UGC: FRIEND OR FOE?

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The news industry is being transformed. Technology, and people's use of it, is re-shaping the industry, and forcing a change to the business models of newspaper publishers in particular. Much remains to be done in adapting business models to reflect the new realities; however life has changed forever.

From the editorial perspective, in the new world consumers are no longer passive recipients of news coverage. They can play an interactive role in how news is distributed, commented upon and interpreted. In its different forms User-Generated Content, or UGC, is now a major part of the landscape.

Is this good news or bad news for newspapers? Is UGC friend or foe? Some hold that it's bad news for publishers, as it means a diminution of influence and of commercial opportunity. This paper takes the view that newspapers ought to encourage and engage with the providers of UGC. They should embrace it, and use it as a means of underpinning their role in the contemporary world.

What is UGC?

We should start with a definition of User-Generated Content, or UGC. Given its nature, it would seem appropriate to draw this from Wikipedia:

"**User generated content** (UGC) covers a range of media content available in a range of modern communications technologies. It entered mainstream usage during 2005 having arisen in web publishing and new media content production circles. Its use for a wide range of applications, including problem processing, news, gossip and research, reflects the expansion of media production through new technologies that are accessible and affordable to the general public. All digital media technologies are included, such as question-answer databases, digital video, blogging, podcasting, forums, review-sites, social networking, mobile phone photography and wikis."

This is a wide definition, but that seems appropriate given the scope of what is currently possible, and the potential for significant further technology-driven development.

The changing role of print media

In some senses, the industry has come full circle. A recent edition of The Economist set out the historical context very neatly.

Until early in the 19th century there was no mechanism for spreading news quickly to large numbers of people. It travelled through conversations in public places (we would now define this as 'Word of Mouth', a communication medium in its own right) and through people writing letters to friends. This went right back to Roman times, with summaries of the '*acta diurna*', the official gazette published in the forum each day. Social networks were the only means of news circulating.

The invention of the printing press allowed more copies of a document to be published more quickly than before, but distribution was still dependent on personal connections. Thus in early 1518 Martin Luther's writings were carried from one town to the next, and spread around Germany in two weeks.

In January 1776 in America, 1,000 copies of Thomas Paine's pamphlet "Common Sense" were printed. These rallied the colonists against the British crown. One copy reached George Washington, who made officers read extracts to their men. By July 1776, around 250,000 people, or half the free population of the colonies, had been exposed to the ideas.

Newspapers at this time had small, local circulations. They had no dedicated reporters, but mixed opinionated writing with readers' contributions and items from other papers. News, gossip, opinion and ideas were exchanged within social circles or communities, with little distinction between producers and consumers of information. To today's producer or consumer of UGC, this may sound familiar. These were social media.

The birth of the traditional newspaper

So even 200 years ago, news travelled by word of mouth or letter, and circulated in taverns and coffee houses in the form of pamphlets, newsletters and broadsides. As one observer noted: "The Coffee houses particularly are very commodious for a free Conversation, and for reading at an easie Rate all manner of printed News".

Everything changed in 1833 when the first mass-audience newspaper, the New York *Sun*, pioneered the use of advertising to reduce the cost of news, thus giving advertisers access to a wider audience. Product manufacturers and service providers now had the ability to reach large numbers of people in one go. This had not previously been possible. At the time of the launch America's bestselling paper sold just 4,500 copies a day; the *Sun*, with its steam press, soon reached 15,000.

The consequence of this development was to turn news from a two-way conversation into a one-way broadcast, with a relatively small number of organisations in each country controlling the media. Newspapers dominated the dissemination of news for around 100 years. Then there emerged other media through which public could be kept in touch with news: first radio, then television. But newspapers developed and survived the challenges.

Around the mid-1990s, the emergence of the internet changed the landscape. It soon came to represent an even greater threat to newspapers in their traditional form. The subsequent torrent of technological developments has presented huge challenges to publishers trying to keep up with the game.

Perhaps most notable of all has been the establishment of social networking sites, and their evolution into a means for consumers not only to share personal updates but contribute to the dissemination of news.

Consumers now have the ability to provide UGC (for example to upload film shot on mobile phones of events in near-real time). Through means such as Twitter, people anywhere can report what they are seeing. Footage from mobile phones of events from street demonstrations to American tornadoes is posted on social networking sites. If judged sufficiently newsworthy, it may be re-broadcast by news organisations.

Those wishing to keep the lid on stories (for example Premier league footballers previously considered as role-models) also have bigger problems than before. Through tweets and re-tweets, word of mouth can circulate like wildfire. Users disseminate it not only to people tagged as 'friends', but to people unknown to them – followers, followers of followers, even followers of followers of followers. If an update is sufficiently compelling in the judgement of those receiving it, they will pass it on in like fashion. Thus social networking sites help people find, discuss and share news with their friends.

The web has also allowed new providers of news to come to prominence, from individual bloggers to sites such as the Huffington Post. People can read newspaper content or watch TV channels from around the world.

Things have changed dramatically in terms of the speed by which news is circulated, and also in terms of its control. This means that we are now at a point where newspapers, at least in their traditional static print form, cannot keep up with the instant news agenda.

So newspapers need to redefine their role.

Alan Rusbridger, editor of The Guardian, is clear on this point. He sees the Guardian's future as being in the digital space. He also sees the role of the print edition as no longer being to provide the latest news, but rather to provide context and opinions. He recently announced that Guardian News and Media, its parent company, would:

"move beyond the newspaper, shifting focus, effort and investment towards digital, because that is our future. Every newspaper is on a journey into some kind of digital future. That doesn't mean getting out of print, but it does require a greater focus of attention, imagination and resource on the various forms that digital future is likely to take. We are continuing to pioneer what we call open journalism – editorial content which is collaborative, linked into and networked with the rest of the web. We will also be changing the printed Monday to Friday newspaper to take account of changing patterns of readership and advertising. Half our readers now read the paper in the evening: they get the breaking news from our website or on mobile"

The social web

With the evolution of the social web, everyone can be an author or news provider by producing their own UGC, should they wish to do so.

As well as challenging the role of print media as news providers, the social web also represent a challenge to their role (and also the role of other paid-for advertising media) as a promotional medium. The social web can impact consumer buying decisions: much more 'information' is available through consumers giving each other feedback. This online "word of mouth" can influence brand preferences and purchases.

Many consumers will actively seek opinions prior to making a purchase. For a high-cost item this is an entirely logical thing to do. A great many opportunities exist to visit review sites for points of view on value-for-money, reliability, and whether a particular purchase might be wise.

We all do this, whether it's consulting a site such as Trip Advisor whilst planning a holiday, or doing background research on a major purchase such as a new car. It's easy to do for low-cost items too. If you want a point of view on a book, a CD, a DVD, or even an individual MP3 track, it's there on Amazon or iTunes. Others have been there and said their piece.

But here is the key question. As a consumer, how do you know whose views are reliable? Who can you trust? This brings us to the fundamental concept of <u>authority</u>.

Books such as "The Cult of the Amateur" argue that the picture is bleak. They describe a world – some would say democratic, others would say nightmarish – in which all opinions are equal, and in which no-one can tell who has authority any more.

And how do we know when to believe what we see on Twitter, and when not to believe it? If you took Twitter at face value on the evening of Tuesday 9th August 2011, you would believe that the Tesco superstore in my town was burned down by a rioting mob on two separate occasions. Happily, it wasn't.

In relation to the recent rioting in some British cities, the writer and broadcaster Andrew Collins wrote on his blog:

"I've spent so much of the last three days watching 24-hour news, I am convinced it is a power for evil rather than good at times like these. Social networking has been a tool for spreading information, but it has also been a tool for organising clean-ups, so it's hard to call for its abolition. We live in a 24-hour culture, but we need reasoned coverage, like the sort you get in newspapers – remember them? – or on evening news programmes, not the endless replaying of the same footage, which gives the impression that a student is having his backpack robbed every 15 minutes, and that a burning building is still burning 24 hours after it was lit."

This is where the opportunity for paid-for media lies. And print media have specific advantages.

When keeping themselves informed about what's going on in the world, whether it be when seeking news updates or especially when it's a matter of forming an opinion, many will look to 'authority media' for help. This is where print media in particular score, with their unique ability to present content in a way that allows consumers to reflect and spend as much time as they choose in doing so.

Similarly, when making purchases, consumers are mostly rational beings who want to make the right choices. They will assess all possible information sources critically. In this regard, print media still have a strong story to tell in promoting their advantages to advertisers. Both the context they offer, and the ability of readers to screen material in or out based on their interests, are powerful benefits.

Even so, print media need to be on the radar around the social web. They need to offer content that will be found interesting by those providing UGC. Additionally, they need to be collaborative and make it easy for UGC providers to link – thereby playing a role in helping people to form their opinions about issues of the moment.

So the answer to the question posed by the title of this paper is that UGC should be a "friend" to the print media, although publishers will have to work hard and continuously in order to take advantage.

Findings from TGI Net studies illustrate the opportunity that exists. For the most part, this paper will draw upon the TGI Net study in Great Britain. Additionally some comparisons will be made with other markets in Europe, Latin America and the Middle East, using data from the TGI Net studies in those markets. Please see the Appendix for descriptions of the TGI Net survey methodologies.

Attitudes and basic behaviour

As observed above, seeking advice online is now normal behaviour. Consumers appreciate having the opportunity to assess other peoples' opinions.

As an example, we can take Great Britain, where the percentage of adults aged 15 and over who have used the internet in the last 12 months is fairly high, at 78%.

We can see from Table 1 that the opportunity to access views from other people is welcomed by a high proportion of people in GB:

- 42% of adults, and 53% of internet users, say they "like to read other people's views online";
- 43% of internet users "value websites that allow input from their users more than those that do not";
- 50% of internet users say that "other people's online opinions help me make decisions about major purchases".

The percentages agreeing with these statements in other countries are also significant. The numbers in GB who value the chance to contribute to websites themselves, and admitting that other people's blogs influence their opinions, are lower but not insubstantial (17% of internet users in both cases).

Table 1

Attitudes towards online contributions: % agreeing with statement

	All Adults	**Internet users (last 4 weeks)**
"I like to read other people's views online"	42%	57%
"I value websites that allow input from their users more than those that do not"	33%	45%
"I value the opportunity to add my own content to a website"	13%	18%
"Other people's blogs influence my own opinions"	13%	18%
"Other people's online opinions help me make decisions about major purchases"	39%	54%

Base: All Adults

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

If we ask consumers about their own behaviours in respect of UGC, activity seems fairly widespread. (Table 2). Among internet users in GB, 14% claim to have submitted some form of review or comment to a website, and 37% to have read UGC from other contributors. 18% have taken part in online discussion in some form.

Previous work has analysed "Word of Mouth" and sought to isolate those people who are most likely to transmit it. (See Polly Carter's paper from the 2007 Worldwide Readership Research Symposium). Given what we know about Word of Mouth 'Champions', it comes as no surprise to observe that this group is more likely to submit contributions to websites: 20% of internet-enabled champions have done so. Additionally they have a greater propensity to read other peoples' online comments – perhaps in order to help fuel their own knowledge and opinions. 46% have read the views of others. Also 29% of Word of Mouth champions have participated in online discussion.

Table 2

User-Generated Content: behaviours in the last 6 months

	All Adults		**Internet users (last 4 weeks)**	
	All Adults	**Word of Mouth 'Champions' (any category)**	**All Adults**	**Word of Mouth 'Champions' (any category)**
Submitted an article or comment to a publicly accessible website	10%	17%	14%	20%
Read an article or comment submitted to a website by a member of the public	27%	40%	37%	46%
Took part in discussion groups or online chat	13%	25%	18%	29%

Base: All Adults

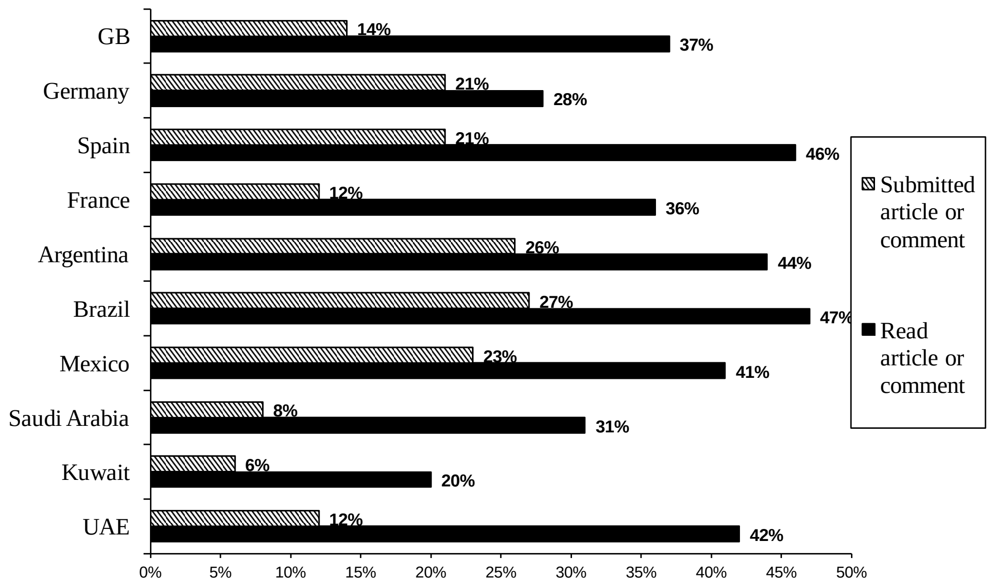
Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

This is not only the case in GB. Looking more widely across the 10 markets in which TGI Net studies are published, we see that levels of engagement with UGC are high everywhere. In all markets, consumers are more likely to read other peoples' UGC than to submit their own, but the most notable observation to be made from this chart is the very significant percentages. Over 40% of internet users in all three of the Latin American markets observed claim to have read UGC in the last six months, as also do over 40% in Spain and the UAE. The numbers contributing their own UGC are lower in all cases, but are still significant – particularly so again in Argentina, Brazil and Mexico. (Chart 1).

Chart 1

User-Generated Content: Country Comparisons

% reading other peoples' and submitting one's own



Base: Internet users in last 4 weeks

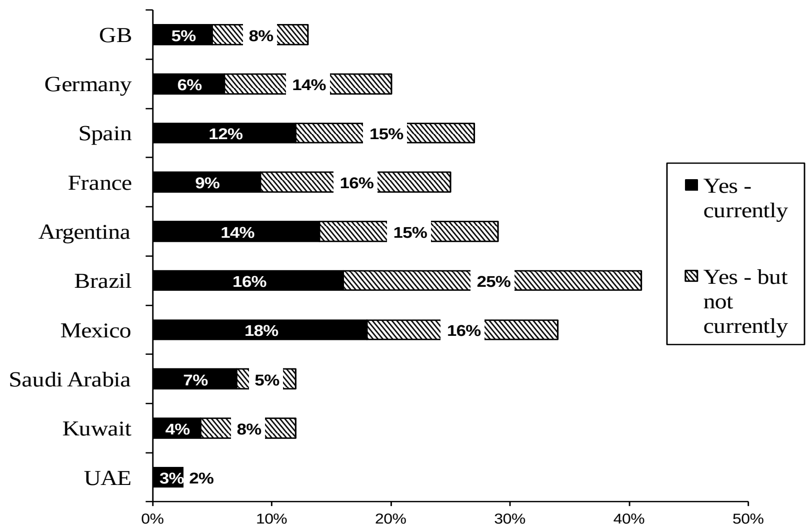
Source: TGI Net studies

Getting involved in the 'blogosphere' is a more intensive behaviour, especially if one is running one's own blog. Hence comparative analysis of blog publishing and viewing is instructive. Chart 2 suggests that levels of blog publishing when considered as a percentage of internet users are highest in Latin America (Argentina, Mexico and – highest of all – Brazil). In Western Europe, Spanish and French internet users show more tendency to blog than their German or British peers. It's also the case that internet users in Saudi Arabia and Kuwait are to be found blogging to an equivalent extent to internet users in GB; citizens of the UAE however are less active.

Chart 2

Blog Publishing: Country Comparisons

% of internet users who publish blogs

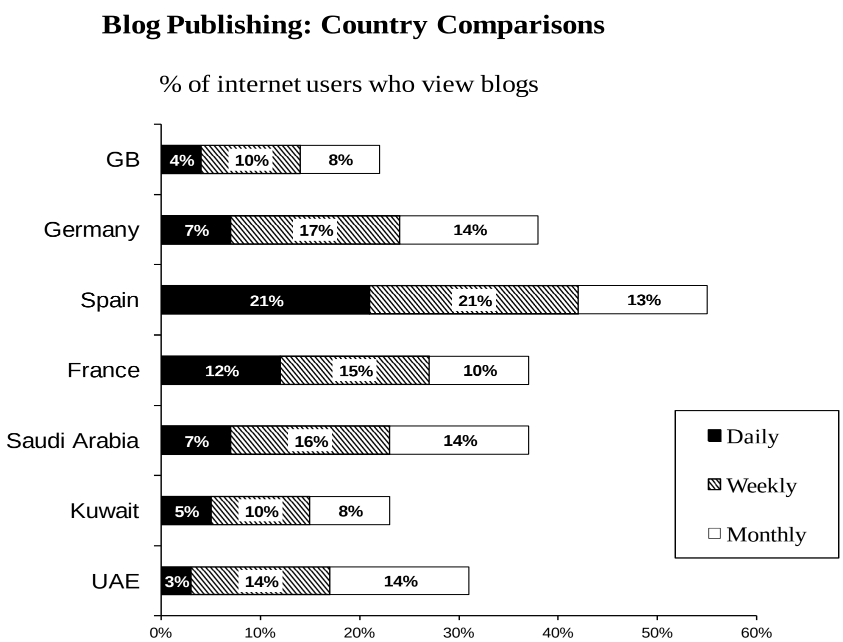


Base: Internet users in last 4 weeks

Source: TGI Net studies

Reading other peoples' blogs requires less commitment, so the numbers observed doing so are higher. Among the Western European countries, Spanish internet users are also the keenest to read other peoples' blogs: over 50% claim to do so on at least a monthly basis, and 21% on a daily basis (Chart 3). There is also a notable appetite for absorbing other peoples' views in Germany, France, Saudi Arabia and the UAE; in all these cases the figure is above 30%.

Chart 3



Base: Internet users in last 4 weeks

Source: TGI Net studies

Focusing again on GB, currently the numbers of consumers who run their own blogs in GB might be considered small, at around 4% of adults, with another 6% having published blogs in the past but not currently being active. Among internet users the figures are 5% and 8% respectively. Even so, this still represents around 1.8 million people currently blogging in GB. (Table 3).

As Table 3 also shows, the group who can be defined as 'Champions' in transmitting Word of Mouth are – unsurprisingly – particularly likely to host their own blogs. 8% choose to communicate in this way currently; a further 13% have done so before now.

Table 3

Blog publishing

	All Adults		**Internet users (last 4 weeks)**	
	All Adults	**Word of Mouth 'Champions' (any category)**	**All Adults**	**Word of Mouth 'Champions' (any category)**
Yes - currently	4%	7%	5%	8%
Yes - but not currently	6%	11%	8%	13%
No	90%	82%	87%	79%

Base: All Adults

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

Similarly, the proportion of people who claim to view other people's blogs with some degree of regularity seems limited: 4% of internet users in GB say they do this on a daily basis, and in aggregate 22% say they do so at least monthly. (Table 4). Once again, Word of Mouth champions are more active than their peers: 31% of internet-enabled champions claim to view other people's blogs on at least a monthly basis, perhaps to help themselves stay informed about their chosen topics.

Table 4

Viewing other people's blogs

	All Adults		**Internet users (last 4 weeks)**	
	All Adults	**Word of Mouth 'Champions' (any category)**	**All Adults**	**Word of Mouth 'Champions' (any category)**
Daily	3%	5%	4%	6%
Weekly	8%	15%	10%	17%
Monthly	6%	9%	8%	10%
Less often / Never	83%	71%	78%	67%

Base: All Adults

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

If we focus on specific web properties, it is notable that claimed usage of the major social networking websites in GB is very high. Just taking the two with the highest profiles at present, Facebook and Twitter, this is clear from Table 5.

Claimed awareness of these two sites is almost universal among the web-enabled. In terms of behaviour, 45% of GB adults, and 60% of internet users, have visited Facebook within the last four weeks; very nearly half of internet users (49%) have visited today or yesterday.

At the time of fieldwork for this wave of TGI Net, Twitter had reached the point where 16% of internet users had visited it in the last four weeks. But with 90% awareness, and a very high media profile, this will surely increase.

Table 5

Leading Social Networking Sites

		All Adults	**Internet users (last 4 weeks)**
Facebook	Aware of	70%	95%
	Ever visited	49%	66%
	Visited within last 4 weeks	45%	60%
	Visited today or yesterday	36%	49%
Twitter	Aware of	66%	90%
	Ever visited	18%	24%
	Visited within last 4 weeks	12%	16%
	Visited today or yesterday	6%	9%

Base: All Adults

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

Where do newspapers fit in?

This evidence suggests, were there any doubt, that social networking websites are here to stay. Consumers are engaging with each other online – with friends and with people unknown to them – on a scale hitherto unimagined.

At the same time, newspapers have not been idle in developing their online presence. In a number of cases, this is being rewarded handsomely by their numbers of online visitors. Table 6 shows that five out of the ten national daily newspapers in the UK achieve over 4 million claimed site visitors over a four-week period, and the same five all achieve over 1 million when 'today or yesterday' visits are asked about.

It's interesting to compare the numbers of site visitors with the numbers of average issue readers to the print editions. The index column on the right of this table shows very clearly that the five 'quality' or 'broadsheet' papers (to use a traditional print term!) which focus largely on serious news and comment, get far higher traffic to their websites in relative terms. For example, the Guardian website achieves over 5 million visitors on a monthly basis, but 1.1 million daily hard-copy readers: thus the index of 477. The Guardian's digital efforts have been high-profile: this suggests they are being rewarded. On the other hand, the tabloid newspaper The Sun has over 50% more hard-copy readers than site visitors in the last four weeks.

Table 6

GB National Newspapers: Websites and Print Editions

	Website				
	Within last 4 weeks ('000)	**Within last 7 days ('000)**	**Today / Yesterday ('000)**	**Print Edition AIR ('000)**	**Index: website 4 weeks vs AIR**
Guardian.co.uk (incl. Observer)	5,264	3,725	1,971	1,103	477
The Sun Online	4,845	3,401	1,833	7,722	63
Telegraph.co.uk	4,524	2,717	1,371	1,680	269
Daily Mail / Mail on Sunday	4,265	2,985	1,713	4,741	90
Times Online	4,049	2,300	1,145	1,565	259
Independent.co.uk	3,230	1,886	732	532	607
Mirror.co.uk	2,790	1,792	792	3,087	90
ft.com	1,892	1,205	638	364	520
Express.co.uk	1,699	1,100	552	1,427	119
Daily Star	1,462	974	494	1,571	93

Base: All Adults

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

We can also look at the extent of duplication between the print and online editions. Given our finding of differential website performance between the quality titles and the popular and mid-market papers, Table 7 separates them into separate groups in order to do this.

Again the success of the Guardian can be observed. Of 1,016,000 internet-enabled Average Issue Readers of the print edition, 350,000 also visited the website within the last 4 weeks: a duplication of 35%.

Overall it's clear that the levels of duplication in general are around twice as high for the quality titles as for their popular and mid-market brethren. This suggests some success on their part in connecting readers between their print and online properties.

Table 7

GB National Newspapers: Print and Website Editions - Duplication

		Print Edition All Adults AIR ('000)	**Print Edition Internet Users AIR ('000)**	**Internet AIR and website in last 4 weeks ('000)**	**Duplication (%)**
Quality	The Guardian	1,103	1,016	350	35%
	Financial Times	364	329	96	29%
	The Times	1,565	1,364	331	24%
	Daily Telegraph	1,680	1,317	302	23%
	The Independent	532	329	73	15%
Popular/Mid-market	Daily Mail	4,741	3,356	583	17%
	The Sun	7,722	5,700	987	17%
	Daily Mirror	3,087	1,997	212	11%
	Daily Express	1,427	957	77	8%
	Daily Star	1,571	1,182	94	8%

Base: All Adults

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

This ability to identify and compare print edition and website readers of the national newspaper titles means that we can also assess their relative potential for getting involved with UGC. We can establish the claimed involvement in UGC (note that this is at the level of the internet in general) by both print edition readers and website visitors. (Table 8).

Looking first at the print editions, readers of four of the five quality titles are strongly engaged with UGC. With the exception of the Daily Telegraph, between 19% and 22% of their readers say that they contribute UGC, making them around 50% more likely than the average adult, or indeed the average reader of the popular and mid-market papers, to do so. They are also more likely to say that they read UGC submitted by others: between 46% and 53% of the readers of these four print editions say this. We can conclude that, as a group, they are active in contributing to public debate.

By contrast, taken as a whole, readers of the print editions of the mid-market and popular papers are no more likely to engage with UGC.

Table 8

GB National Newspapers: Print Edition Readers and Involvement in UGC

		Submitted article or comment to a publicly accessible website		**Read article or comment submitted to a website by a member of the public**	
		%	**Index**	**%**	**Index**
All Internet Users		14%	100	37%	100
Quality	The Independent	22%	160	46%	126
	Financial Times	21%	150	49%	133
	The Times	20%	147	48%	131
	The Guardian	19%	140	53%	143
	Daily Telegraph	14%	104	42%	114
Popular/Mid-market	Daily Express	17%	126	35%	96
	Daily Mail	14%	105	39%	105
	The Sun	14%	101	36%	98
	Daily Star	12%	88	41%	111
	Daily Mirror	10%	73	32%	86

Base: All Internet Users in last 4 weeks

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

Readers of the website editions are even more engaged with UGC in general. In all cases, over 20% claim to have submitted online UGC, and in most cases over 50% claim to have read UGC submitted by others. (Table 9).

In respect of the online editions, the differences between the two groups of titles are much smaller. Readers of the quality titles' websites are only slightly more likely to involve themselves with UGC than readers of the mid-market and popular titles' sites. Indeed, the striking point is how much more engaged with UGC the readers of newspapers' online editions are than the online population in general.

This finding should be very encouraging for publishers. They suggest a large appetite for involvement and interaction among readers of their web editions. This should be considered a significant opportunity.

Table 9

GB National Newspapers: Website Edition Readers and Involvement in UGC

		Submitted article or comment to a publicly accessible website		**Read article or comment submitted to a website by a member of the public**	
		%	**Index**	**%**	**Index**
All Internet Users		14%	100	37%	100
Quality (last 4 weeks)	Independent.co.uk	34%	245	57%	155
	ft.com	33%	240	48%	130
	Telegraph.co.uk	28%	207	57%	156
	Guardian.co.uk	28%	206	57%	155
	Times online	27%	199	57%	154
Popular/Mid-market (last 4 weeks)	Express.co.uk	32%	235	49%	134
	Daily Star	27%	200	44%	121
	Mirror.co.uk	27%	197	54%	147
	Daily Mail / Mail on Sunday	25%	185	52%	142
	The Sun Online	21%	155	50%	137

Base: All Internet Users in last 4 weeks

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

In a similar way, we can see that online readers are more likely than print edition readers to engage with Facebook and Twitter.

Table 10 shows that print edition readers are no more likely than the average GB adult to be Facebook users, and in most cases not much more likely to be Twitter users – albeit with the exception of Financial Times readers.

Table 10

GB National Newspapers: Print Edition Readers active on Facebook and Twitter

		Visited Facebook in last 4 weeks		Visited Twitter in last 4 weeks	
		%	**Index**	**%**	**Index**
All Internet Users		60%	100	16%	100
Quality	Financial Times	70%	115	39%	243
	The Independent	60%	99	21%	133
	The Guardian	59%	98	23%	145
	The Times	53%	88	17%	108
	Daily Telegraph	49%	81	16%	99
Popular/Mid-market	Daily Star	68%	112	22%	137
	The Sun	65%	107	16%	103
	Daily Mirror	61%	101	18%	114
	Daily Mail	50%	83	11%	71
	Daily Express	50%	83	15%	95

Base: All Internet Users in last 4 weeks

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

As we see from Table 11 however, web edition readers are more likely to engage in social networking. In fact, in the case of all the national newspaper sites, a very substantial 70% or more of visitors are active on Facebook. In most cases, including all the quality titles' sites, at least 40% are active on Twitter.

Once again, this points to a big opportunity for newspaper publishers. There is much that could be gained by working continuously on one's social networking strategies, and one's presence on Facebook, Twitter and other sites. The social networking world offers the means to connect and deepen the relationship with current readers, and additionally a way of exposing potential new readers to the offer being provided.

Table 11

GB National Newspapers: Website Edition Readers active on Facebook and Twitter

		Visited Facebook in last 4 weeks		Visited Twitter in last 4 weeks	
		%	**Index**	**%**	**Index**
All Internet Users		60%	100	16%	100
Quality	Independent.co.uk	79%	131	51%	319
(website: last 4 weeks)	ft.com	74%	123	57%	358
	Guardian.co.uk	74%	122	43%	268
	Times Online	73%	120	40%	258
	Telegraph.co.uk	72%	119	41%	251
Popular/Mid-market	Daily Star	82%	135	60%	378
(website: last 4 weeks)	Mirror.co.uk	81%	134	51%	320
	The Sun Online	79%	130	39%	243
	Express.co.uk	72%	119	56%	348
	Daily Mail / Mail on Sunday	70%	116	39%	244

Base: All Internet Users in last 4 weeks

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

The opportunity for newspaper publishers

These findings suggest that the opportunity for publishers is significant.

The national newspaper websites – in particular the sites run by the quality titles – have got themselves into a position where they are very well trusted by their users. As Table 12 shows, for every one of the quality titles, over 60% of site visitors agree that "I can really trust this website". A striking percentage feel sufficiently positive to say that they 'strongly agree' with this statement in relation to their site visited. The contrast with internet users as a whole, most of whom will be unfamiliar with these sites, is dramatic. With the popular and mid-market sites too, the levels of trust are impressive, with 40% or thereabouts of visitors agreeing with the statement.

This puts publishers in a strong position.

Table 12

GB National Newspaper Websites and Trust

Agreement with the statement: "I can really trust this website":

		Specific site visitors (last 4 weeks)			**All Internet Users:**
		Strongly Agree	**Slightly Agree**	**Total Agree**	**Total Agree**
Quality (website: last 4 weeks)	Guardian.co.uk	30%	42%	72%	10%
	ft.com	26%	38%	64%	3%
	Times Online	26%	38%	64%	7%
	Independent.co.uk	24%	40%	64%	6%
	Telegraph.co.uk	19%	43%	62%	8%
Popular/Mid-market (website: last 4 weeks)	Express.co.uk	19%	27%	46%	2%
	Mirror.co.uk	15%	25%	40%	3%
	Daily Mail / Mail on Sunday	12%	30%	42%	5%
	The Sun Online	10%	27%	37%	5%
	Daily Star	9%	32%	41%	2%

Base: All Internet Users in last 4 weeks

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

Going further, we can look at those who publish their own blogs. In doing so, we can see a strong correlation between reading the websites run by the national newspaper titles and blogging. In all cases, between 10% and 20% of the sites' visitors currently publish their own blogs. This tends to be slightly higher among visitors to the quality titles' sites, but is typically at least three times the level of all internet users. (Table 13).

Table 13

Newspaper Site Visitors and Blogging

		Currently publish a blog	
		%	**Index**
All Internet Users		5%	100
Quality (website: last 4 weeks)	ft.com	19%	384
	Independent.co.uk	17%	352
	Telegraph.co.uk	16%	317
	Guardian.co.uk	16%	317
	Times online	15%	300
Popular/Mid-market (website: last 4 weeks)	Express.co.uk	18%	371
	Daily Star	17%	351
	Mirror.co.uk	15%	299
	Daily Mail / Mail on Sunday	13%	260
	The Sun Online	11%	226

Base: All Internet Users in last 4 weeks

Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

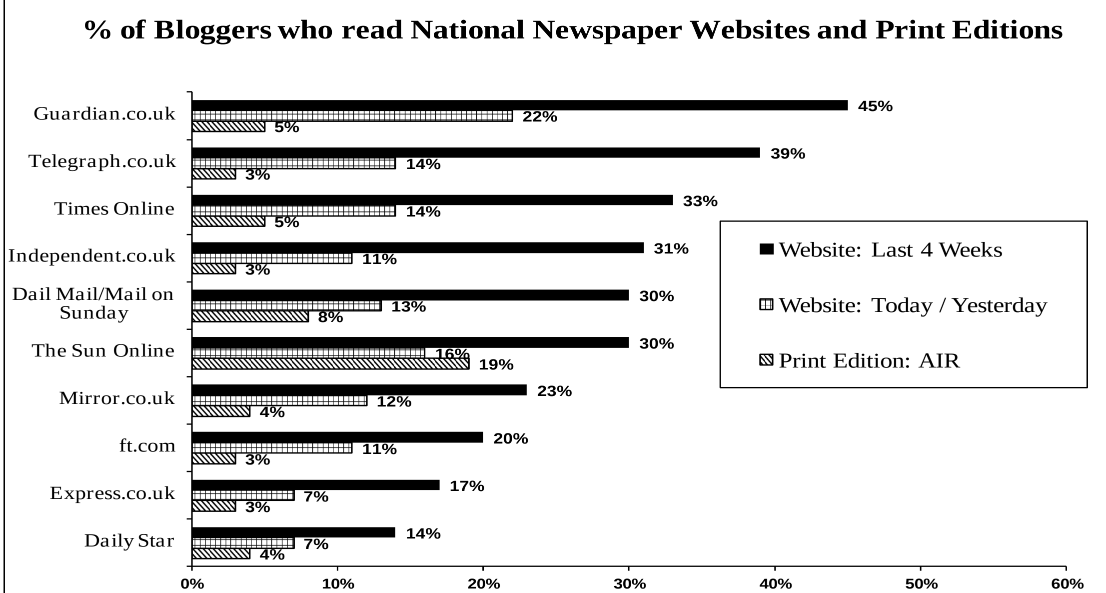
This correlation is even more striking if we look at the figures from another perspective. Among all bloggers, the proportion who visit national newspaper websites is very high indeed. (Chart 4).

To take the most striking example, 45% of all current bloggers have visited Guardian.co.uk in the last four weeks, and 22% of all current bloggers have visited within the last 24 hours (defined as "yesterday or today").

Bloggers regularly visit all the other newspaper sites too. Over 30% have visited many of these sites within the last four weeks – and in most cases over 10% have done so within the last 24 hours.

Bloggers have to get their opinions from somewhere. Many choose to do so from the national newspaper titles. This gives the newspaper titles – notably via their web presence the opportunity to be of great influence.

Chart 4

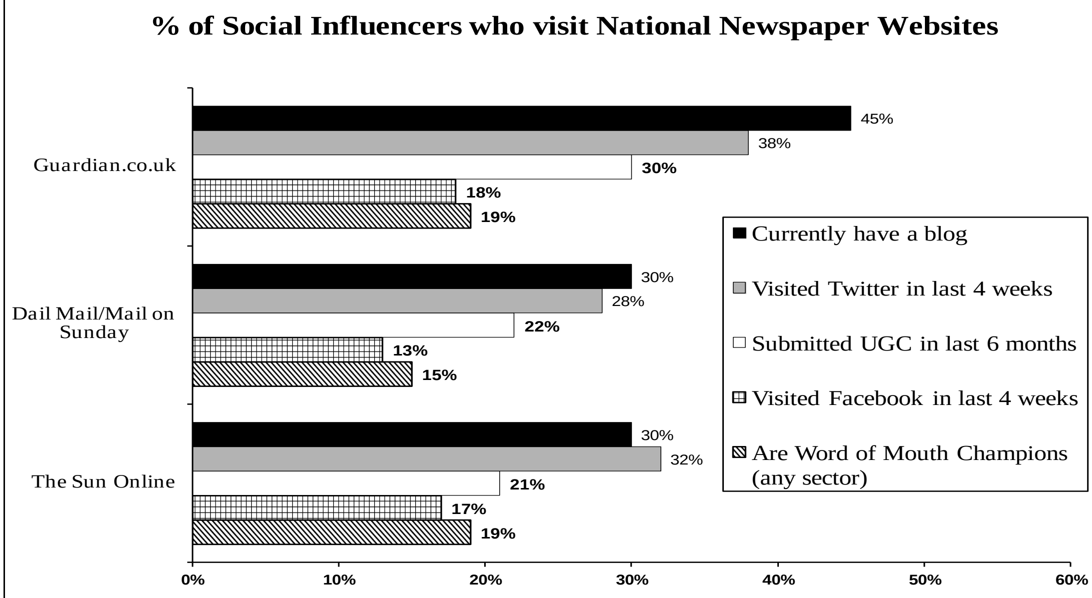


Base: All Internet Users (last 4 weeks) Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

And it isn't only bloggers who have a predisposition to visit the national newspaper sites. Chart 5 shows for three selected newspaper sites (one quality, one mid-market and one popular) how many of those who might be called 'social influencers' access them.

As well as bloggers, those who visit Twitter, those who submit UGC to websites, those who visit Facebook and those who are Word of Mouth champions are all more likely than the average adult to visit these three and all the other newspaper sites.

Chart 5



Base: All Internet Users (last 4 weeks) Source: GB TGI Net 2011 Q2 (Jan-Dec 2010)

However one might choose to define social influencers, they have a strong predilection for accessing the websites operated by all the national newspapers in GB.

They are keen to be well-informed, and to remain well-informed. They regard their favourite newspaper websites as trustworthy sources, and visit them for information and opinion.

There is already a widespread relationship between all forms of UGC providers and print media websites. Publishers should capitalise on this and develop it further.

Conclusions

The print media have to recognise the changes that are in train. They need continuously to keep on top of wherever these changes may lead in the future, and to adapt accordingly. This is not only in terms of resolving questions about how to engage in digital publishing alongside traditional print editions, and the associated commercial issues.

It is also in terms of how news travels, and how communication spreads between consumers. The key question for publishers is how they can play the role of an "authority medium" amidst all this. Here is where the opportunity lies.

There will need to be a range of solutions. There are likely to include collaboration with UGC providers, linking widely with news and comment sites, forming content alliances with key bloggers and the sites they operate, and much more. Many publishers are already involved with site operators and UGC providers in such ways; this will need to continue.

This should be to the advantage of the UGC providers too. As we have seen, UGC often needs mass media in order to be successful, as its authors need stimulus material. Many UGC providers rely extensively on the traditional news media, even if it tends to be via the online versions as against the printed format.

Publishers will have to learn new models. This will mean accepting that journalism is no longer the exclusive preserve of journalists. It will mean embracing social features and collaboration.

As we have seen, the levels of trust attributed to newspaper publishers and their online properties are high. It will be vital for publishers to maintain these levels and thereby retain their position of authority.

Publishers have always argued the advantage of a medium that consumers can take at a pace of their own choice, screening content in or out depending on their interests. As well as brand purchasers, today this applies to UGC creators.

By serving readers, advertisers should follow. From the brand owners' point of view, the advantages of mass media have not changed. They offer reach (by contrast most blogs have few readers) and they offer the advertiser content control.

Publishers can capitalise by emphasising professional content, as well as the amplification potential that can result. For this, they need survey data such as that used in this paper to make their arguments.

Final word

Everyone is entitled to an opinion, and may choose to express it. As readers however, most people want to be able to <u>trust</u> what they read.

When it comes to news, people want it to be factually accurate. When it comes to opinions, people want them to be justifiable and authoritative.

Most individual bloggers can't offer this stamp of trust: this accuracy and authority. The print media can, should and must.

Appendix: Survey Methodologies

GB TGI Net 2011 Q2:
Online custom survey of 4,000 internet users in June, August and November 2010 and February 2011. Fused with GB TGI respondents from Jan-Dec 2010. Overall fused survey sample size of 28,016, of whom 19,060 were internet users in the last four weeks.

Europa TGI Net 2011 R1:
GB as above. Additionally, online surveys of 2,000 internet users in Germany, 2,000 in Spain and 2,000 in France in October 2010 and March 2011. Fused with TGI respondents from each country from Jan-Dec 2010. Overall fused sample sizes of 12,302 in Germany, 27,286 in Spain and 16,615 in France. Within this, 10,142 in Germany, 16,055 in Spain and 12,558 in France were internet users in the last 4 weeks.

Latina TGI Net:
Online surveys of 2,029 internet users in Argentina, 2,495 in Brazil and 2,014 in Mexico in July 2010. Fused with TGI respondents from each country from Jul 2009-Jun 2010. Overall fused sample sizes of 11,863 in Argentina, 20,997 in Brazil and 13,714 in Mexico. Within this, 7,123 in Argentina, 13,127 in Brazil and 7,151 in Mexico were internet users in the last 4 weeks.

GCC TGI Net 2010:
Online surveys of 5,000 internet users (2,000 in Saudi Arabia, 1,750 in UAE and 1,250 in Kuwait) in two waves between July 2009 and July 2010. Fused with TGI respondents from each country from the same time period. Overall fused sample of 7,812 internet users: 2,163 in Saudi Arabia, 2,588 in UAE and 2,431 in Kuwait.

References

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