and nobody wants to be associated with "traditional media" that might not be around any more in a few years or decades.

Publishers should give their print product the required attention, express the clear benefits of the printed version, and by doing so change the perception of print. It is difficult for media planners to suggest using print media in the mix because they will need to do a harder sell to brand owners. Even though various advertising practitioners, researchers, and the academic world recommend using print media, the marketing, advertising, and media world hasn't made a major change; they continue to invest a large portion of their budget in online media.

Print Power not only provides reasons for using print advertising; we also make the sell to brand owners easier by informing them about the benefits of print media. Thus, this change of perception needs to be realised among the brand owners *and* the agencies involved.

5.6 "The credibility of the print edition has to be actively exploited."

QUESTION 6:

HOW CAN NEWSPAPER PUBLISHERS CREATE A COHERENT COMBINATION OF PRINT AND ONLINE CHANNELS THAT CONTRIBUTES TO BRANDS' OVERALL STRENGTH?

David Bassett (Lumen Research): Crikey, that's quite a question. Brilliant as print is, it will die eventually. The trick is to take all the embedded wisdom in print design and bring it to a digital environment. Not the actual designs – The Times tried that a while back, and it doesn't work – but the principle of using visual design to promote discovery and education.

Iris Chyi (University of Texas): The online edition may extend the reach of the print product in the long-distance market. Digital channels also may serve as effective and low-cost marketing and customer service tools.

Max Garrido (Bermont): Publishers need to continue learning what readers of print editions and online editions place value on, and adapt the way they present their content accordingly, always maintaining their signs of identity and credibility, regardless of the channel concerned. Cross-channel commercial actions, such as cross-channel subscriptions, contribute to reinforcing the brand strength. In a market where traditional newspaper publishers compete with newly born, digital-only news products and social media, the perception of credibility that the print edition maintains is an asset that must be actively exploited among the readers of its digital editions.

Andreas Gierth (Frankfurter Allgemeine Zeitung): The most important thing first: a harmonious connection between printed and online editions is achieved above all by a recognisable journalistic signature that runs through all of a media brand's products. On the publisher's side, this is usefully complemented by measures such as a uniform corporate identity on all channels, digital add-on offerings for print subscribers, etc.

Andrew Green (Ipsos Connect): First, they must want to do it! Throughout the advertising business, there has been a heavy emphasis in recent years on how things will be "tomorrow", with the unfortunate side-effect that "today" is being ignored. This is true of other media (for example, linear TV's audience far exceeds the audience for OTT television and the like); it is true of targeting (an over-emphasis on marketing to millennials, rather than to the people actually buying). Also, there is an obsession with "data" rather than with survey information (these can complement each other well, rather than being either/or options). So it is important to want to do this. Collecting and packaging the data is a relatively easy task in comparison!

Menno Jansen (Q.I. Press Controls, EAE): I am not in the newspaper publishing business, but an entrepreneur in optical measurement and control equipment for the graphics industry. Print and online can go hand-in-hand. Why not? You can have a fast-food restaurant next to a two-star Michelin restaurant. Both serve food, though in completely different ways.

Ulbe Jelluma (Print Power): As data about print readership and digital readership increasingly becomes available, publishers will be able to more precisely target brand owners for these different products – and sometime sell them both versions. I would not recommend selling only the combination. Again, research shows that adding print to the media mix (with TV and/or online) increases the overall effectiveness of the plan. When evaluating a media plan it should become clear what the contribution of print and/or online will be. Deciding whether to combine the two versions depends purely on this evaluation.

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ISBN 978-3-00-059866-1