PRINT IN THE DIGITAL AGE: IS NEWSPAPER READERSHIP ON THE LINE?

Liz McMahon, BMRB International Media Services

Summary

As online moves towards a mass medium in the UK, what challenges does it pose to print-based media?

This paper explores the impact of the Internet on the national newspaper market in the UK. Which audiences are most affected? In the long term does this present a threat or an opportunity? How will the market change?

Background

During the 1990's national newspaper readership in the UK has been in decline. There has been a move away from long term loyalty towards a market which is more readily influenced by price and promotions. What's more, today's readers have less time available to indulge in a regular, daily read. Newspapers have had to compete strongly in order to win readers in today's time-deprived society. In particular they have faced challenges in attracting young upmarket audiences.

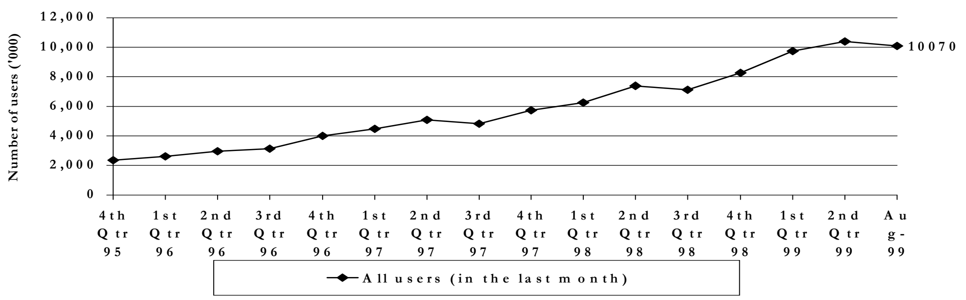
At the same time, we have seen the emergence of online media in the UK (from just 5% with Internet access in 1995 to 22% in August 1999). The early adopters have been typified by the young upmarket audiences that the print media have been so keen to attract. However, with a strong heritage in delivering news, sport and weather, together with high profile branding, newspapers have been well placed to exploit this new medium. So, in the long term, do online media present an opportunity or threat?

1. The Growth of the Online Audience in Great Britain

Back in 1995 when BMRB first started monitoring Internet penetration, the market was very much in its early adopter phase. In the last quarter of 1995 fewer than 5% had access to the Internet (at home/work/elsewhere) and the online audience was biased towards technically-aware young men. Since that time audiences have grown rapidly. Indeed it is reported that the Internet is the fastest growing medium of all-time. Today Internet users have reached 22% of all GB adults and with the rate of growth showing no signs of slowing, the Internet is rapidly reaching mass medium status.

Figure 1: Internet User Population: growth 1995 to present

(Source: BMRB's Internet Monitor)



As audiences grow and broaden so the opportunities to reach new and different target audiences through the Internet grow. Five years ago those accessing the Internet in the UK were highly likely to be male and under the age of 30. These early adopters also gained the reputation of computer anoraks. Clearly this has changed. Women now make up a significant proportion of all users and the age profile has been moving upwards. The Internet remains a strongly upmarket activity but is attracting users of all types in greater and greater numbers.

Figure 2: Profile of the Internet User Population (1995 vs 1999)

	1995	**1999 (August)**
Penetration of GB adults	5%	22%
	Users %	**Users %**
Men	70	60
Women	30	40
ABC1	79	76
C2DE	21	24
15-34 years	64	53
35+ years	36	47

Source: BMRB's Internet Monitor

Recently the greatest growth in Internet usership has come from home use. At the end of 1998 the UK saw the launch of the first free ISP's. This provided an additional boost to uptake such that home use now accounts for 60% of the total usership. This obviously has implications for the way in which the Internet is used and the types of site visited. It also has implications for competing media use in the home.

Figure 3: Location of Usage

% of all Internet users that use at:	**1995 %**	**1996 %**	**1997 %**	**1998 %**	**1999 (Qtr2) %**
Home	21	40	41	50	60
Work	27	42	45	42	37
Academic	29	25	29	24	20

Source: BMRB's Internet Monitor

This development will be further affected by the launch of digital TV in the UK. Last October Sky launched the first UK digital TV service, closely followed by a terrestrial digital offering from OnDigital. This autumn we expect to see the roll out of cable digital. All services offer an opportunity to go online via the TV. Satellite options are currently restricted to a closed environment whereby users enter a controlled interactive environment (a service curiously branded "Open"). Cable digital looks set to offer full Internet access via the TV. This again will expand the online audience further and this time perhaps with greater representation of older and more downmarket audiences.

Figure 4: Digital Television audiences: potential to expand online (intention to access digital TV in the next 12 months)

Base: non Internet users	6984 %
Already have digital TV	6
Definitely will access	4 *(=1.5 million adults)*
Actively considering	5
May access	11
Undecided	18
Definitely will not	56

Source: BMRB's Digital Update (July 1999)

So far the Internet has been restricted to access in the office or at home. Future developments will enable users to go online while on the move. The next wave of palm pilots and mobile phones will enable users to access the Internet wherever they are. Developments in digital audio broadcasting will also provide opportunities for the general public to receive data via their in-car digital radio. Clearly the provision of news, information and entertainment that is currently competing against newspaper readership in the home will soon move into a more mobile environment too.

2. Newspaper Readership among Internet users

The audiences being attracted to the Internet represent the demographic groups most likely to be regular readers of national newspapers. The young, upmarket and those in full-time employment are all represented in higher than average numbers. However, Internet penetration varies significantly across different publications. As an example the penetrations of Internet access and World Wide Web usage are summarised below.

Figure 5: Penetration of Internet access across different titles (average issue readers)
(Figures shown as horizontal percentages)

	Used the Internet in the last 12 months	**Use Worldwide Web at least once a month**
All adults (%)	24	18
The Financial Times (%)	66	55
The Times (%)	56	46
The Guardian (%)	56	46
The Independent (%)	51	41
The Daily Telegraph (%)	38	31
The Daily Mail (%)	27	21
The Daily Express (%)	24	18
The Daily Star (%)	19	10
The Sun (%)	18	12
The Daily Mirror (%)	15	10

Source: the National Readership Survey Q1 and 2 1999

Clearly titles which attract the young and the upmarket experience the greatest penetration of Internet users among their readers. It is worth pointing out that the impact of new free ISP's launched by the Sun and the Mirror was yet to be experienced in the period that these figures cover.

Without the benefit of long term behavioural tracking via a panel it is difficult to quantify the impact on newspaper readership. However, it is possible to look at current readership behaviour among Internet users. For the purposes of this paper we've focused most strongly on daily readership as this is where the Internet is in most direct competition.

Figure 6: Readership among Internet users (average issue readership)

	All adults (18210) **%**	**Used the Internet in the last 12 months** (3849) **%**	***Index on all adults***	**Heavy www users (daily+)** (822) **%**	***Index on all adults***
The Sun	21.4	16.4	*77*	17	*79*
The Daily Mirror /Record	17.0	10.9	*64*	9.1	*54*
The Daily Mail	12.3	14.1	*114*	14.2	*115*
The Daily Telegraph	5.4	8.6	*159*	8.6	*159*
The Daily Express	5.2	5.2	*100*	5.3	*102*
The Times	4.1	9.7	*237*	10.5	*256*
The Daily Star	3.3	2..7	*82*	1.8	*55*
The Guardian	2.4	5.5	*239*	5.8	*242*
The Financial Times	1.4	3.8	*271*	3.7	*264*
The Independent	1.4	3.0	*214*	2.4	*171*

Source: the National Readership Survey Q1 and 2 1999

So Internet users haven't yet given up newspapers altogether. They still represent a sizeable chunk of the market, particularly for the quality broadsheets and, to a lesser extent the mid-markets.

In general, reflecting their upmarket demographic bias, Internet users are more likely to read a daily newspaper than other groups. However, they appear to be less likely to be loyal to a single brand. Among the national dailies covered by the NRS, Internet users have read or looked at an average of 3 different titles in the last 12 months (vs an average of 2 among all adults)[1] Again this reflects the growing behaviour of young upmarket readers these days. Increasingly individuals are becoming less loyal to a single newspaper brand and more likely to be section or promotion-led to different titles across the year.

3. Current Impact on Readership

There is clearly a potential threat to readership of printed titles. However, when asked specifically whether they are reading newspapers more or less often as a result of getting the Internet, 90% claim that it has made no difference at all. Just 5% claim to be reading them less than before; in fact, the same number claim to be reading more often these days[2].

In terms of *direct* competition from the online titles, the actual numbers affected are also currently low. In the latest wave of our Internet Monitor (August 1999) we asked about the potential replacement of newspapers/magazines with online versions. Numbers claiming to have switched are very low.

Figure 7: Stopped reading newspaper or magazine in last 12 months in favour of online title

Online version of same title replaced printed version	2%
Online version of another title replaced printed version	1%
Neither	97%

Of course this measures claimed behaviour in the last 12 months – the “true” figures over a longer period may well be higher.

It is worth highlighting that among heavy users of the Internet the proportion of those claiming to have been affected are significantly higher. As many as 10% of heavy users claim to read newspapers less often as a result of getting access to the web. Again among these heavy users, 4% claimed to have replaced a printed title with its online version and 3% to have replaced with a competitive online version. Perhaps as people become more familiar and comfortable with the Internet, so it may become more of a threat to print?

Supporting this evidence, we find that, although still in a minority, significant numbers of users agree that *“I am less likely to read a printed newspaper as a result of reading it online”*. Again this is higher among those who are heavier users or have been using the Internet for several years:

Figure 8: Agreement *: I am less likely to read a newspaper as a result of reading it online*

Base: all Internet users (1000)

	%
All adults	17
Heavy[3]	**23**
Medium	13
Light	15
Junior	16
Adolescent	14
Senior	**22**

Source: BMRB’s Internet Monitor (August 1999)

So, although the challenge to print as yet has been small, there are signs that it may grow, as users become more aware and comfortable with the online environment.

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1 Again drawn from an analysis of Q1-2 NRS 1999
2 Internet Monitor : August 1999
3 **Definitions**:

Heavy = use the Internet most/every day	Junior = Started using the Internet within the last 12 months
Medium = use once a month or more	Adolescent = Started 1- 2 years ago
Light = less often than once a month	Senior = Have been using for more than 2 years

4. How does the Internet Compete with Print?

As yet then, the Internet and online sites have had a relatively small direct impact on newspaper readership. However, clearly there is potential for this threat to grow as the medium develops. How does the Internet currently compete with the national press? This section explores the way in which the Internet currently competes with print:

- Competing for time
- The impact on reading *behaviour*
- Competing in terms of content provision
- Perceived advantages over printed newspapers

Each is explored in greater detail below.

4.1 Time

In a world of increasingly long working hours, individuals have less and less time available to consume media. Of course this is particularly true of those young, upmarket audiences so attractive to advertisers. At the same time those individuals are being presented with more and more media options. More printed titles, more channels, more radio stations and more interactive media. It's small wonder that readership and the time that individuals devote to reading a paper is in decline.

Among a sample of 1030 adults[4] interviewed in August we found that 40% agreed that *" Increasingly I find that I don't have the time to make reading a newspaper worthwhile*". Amongst the working population and the under 55's this proportion is even higher.

So what impact do the new, digital media have on this situation? By and large, television appears to be the medium most affected. With the increase in Internet use in the home so leisure time becomes drawn away from the TV. Of course, TV occupies the greatest share of time in the home and therefore has the most to lose. TV is also most analogous to the Internet, each are competing for "eyeballs" in a very similar way. It's difficult to combine the two whereas radio, for example, can happily sit alongside the Internet as the user surfs and listens at the same time.

Given that 42% of home users access the Internet "most days" and the vast majority go on at least once a week, this presents a serious challenge to other media. By and large the Internet occupies individuals for relatively long sessions at a time. On average, users estimate that on a day that they do access the Internet, they spend just under an hour logged on. Inevitably this eats in to the time that might be spent on other media.

The potential is also there to grow, not only are the sheer numbers of users growing but a large proportion (at least half) of existing users believe they will be using it even more in 12 months' time.

Figure 9: Impact on the time spent on competing media

As a result of getting access to the Internet, which of these are you doing less of?

Base: All Internet users (1000)

	%
Watching TV	30
Reading magazines (exc. Computer)	15
Using Teletext or Ceefax	15
Reading national newspapers	14
Reading computer magazines	14
Reading local newspapers	11

Source: BMRB's Internet Monitor (August 1999)

Not surprisingly those who claim to be spending less time reading national press are most likely to be heavy Internet users; worryingly this also represents the younger adults (18% of 15-24's vs 12% of the 25+'s).

[4] Run on BMRB's Access omnibus survey 20-22 August among a nationally representative sample of 1030 adults. Telephone interviews using random digit dial sampling procedure.

4.2 Reading behaviour

We've seen that Internet users have a relatively high propensity to read national dailies but that they are less likely to be loyal to a *single* newspaper brand. We've also seen that there is a common feeling that individuals no longer have the time available to devote to reading a newspaper nowadays. With the opportunities presented by the Internet, individuals are getting information and entertainment from a wide variety of different sources. On average, web users visit 25 different sites each month. Clearly individuals no longer feel able to devote long periods of time to an in-depth read of their newspaper. Among Internet users, when they do read a newspaper only 27% claim to typically read most of it:

Figure 10: Typical newspaper reading behaviour

Base: All Internet users (1000)

	%
Read most of it	27
Read some of it and scan the rest	39
Read some of it and scan some of it	27
Just read a few regular features you know are there	8

Source: BMRB's Internet Monitor

There is a suggestion that, although readers are not yet giving up their printed newspaper, the time that they can devote to it is on the decline. This has obvious implications for the quality of reading and levels of advertising exposure that newspapers can offer.

4.3 Content

So the Internet is competing strongly for time but does it compete head-on in terms of the content that it provides? By and large the Internet fulfils a very different need to that of a printed title. Users access real-time updates on news, sport and weather. A site such as BBC News Online is enormously successful. People use it both for quick updates and conversely too for a more in-depth analysis of news items. Like all news media the web is strongly affected by big news stories. All of the news sites on the web experienced an increase during the Kosova crisis at the beginning of the year. But once a visitor has been to that site they will come back again. Clearly these news sites could present a threat to the service that newspapers have long provided.

But it's the "old media" who are at the forefront of the online delivery. Organisations such as the BBC and the Telegraph have the experience, resources and professionalism to make it work on the web. In these early days they also have the money to put behind what are essentially loss making services. It's no surprise that traditional media owners appear high up the list of the most used UK sites.

Figure 11: Top ten web sites : numbers claiming to visit[5]

Base: all World Wide Web users (877)	**Ever visited** %	**Visited last 4 weeks** %
bbc.co.uk/other BBC *(news/TV)*	60	33
amazon.co.uk *(books)*	47	22
freeserve.co.uk *(ISP/portal)*	44	26
aol.so.uk *(ISP/portal)*	37	15
msn.co.uk *(ISP/portal)*	29	18
the-times.co.uk/sunday-times.co.uk *(newspaper)*	29	12
virgin.net *(ISP/portal)*	25	13
cnn *(news site/TV)*	25	11
channel4.co.uk *(TV/entertainment)*	23	8
telegraph.co.uk *(newspaper)*	23	10

Source: BMRB's Internet Monitor (August 1999)

Overall around half of all Internet users (and almost 6 in 10 web users) have ever paid a visit to one of the national newspapers' web sites. The specific sites visited are examined in greater detail later on. But what do they want from an online newspaper?

[5] Claimed visit to prompted list of over 50 sites.

Visitors to these sites are attracted by news first and foremost. This reflects the overall position on the web whereby news and information sites far outweigh entertainment. Sport plus business/finance are also widely used although the latter is driven significantly by use at work (for example usage made of FT.com by the business community in the UK). However, as well as the quick updates users are also attracted by the more in-depth opportunities to scan the archives (19% of all web users have accessed a newspaper web site for this purpose) and to get added detail and analysis (14% of all web users).

Figure 12: When you visit a newspaper web site what do you typically look at?

Base: All who have visited a newspaper web site (502)

News	75%
Sport	42%
Searching archives	38%
Business	36%
Finance	36%
Jobs/appointments	28%
Added detail/analysis	28%
Arts and reviews	24%
Weather	25%
Entertainment listings	23%
Puzzles/competitions	15%
Classified ads	11%

Source: BMRB's Internet Monitor (August 1999)

Perhaps surprisingly, the Internet population with their clear young, upmarket bias still want depth and detail in their news. Among those who use the Internet two thirds **disagree** with the statement *"In terms of news I only want quick headlines, not in-depth analysis"*. In spite of time pressures and the growing trend to supply fast yet topline news, there is still a real demand for a greater analysis and understanding.

Figure 13: Agreement with: ***"In terms of news I only want quick headlines, not in-depth analysis"***

	Internet Users (1000) %	**All adults (1030) %**
Strongly agree	9	16
Slightly agree	16	18
Neither	8	6
Slightly disagree	28	19
Strongly disagree	38	36

Source: BMRB's Internet Monitor (Aug 1999) and questions run via Access by telephone (Aug 1999)

What's more they read their newspaper for news *not* entertainment – fewer than one in five Internet users claim to read a newspaper for entertainment not news these days.

Newspapers and web sites are perceived to provide very different things. When asked directly if they had stopped buying national newspapers because they could access the same information over the Internet less than 2% of Internet users claimed to have done so.

Publishers have made a conscious effort not simply to duplicate their title online. Most revise their content so that they deliver an appropriate product through an appropriate medium. However, it is fair to say that in GB the situation is not as far developed as the States where there are dedicated net newspapers. Indeed there are examples of titles that have replaced their print copy entirely with their edition on the web[6].

[6] For example, The Utah Times.

In the UK web users do expect to see a certain level of consistency with the main paper. Of those who have had experience of an online newspaper 90% expect at least some of the information to be the same. Indeed 1 in 5 expect the content to match exactly. However, most users anticipate the online newspaper should provide **more** detail. Again this supports current usage of added depth and archives.

Figure 14: What do you expect a newspaper to provide online?

Base: All newspaper site visitors (502)

	%
Exactly the same content as the original newspaper	22
The same plus more detail	57
Same information but less detail	11
A different range of information	9

Source: BMRB's Internet Monitor (August 1999)

Of course this may reflect much of the current offering and past experience of these web sites. As the sites develop and the audience matures so expectations of a rather different offering may grow.

4.4 Perceived Advantages Over Printed Newspapers

Ultimately the success of the online sites lie with the product they offer consumers. If consumers can see an advantage over printed matter then they will visit and use the sites.

As part of the latest Internet Monitor (August 1999) we asked Internet users what were the advantages and disadvantages of online newspapers over print.

Figure 15: Perceived Advantages of Online Newspapers over their Printed Versions

Base: All Internet users (1000)

	%
Easy to access at any time	18
Regularly updated	14
More detailed information than in printed newspapers	8
Quicker to read/find what you want	8
Cheap/free	8
You don't have to go out to buy it	6
Environmental reasons/save paper	4
You can be more selective about what you read	3
You don't get your fingers dirty	2
Search facilities	2
Archives	2
Multimedia capability (sound/video)	2

(No other answer given by more than 1%)

Source: BMRB's Internet Monitor (August 1999)

Clearly the key perceived benefits lie in the ease of regular access and the speed with which information is made available. During the recent earthquakes in Turkey the first eyewitness accounts were posted on the Internet long before any TV crews or press reporters arrived. It is this speed of reaction that Internet users appreciate.

The depth of information that can be held on a web site and the ability to access past stories are also seen as benefits by a significant number. Mentioned by only a small number here but clearly appreciated on a global scale is the opportunity to access the title overseas.

However, most can also see the advantages of the traditional printed title over is online competitors.

Figure 16: Advantages of printed newspapers over their online versions

Base: All Internet users (1000)

	%
Portable/can read while travelling	23
Cheaper/fixed fee	15
More accessible/handy	14
Can read in your own time/can pick up whenever	12
Easier to read/browse	10
Tactile/nicer to hold a paper	7
Can keep copies/cuttings	4
More comfortable/relaxing/enjoyable	4

(No other answer given by more than 3%)

Source: BMRB's Internet Monitor (August 1999)

Overall, even Internet users can more readily name advantages of the printed version over online. Alongside the portability and flexibility in being able to carry a copy wherever you are, the tactile aspects of relaxing with a newspaper come through very clearly. Even among heavy users of the Internet who are generally more comfortable with using a navigating their way around, signficant numbers see the tactile benefit of a paper copy (8% of heavy users mention the tactile element and 13% state that its easier to read).

However, this may well change. The most frequently mentioned benefit of portability may disappear over the next few years as access to the Internet and to other forms of digital data becomes available to consumers on the move. The next wave of mobile phones and palm pilots will be able to access the Internet wherever you are. Indeed there are recent reports that IBM have developed the world's first working electronic newspaper with a touch sensitive paper keyboard. These and other developments will take online newspapers yet another step forward.

5. The Performance and Future of Newspaper Web Sites

In the UK national newspapers have not been slow to recognise the power of the Internet. The national press were some of the earliest investors in the web and today they offer some of the most widely used sites. Initially, their motives were driven by the potential threat posed by the net. More recently, newspaper publishers have recognised the potential that online media offers. First an opportunity to introduce a wider audience to their brand and secondly the extended advertising and e-commerce opportunities that they can offer to advertisers.

The national newspaper web sites available in the UK each attract a high levels of use. The broadsheet titles have very well established web sites – those of the Times and the Telegraph have been visited by more than one quarter of all Internet users. The launch of free ISP's by the tabloid publishers of the Sun and the Mirror have attracted significant numbers to their sites more recently.

Figure 17: Top ten newspaper web sites : numbers claiming to visit[7]

Base: all World Wide Web users (877)	Ever visited %	Visited last 4 weeks %
the-times.co.uk/sunday-times.co.uk	29	11
telegraph.co.uk	23	10
guardian.co.uk/observer	17	8
ft.com	15	6
independent.co.uk	10	3
the sun.co.uk	8	5
mirror.co.uk	7	4
express.co.uk/express.lineone.net	6	3
scotsman.com	4	2
thisislondon.com	4	2

Source: BMRB's Internet Monitor (August 1999)

Digital media offer the consumer control over what they use and receive. No longer do they need to rely on a newspaper editor to select and present information and analysis. They can choose what they want to see from wherever they like. An individual may select a number of titles across the week to serve different needs and navigate the web in the same way, taking sport from one site, news from the next. Unlike the past where the reader chose just one title, often for life, today's reader has a much greater repertoire. They may read different newspapers on different days for different reasons; often this may be section led. The Internet simply adds to this choice.

As an example, users of the top three newspaper sites are isolated below. Clearly they are getting their information and entertainment from a wide source of different directions:

Figure 18 : Other web sites visited among specific newspaper web site visitors

Base: users of specific web site (ever visit)

Top ten sites visited	**the-times.co.uk/sunday-times.co.uk (251) %**	**telegraph.co.uk (197) %**	**guardian.co.uk/observer (148) %**
the-times.co.uk/sunday-times.co.uk	100	58	56
telegraph.co.uk	45	100	45
guardian.co.uk/observer	33	33	100
ft.com	31	28	27
independent.co.uk	28	28	33
the sun.co.uk	15	11	13
mirror.co.uk	12	11	15
express.co.uk/express.line one.net	14	11	14
scotsman.com	8	6	5
thisislondon.com	10	7	10
Average number of GB national newspaper sites ever visited	***2.2***	***2.0***	***2.3***

Users of each of these sites have visited an average of another 2 other national newspaper sites in the past. A similar pattern emerges when the criteria is tightened to visits made in the past 4 weeks.

So, with this growth in repertoire-building, newspapers need to protect and grow their brand. Although the economics of the Internet enable many more competing suppliers to challenge the traditional brands, it is to the well-known brands that users will turn to for good quality reporting that they can trust. Newspapers have a clear head start over newer brands. The existing brand values also help attract both advertisers and visitors. Furthermore, newspapers are able to use their existing printed form to cross-promote and add value to the offering online.

[7] Claimed visit to prompted list of 14 newspaper web sites.

So does the Internet do more than simply provide an alternative classified vehicle or a preventive means to guard against the new online brands? Can it really reach new audiences or build loyalty among existing readers? Certainly the evidence suggests that it can and that it is doing so in Britain.

The Internet can provide an opportunity to recruit new "readers" to the core brand. Across a range of different daily titles covered we found that around 30% (an average across all titles) of those who had visited a specific newspaper web site in the last 4 weeks had not read a printed copy of that title in the last 12 months. Given the very small numbers leaving the national press in favour of their web sites, it seems likely that these individuals represent a new audience for the title.

The web also presents opportunities to tie in loyal readers yet further to the brand. If done well the web site will add to the share of media time that a reader commits to the brand. We've seen that users do perceive online newspapers as presenting something quite different to the printed version. For many the two can co-exist quite comfortably. Again looking across a range of different newspaper web sites we found that 1 in 4 visitors (last 4 weeks) regularly bought their own copy of the same newspaper brand. Clearly the web can also be a tool for building brand loyalty.

6. Summary and conclusions

As yet, the Internet has had a relatively small direct impact on the British newspaper market. However, as the Internet population reaches critical mass and begins to reach a far broader audience than before, the impact will be more widely felt. Access via the TV screen and via mobile means (phones and palm pilots) will spur this growth yet further. One of the key advantages of print over online, portability, will soon be overcome.

Internet users largely supplement rather than replace their existing readership with online brands. Each is seen to serve a different role. However, as the opportunities to extend online channels grow and users become more familiar with the online environment, so replacement of printed titles may grow. Heavy users and those who have been using the Internet for longer are already more likely to have moved away from print (although still in very small numbers).

Readership behaviour has changed over the past 25 years. Today's readers have a wider repertoire of sources: print, broadcast and online. Individuals have a far greater repertoire than the past, yet less time available to read and digest. We have all become better at selecting and editing the information we receive but what impact does this have on the quality of advertising exposure offered to the advertiser?

Newspapers are well placed to serve the digital marketplace. In the early stages they have had the financial backing to resource expensive online strategies. What is more important is their tradition and reputation in providing trustworthy news and analysis. This is particularly true of the quality press although the popular titles too will be able to exert considerable brand leverage over lesser-known names.

As media fragments and the traditional print owners are presented with more and more opportunities to reach potential audiences so the value of the brand will increase. Inevitably the Internet will impact on the traditional print market, although how long it will take and how significantly it will be felt, it is hard to judge. However, digital media present new and different opportunities to build relationships with that core brand. Without doubt this has implications for readership research. The difficulties of measuring newspaper sections are well known but how much harder will it become when the core product fragments into not just sections, but many different digital forms?

Notes

Many of these findings have been drawn from **BMRB's Internet Monitor.** This survey runs in two parts:

- A continuous track of Internet use (penetration, profile and location) among more than 100,000 adults each year. Interviews carried out face-to-face in home using random location sampling.
- A more detailed interview among fresh samples of 1000 individuals identified as part of the tracking study. Interviews conducted over the telephone and run in three waves each year.

Tracking began in the third quarter of 1995 and has run continuously since then.