PRINT MEDIA INTERNET PORTALS: A BOON OR BUST FOR PRINT MEDIA CONSUMPTION?

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Introduction

Early Internet users were also far above-average consumers of print media, a finding that was certainly partly, but by no means exclusively, attributable to their higher social class. Given the continually growing share of Internet users, however, we must ask whether Internet newcomers are still as favorably inclined towards the print media and reading in general as early Internet users once were.

This paper examines this question using data from the *Allensbach Media Market Analysis* (AWA) and the *Allensbach Computer and Telecommunications Analysis* (ACTA), which are two broadly based studies comprising about 20,000 and, respectively, 10,000 interviews annually. Moreover, the paper includes findings from special face-to-face panel surveys conducted from 1998 to 2000 that allow us to compare relatively early Internet users to those who began using the Internet at a later point in time.

Defining Online Users

We define users of online services in a narrow sense as only those respondents who personally have access to the Internet or to online services, either privately or at work. In summer 2001, 40 percent of the adult population (age 14-64) belonged to this group.

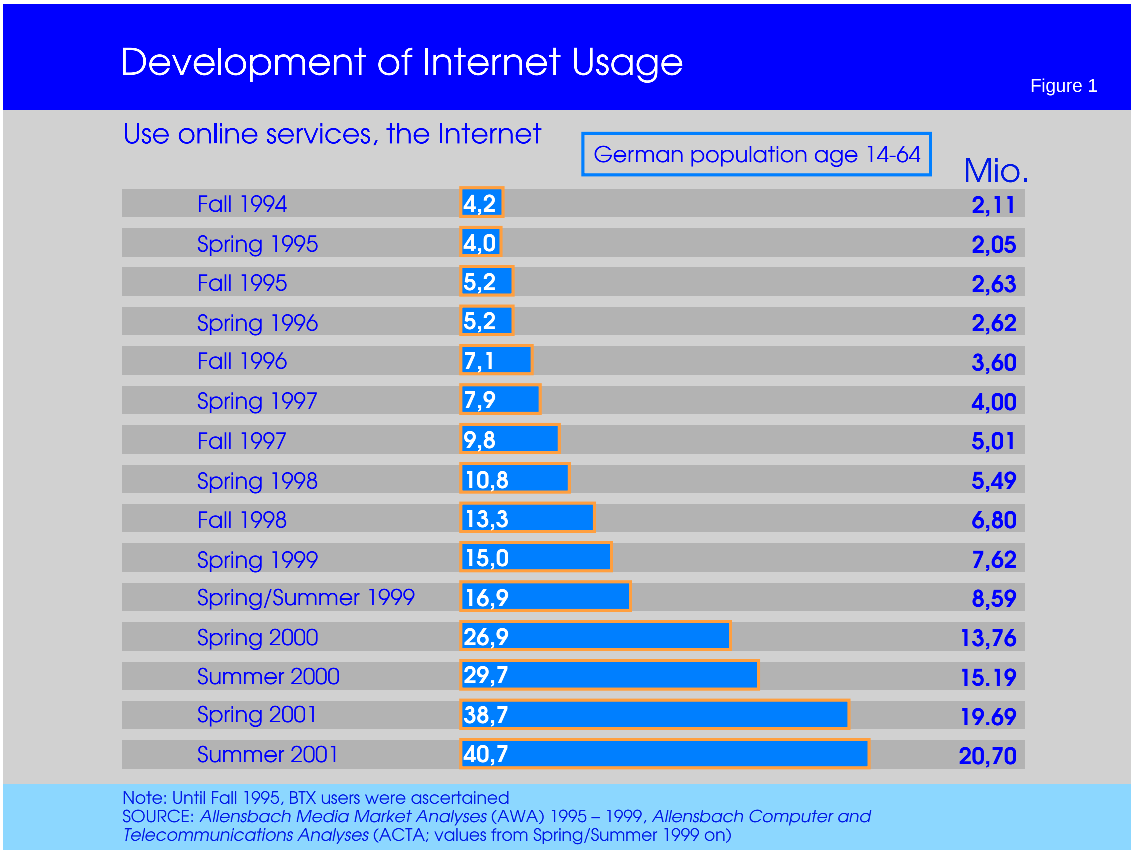
Online Usage Trend in Germany

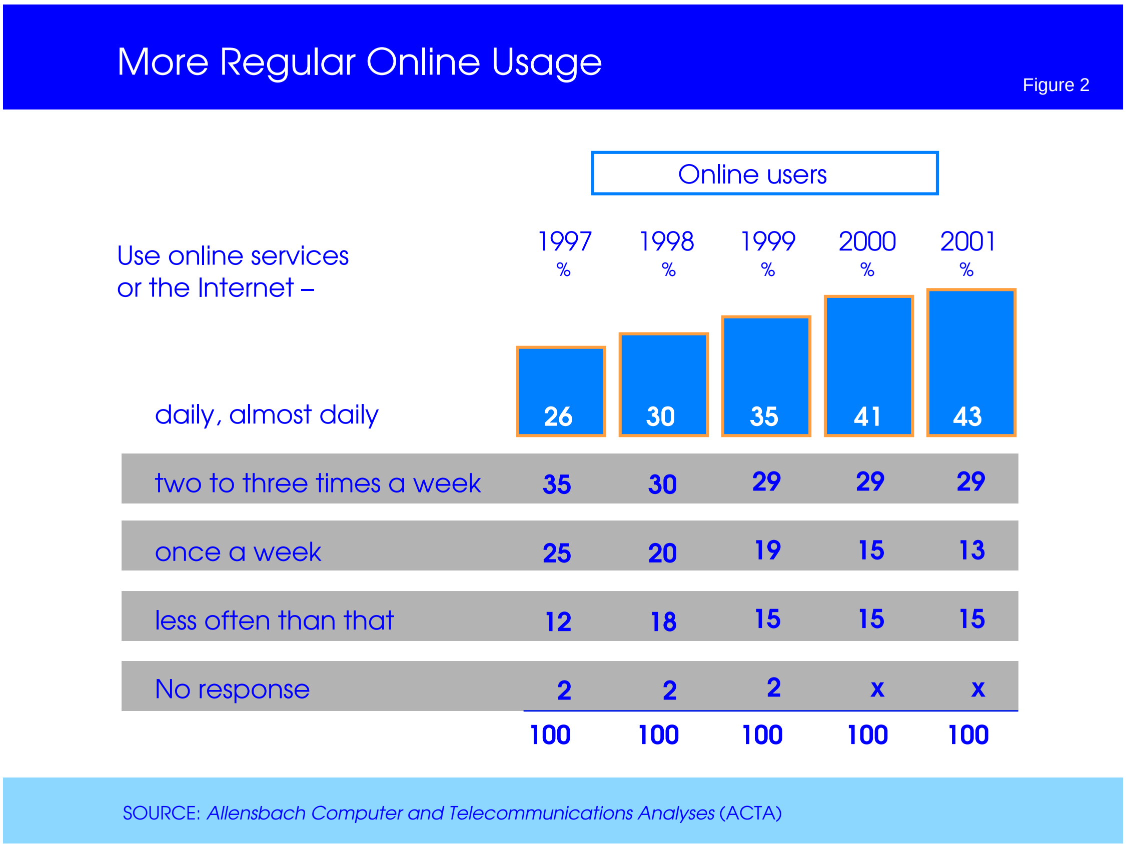
Up to 1996, no more than 5 percent of the adult population had used the Internet or online services, a percentage which grew considerably in subsequent years: to 9 percent in 1997, 12 percent in 1998, 16 percent in 1999, 29 percent in 2000 and 40 percent in 2001 (Figure 1). The following analysis primarily focuses on the findings ascertained between 1998 and 2001.

More and More Often—But with Time Limits

As the target group of online users broadens, it would not be surprising to find the intensity of online usage decrease. This, however, is not the case: on the contrary, the growing group of online users is also using the Internet with ever greater intensity:

- In 1997, online services were used daily or almost daily by 26 percent of all online users,
- by 30 percent in 1998,
- by 35 percent in 1999,
- by 41 percent in 2000, and
- by 43 percent in 2001 (Figure 2).


Development of Internet Usage
Figure 1
Use online services, the Internet
German population age 14-64
Mio.
Fall 1994 4,2 2,11
Spring 1995 4,0 2,05
Fall 1995 5,2 2,63
Spring 1996 5,2 2,62
Fall 1996 7,1 3,60
Spring 1997 7,9 4,00
Fall 1997 9,8 5,01
Spring 1998 10,8 5,49
Fall 1998 13,3 6,80
Spring 1999 15,0 7,62
Spring/Summer 1999 16,9 8,59
Spring 2000 26,9 13,76
Summer 2000 29,7 15.19
Spring 2001 38,7 19.69
Summer 2001 40,7 20,70
Note: Until Fall 1995, BTX users were ascertained
SOURCE: *Allensbach Media Market Analyses* (AWA) 1995 – 1999, *Allensbach Computer and Telecommunications Analyses* (ACTA; values from Spring/Summer 1999 on)


More Regular Online Usage
Figure 2
Online users
Use online services or the Internet –
1997 % 1998 % 1999 % 2000 % 2001 %
daily, almost daily 26 30 35 41 43
two to three times a week 35 30 29 29 29
once a week 25 20 19 15 13
less often than that 12 18 15 15 15
No response 2 2 2 x x
100 100 100 100 100
SOURCE: *Allensbach Computer and Telecommunications Analyses* (ACTA)

More than 80 percent of online users go online at least once a week. On the days when they use the Internet, however, most people do not spend more than an hour online. Slightly less than a third of them report spending one to two hours online, while less than ten percent are online for three hours or more — a distribution that has remained practically unchanged over the past few years (Figure 3).

But Still Mostly for Less Than an Hour

Figure 3

Estimated time spent online on the days when the Internet or online services are used:	Online users 1997 %	1998 %	1999 %	2000 %	2001 %
Less than half an hour	23	26	23	23	22
	60	62	61	63	61
Half an hour to one hour	37	36	38	40	39
1 – 2 hours	29	31	30	29	30
3 – 4 hours	6	4	5	5	7
5 – 6 hours	1	1	1	1	1
More than 6 hours	1	1	1	1	1
No response	3	1	2	1	x
	100	100	100	100	100

SOURCE: *Allensbach Computer and Telecommunications Analyses* (ACTA)

People are thus becoming increasingly accustomed to using online services, but apparently want to limit the time devoted to Internet usage per day. Of course, we should note that as using the Internet becomes an increasingly routine activity, it is also used more efficiently. Moreover, technological advances give people quicker access to online services, so they can do more nowadays than they could earlier within a given period of time. Nevertheless, it still seems significant that most users are satisfied with no more than one hour of Internet usage on days when the go online.

Growing Private Significance

The share of online users who use the Internet for professional reasons has sunk to somewhat more than 40 percent, while the share of those who use it for private purposes has continued to increase and is now more than 90 percent. Slightly less than 20 percent use it for school or university studies. Hence, the Internet is increasingly being used for several purposes, which go above and beyond purely professional activities (index for 1997 = 100, for 2001 = 108) (Figure 4).

Growing Private Significance

Figure 4

Use the Internet/ online services –	Online users* 1997	1998	1999	2000	2001	Index 1997 = 100
	%	%	%	%	%	
privately	73	76	76	86	92	126
professionally	52	48	49	47	43	83
for university studies, school	16	13	13	18	18	106
	141	137	138	151	153	108

*) ages 14 – 64 (1997: 14 – 54)
SOURCE: *Allensbach Computer and Telecommunications Analyses* (ACTA)

Internet and Print Coverage Increase

The most recent develpments in media coverage show that in 2001 the coverage not only of the Internet, but also of print media and televison, continued to increase.

Table 1: Trends of Media Use in 2001

	Coverage in million people, 2001	Change from previous year %
Print media total	63.40	+1.8
General interest magazines, weekly newspapers (247 titles)	60.50	+1.4
Sales bulletins (14 titles)	21.70	+8.0
Nationally distributed newspapers	4.09	+2.9
Regionally distributed newspapers	39.11	+0.9
Tabloids	13.58	-1.0
Advertising freesheets	41.89	+0.6
Televion total	42.80	+1.9
Public stations (ARD, ZDF)	41.14	+0.4
Large private channels (ProSieben, RTL, SAT.1,)	37.89	-1.8
Small private channels, specialist channels (7 channels)	27.50	+10.2
Posters total	42.70	+4.4
Internet	11.80	+68.6

Source: Allensbach Media Market Analysis (AWA 2001); print media: readers per issue; TV: viewer per day; posters: likelihood of exposure per day; Internet: user per day.

New Internet Users Less Attached to Print?

These developments are not surprising; they already emerged in earlier Allensbach studies – studies which used face-to-face interviews of the same people, that is to say: in panel studies. One of these is the follow-up survey to the *Allensbach Media Market Analysis* (AWA), as the basis of the study FAME. People were first interviewed between the fall of 1998 and winter 1999/2000; the second survey was administered over 34 weeks on average in the period between November 1999 and June 2000. This means that the study covers exactly the period that witnessed an especially large increase – almost a doubling – in the share of internet users. In this study, precisely

- 12.1 percent used the Internet at both points in time – we call them "early" or "constant" users,
- while 11.7 percent newly joined the group of Internet users – they did not yet have access to the Internet in the first wave – we call them "new" Internet users.
- Some even gave up the Internet; they comprised 1,9 percent and are called "transferring" users.
- 74.3 percent did not have access to the Internet in either wave – "constant non-users".

These results show very clearly how the new Internet users were more similar to the population at large than the early users, for instance in

- a share of women of 47 percent among new users, while only 34 percent of early users were female (population at large: 52 percent);
- a share of those aged 40 and over of 37 percent, while only 33 percent of constant users were 40 or older (population at large: 69 percent);
- a share of 68 percent of new users having had basic or intermediate-level education while only 51 percent of early users belonged to this group (population at large: 60 percent);
- 26 percent of new, but only 17 percent of early users being workers or living on a worker's income (population at large: 40 percent).
- 41 percent of the new Internet users not living in metropolitan areas, which are clearly more than the 33 percent among early users (population at large: 45 percent).

The more "normal" structure of new Internet users also emerged with regard to economic criteria: Their chief wage earner's income, their household income and their disposable income were all not as high as the early users' income. The results are shown in the Table in the Appendix.

Even if new Internet users were thus more similar to the population at large than early users, their affinity to print media was only a little bit smaller than the early users'. This can be shown by the overall coverage (broadest readership) for 60 selected titles, which comprises a total of 1,163 percent among constant Internet users, 1,089 percent among new Internet users, and only 731 percent among constant non-Internet users. Individual titles, however, may obtain varying coverage rates in accordance with their broader target groups (Table 2).

Table 2: Coverage of Selected Print Media among Constant, New and Transferring Internet Users and Constant Non-users

	Internet user groups				Population at large
	Constant users	New users	Transferring users	Non-users	
Base	885	814	140	4,669	6,508
Percent belonging to broadest readership of ...					
Bild am Sonntag	45.0	47.5	45.8	46.2	46.2
Bunte	40.5	43.0	44.3	39.4	40.0
Gala	13.4	14.8	11.2	10.4	11.3
Das Beste	24.2	22.4	23.7	22.5	22.7
Focus	64.5	56.2	41.7	32.5	39.4
Der Spiegel	65.8	53.6	45.7	34.1	40.4
Stern	75.0	68.8	62.7	49.4	55.0
Bildwoche	6.2	7.3	5.3	7.8	7.5
Fernsehwoche	12.2	14.5	13.8	15.4	14.9
Funk Uhr	11.5	11.8	7.9	14.6	13.7
Hörzu	24.6	27.4	26.3	23.7	24.3
TV Hören und Sehen	13.0	12.9	9.5	14.9	14.3
TV Neu	5.8	7.2	10.2	8.0	7.6
TV Movie	30.1	31.3	22.4	14.3	18.4
TV Spielfilm	36.4	38.5	30.4	18.1	23.0
TV Today	18.3	16.5	16.4	9.5	11.5
Bella	6.5	10.8	11.5	12.3	11.4
Bild der Frau	13.7	23.1	17.7	25.9	24.0

Table 2 continued

Frau im Spiegel	8.4	11.8	11.0	17.5	15.6
Laura	4.8	8.6	12.8	9.9	9.2
Lisa	6.1	9.6	12.0	9.6	9.2
Tina	8.8	15.5	15.6	19.7	17.8
Brigitte	24.4	27.8	20.1	22.6	23.4
Freundin	21.6	27.4	20.8	20.4	21.4
Für Sie	17.4	22.4	18.4	20.4	20.2
Journal für die Frau	12.0	15.5	12.8	13.2	13.3
Allegra	6.7	7.0	4.8	2.3	3.4
Amica	11.4	11.5	7.6	3.3	5.3
Cosmopolitan	15.3	15.4	13.4	6.4	8.7
Elle	8.1	10.0	6.4	4.0	5.3
Maxi	6.3	9.7	9.0	3.9	4.9
Petra	9.3	14.2	12.7	8.7	9.5
Vital	4.2	6.0	5.3	4.4	4.6
Vogue	11.4	12.3	8.9	5.6	7.2
Eltern	13.4	14.4	12.6	9.0	10.2
Familie & Co.	6.2	5.7	7.3	3.3	4.0
Bravo	16.8	21.0	19.9	11.2	13.1
Playboy	21.4	18.4	9.9	8.8	11.5
Cinema	14.6	15.6	9.9	4.0	6.8
Fit For Fun	16.9	13.5	16.3	4.2	7.1
Max	13.2	11.9	3.8	2.9	5.2
Mens' Health	9.1	6.0	3.5	1.1	2.7
Tomorrow	15.6	2.6	6.9	0.8	2.9
Prinz	10.2	8.0	4.0	1.9	3.7
Auto Bild	29.0	27.3	27.7	18.5	21.0
Auto Motor und Sport	28.8	26.7	22.8	13.9	17.4
Motorrad	8.9	8.8	8.2	3.3	4.7
Sport Bild	21.9	24.9	23.8	15.8	17.8
Kicker Sportmagazin	19.2	16.6	23.2	12.9	14.3
Geo	44.8	38.2	31.1	17.7	23.6
Computer Bild	37.7	23.0	33.2	6.7	12.9
C't Magazin für Computertechnik	17.1	4.5	5.5	0.5	3.1
Chip	24.2	8.1	8.6	1.1	4.9
PC Magazin	13.7	5.4	10.3	1.4	3.5
PC Welt	25.9	9.2	19.7	2.0	6.1
Börse Online	9.4	4.4	5.7	1.7	3.0
Wirtschaftswoche	22.0	13.9	12.0	4.5	7.8
Capital	25.8	18.6	15.0	7.6	11.3
DM	14.3	10.3	6.2	5.3	7.0
Total	**1163.0**	**1089.3**	**985.2**	**731.0**	**830.2**
(Index)	(140)	(131)	(119)	(88)	(100)

Source: AWA-FAME 1998-2000 Study

Summarizing, it can be seen that:

- 38 percent of new internet users belonged to the broadest readership of at least twelve of the magazines, while this applies to 42 percent of constant users and 24 percent of the population at large;
- 26 percent of newcomers were among the broadest readership for seven to eleven titles (27 percent of constant users, 23 percent of the population at large);
- 36 percent were readers of six or fewer magazine titles (31 percent of constant Internet users, 53 percent among the population).

While new Internet users show an attachment to print magazines almost as strong as Internet pioneers, they used the Internet far less intensely than the pioneers (Table 4). Newcomers used the Net more narrowly and were less interested in the various offerings in the Net – with the exception of entertainment (games, music, videos), which they show themselves more open to (39 vs. 36 percent, Table 3). Their relatively strong need for entertainment was already expressed before they began to use the Internet: 41 percent of new Internet users watched at least three hours of television a day (as compared to 31 percent of early users), and 32 percent of them (27 of the early users) listened to the radio for at least three hours a day.

Table 3: New Users are Not as Strongly Interested in Internet Offerings as the Pioneers

Question wording: "The Internet makes very many offerings. You can use it for various purposes. In which of the following fields are you especially interested. Please tell me after this list."

	Internet users	
	Constant	New
	%	%
Communication (e.g. e-mail, chats, discussion groups)	61	47
Dictionaries, data bases	59	46
Leisure time and services (e.g. event schedule, timetables for trains and planes, weather report, cinema program, television program)	52	42
Information on products and services (e.g. business information, product offers, comparing prices)	46	36
Money and finances (e.g. online banking, stock exchange rates and trade, investment)	40	29
News (e.g. politics, business, culture, sports)	38	31
Computer (e.g. softwar, hardware, applications)	38	24
Entertainment (e.g. games, music, videos)	36	39
Job and career (e,g. job offers, trade information)	36	30
Buying and ordering (e.g. purchase of goods, ordering of tickets, booking of travel)	35	28
Auctions	11	7
Lotteries, competitions	6	5
Erotic content	6	5
Total	464	369
None of these	1	4

Source: AWA-FAME 1998-2000 Study

Table 4: Newcomers used the Internet less intensely

		Internet users	
		Early	New
		%	%
Reported using the Internet	daily, almost daily	36	13
	once or more per week	37	25
	once or more per month	14	20
	less frequently	13	42
		100	100
Reported having last used the Internet	yesterday	45	19
	in the last 7 days	34	30
	8 to 14 days ago	8	14
	3 or 4 weeks ago	6	16
	longer ago than that	7	20
	no answer	x	1
		100	100

Source: AWA-FAME 1998-2000 Study

This is still true for the most recent newcomers to the Internet. ACTA 2001 shows that:

- of those who have been online for less than a year, only 23 percent log in daily or almost every day;
- among those who have used the net for more than a year but less than two, 39 percent log in daily;
- among those with Internet experience of three to five years, 66 percent are online daily;
- of those who have been on the Net even longer than that, 75 percent use it daily, or almost every day.

And a duration of daily internet use of more than an hour is reported by

- 31 percent of most recent newcomers,
- 37 percent of those who have been on the Net for more than a year but less than two,
- 47 percent of those with Internet experience of three to five years,
- and 52 percent who have used the Net for more than five years.

Moreover, recent newcomers to the Internet relatively seldom need it for their work:
- only 24 percent of them use it for job-related purposes;
- this applies to 42 percent of those on the Net for more than a year but less than two,
- to 58 percent of those with an experience of three to five years,
- and to 78 percent who have used the Internet for more than five years.

This means that the new Internet users were inclined more to a weak than to a strong intensity of Internet usage.

Print Media Portals: Development of Coverage

In line with the on-going distribution of the Internet, most portals run by print media reach an increasing number of users: Among 18 sites covered by ACTA 2001 (and before),
- Focus Online had the largest share of users, reaching 6.2 percent of the population aged 14-64, and DM Online with 1.3 percent had the smallest.
- Based on onliners only, this means that Focus Online is used by 16.0 percent of them, and DM Online by 3.4 percent.

As for the development of coverage of the portals that we have investigated, we refer
- first at the overview based on the total population (Table 5)
- and then at the development of coverage among onliners. The two tables show that the print media portals, in absolute terms, reach more people in 2001 than ever before, but this does not mean in any way that their market shares among onliners had to increase; in fact market shares decreased considerably for many portals (Table 6).

Table 5: Development of Coverage of Print Media Portals

	Total population aged 14-64							
	1998		1999		2000		2001	
	%	Mio.	%	Mio.	%	Mio.	%	Mio
Population total		48.51		48.28		48.46		48.25
Belonging to broadest user segment of								
Focus Online	3.4	1.65	4.2	2.00	6.4	3.12	6.2	3.01
Spiegel Online	2.7	1.32	3.8	1.83	5.2	2.51	5.5	2.64
Stern.de	1.9	0.93	2.7	1.28	4.3	2.09	5.5	2.66
TV Spielfilm online	1.5	0.72	1.4	0.65	2.1	1.00	3.2	1.54
Cinema online	-	-	-	-	2.9	1.39	4.7	2.26
Fit for fun online	-	-	-	-	1.7	0.84	3.2	1.52
Tomorrow online	-	-	-	-	3.3	1.62	4.3	2.10
Online Today online	-	-	-	-	1.6	0.77	2.0	0.97
Com-online.de	-	-	-	-	1.7	0.82	1.8	0.85
Chip online	2.3	1.13	2.2	1.06	2.7	1.33	3.3	1.61
PC Welt online	1.8	0.88	2.2	1.09	2.5	1.23	4.1	1.99
DM online	1.2	0.58	1.0	0.51	1.5	0.71	1.3	0.65
Wirtschaftswoche heute	1.3	0.61	1.7	0.81	2.0	0.95	2.5	1.21
Die Zeit online	1.3	0.62	1.5	0.73	1.7	0.85	2.8	1.36
Handelsblatt.com	1.4	0.68	1.8	0.85	2.0	0.96	2.6	1.25
Süddeutsche Zeitung online	-	-	1.0	0.50	1.7	0.84	3.1	1.50
Die Welt online	1.3	0.63	1.2	0.58	1.5	0.73	2.2	1.04
Bild online	1.3	0.63	1.4	0.66	2.6	1.26	4.1	1.96

Source: Allensbach Computer and Telecommunications Analysis (ACTA)

Table 6: Development of Coverage of Print Media Portals Among Onliners

	Onliners total							
	1998		1999		2000		2001	
	%	Mio.	%	Mio.	%	Mio.	%	Mio
Onliners total		5.52		7.83		13.43		18.85
Belonging to broadest user segment of								
Focus Online	29.9	1.65	25.6	2.00	23.2	3.12	16.0	3.01
Spiegel Online	23.8	1.32	23.3	1.83	18.7	2.51	14.0	2.64
Stern.de	16.9	0.93	16.4	1.28	15.6	2.09	14.1	2.66
TV Spielfilm online	13.1	0.72	8.3	0.65	7.5	1.00	8.1	1.54
Cinema online	-	-	-	-	10.4	1.39	12.0	2.26
Fit for fun online	-	-	-	-	6.3	0.84	8.1	1.52
Tomorrow online	-	-	-	-	12.0	1.62	11.1	2.10
Online Today online	-	-	-	-	5.7	0.77	5.2	0.97
Com-online.de	-	-	-	-	6.1	0.82	4.5	0.85
Chip online	20.4	1.13	13.5	1.06	9.9	1.33	8.6	1.61
PC Welt online	15.9	0.88	13.9	1.09	9.1	1.23	10.6	1.99
DM online	10.5	0.58	6.5	0.51	5.3	0.71	3.4	0.65
Wirtschaftswoche heute	11.0	0.61	10.4	0.81	7.1	0.95	6.4	1.21
Die Zeit online	11.2	0.62	9.3	0.73	6.3	0.85	7.2	1.36
Handelsblatt.com	12.3	0.68	10.8	0.85	7.1	0.96	6.6	1.25
Süddeutsche Zeitung online	-	-	6.4	0.50	6.3	0.84	8.0	1.50
Die Welt online	11.4	0.63	7.5	0.58	5.4	0.73	5.5	1.04
Bild online	11.3	0.63	8.5	0.66	9.4	1.26	10.4	1.96

Source: Allensbach Computer and Telecommunications Analysis (ACTA)

Portals Run by Print Media: Visited Mostly by Their Readers

In recent years it has been shown time and again that print media internet portals continue to be used by readers of the corresponding print editions to an especially great extent.

For instance: Among the readers (per issue) of the weekly magazine STERN (a magazine among those with the highest level of coverage in Germany),
- 3.8 percent were also users of the portal stern.de (broadest user segment) in 1998, while among non-readers of STERN, only 1.8 percent visited the Internet portal;
- in 1999, the respective shares were 6.0 and 2.3 percent,
- in 2000, 7.9 and 4.0 percent,
- and in 2001, 10.2 and 5.1 percent.

That is to say: stern.de was always used by the readers of the print title to a considerably higher extent than by non-readers. Considering however the absolute numbers of persons reached in 2001,
- the 10.2 percent of users among readers equal 0.69 million people, while
- 5.1 percent of users among non-readers equal 2.23 million, meaning that stern.de, in absolute terms, has more users among non-readers than among readers of the magazine.

The importance of print media Internet portals can be evaluated more justly when tested on the basis of onliners, the segment, in other words, who have a chance of using the portals:

- among readers of STERN who were also onliners, 22.1 percent belonged to the broadest user segment of stern.de in 1998; among the respective non-readers, 16.0 percent belonged to that segment;
- in 1999, the respective relations were 24.6 to 14.8 percent,
- in 2000, 20.6 to 14.8,
- and in 2001, 19.8 to 13.3 percent.

This pattern is similar for most online portals run by print media, as the following overview shows. That is to say: Loyalty to the portals is strongest among those who also read the respective print medium. Readers' loyalty has weakened for some of the portals, but much less so than for non-readers. This can already be read from the totals for the shares of portal users,
- which increased for readers from some 360 percent in 1998 and 1999 to almost 450 percent in 2000 and 2001,
- while sinking for non-readers from some 157 to about 150 percent, although from 2000 on, five more portals were asked about.

How strongly non-readers' affinity to portals evaporated becomes even clearer from the following index computations: When the shares of Internet portal users among readers is summed up for each year and set at an index value of 100, and then compared to a corresponding sum for non-readers in the same year, the portals' coverage among non-readers amounted to merely

- 47.5 in 1998, that is to say: was only half as wide as for readers;
- by 1999 it had sunk to 40,
- by 2000 to 35.3, and
- in 2001 to just 32.4 (Table 7).

Table 7: Use of Internet Portals Among Readers and Non-readers

	Onliners who read ...				do not read ... ... the respective print media title			
	1998	1999	2000	2001	1998	1999	2000	2001
Share of portal users of respective title								
Focus	38.3	32.4	30.2	22.2	29.2	24.9	22.5	15.5
Der Spiegel	32.8	32.7	26.8	23.3	22.4	21.8	17.3	12.7
Stern	22.1	24.6	20.6	19.8	16.0	14.8	14.8	13.3
TV Spielfilm	26.8	17.5	16.0	15.4	10.2	6.1	5.5	6.5
Cinema	-	-	30.3	38.3	-	-	9.2	10.6
Fit for fun	-	-	19.7	30.0	-	-	5.5	6.6
Tomorrow	-	-	42.2	34.9	-	-	10.2	10.0
Online Today	-	-	18.6	20.4	-	-	5.3	4.8
Com-online	-	-	29.7	27.1	-	-	5.3	4.0
Chip	45.2	41.2	42.2	39.4	17.9	10.9	7.7	6.9
PC Welt	29.9	39.1	30.7	35.1	14.2	10.9	7.4	9.1
DM	30.1	22.2	27.2	18.9	9.8	5.8	4.6	3.1
Wirtschaftswoche	30.7	29.5	22.1	24.1	10.2	9.6	6.6	6.0
Die Zeit	27.3	22.8	16.4	24.2	10.5	8.5	5.8	6.6
Handelsblatt	35.9	38.8	18.2	22.5	12.2	10.4	7.1	6.5
Süddeutsche Zeitung	-	25.1	17.3	21.6	-	5.8	5.9	7.6
Die Welt	26.4	20.4	12.3	13.8	11.2	7.4	5.4	5.5
Bild	20.8	15.1	17.0	16.6	10.3	7.6	8.2	9.5
Total	366.3	361.4	437.5	447.6	174.1	144.5	154.3	144.8
Index	100.0	100.0	100.0	100.0	47.5	40.0	35.3	32.4

Source: Allensbach Computer and Telecommunications Analysis (ACTA)

Do Readers Become More or Less Loyal to a Print Title After Visiting Its Portal?

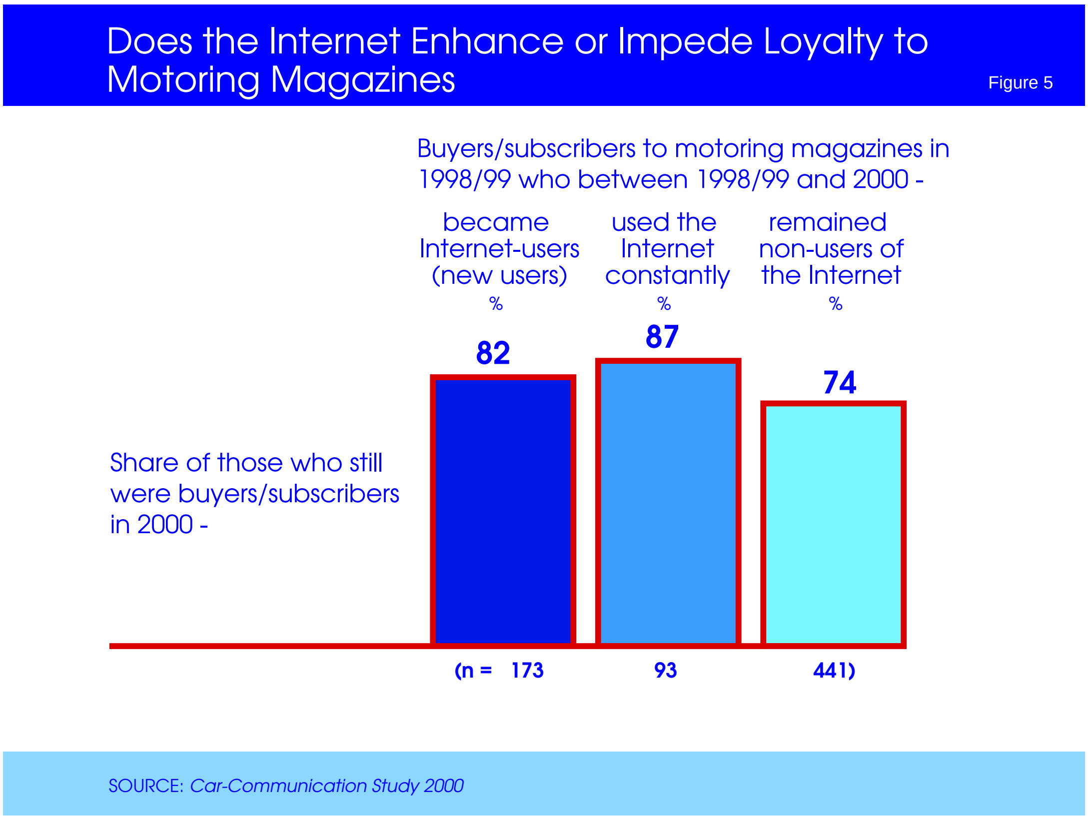
In a panel of the special segment of buyers of (and subscribers to) motoring magazines, interviewed face-to-face in the winter of 1998/99 and the summer of 2000, it was shown that

- readers of the three leading titles remained (to 95 percent on average) loyal to their magazine when they had also visited the magazine's Internet portal very early (before 1998/99),
- while only 75 percent of readers who had had no contact with their magazine's portal continued to buy the print magazine.

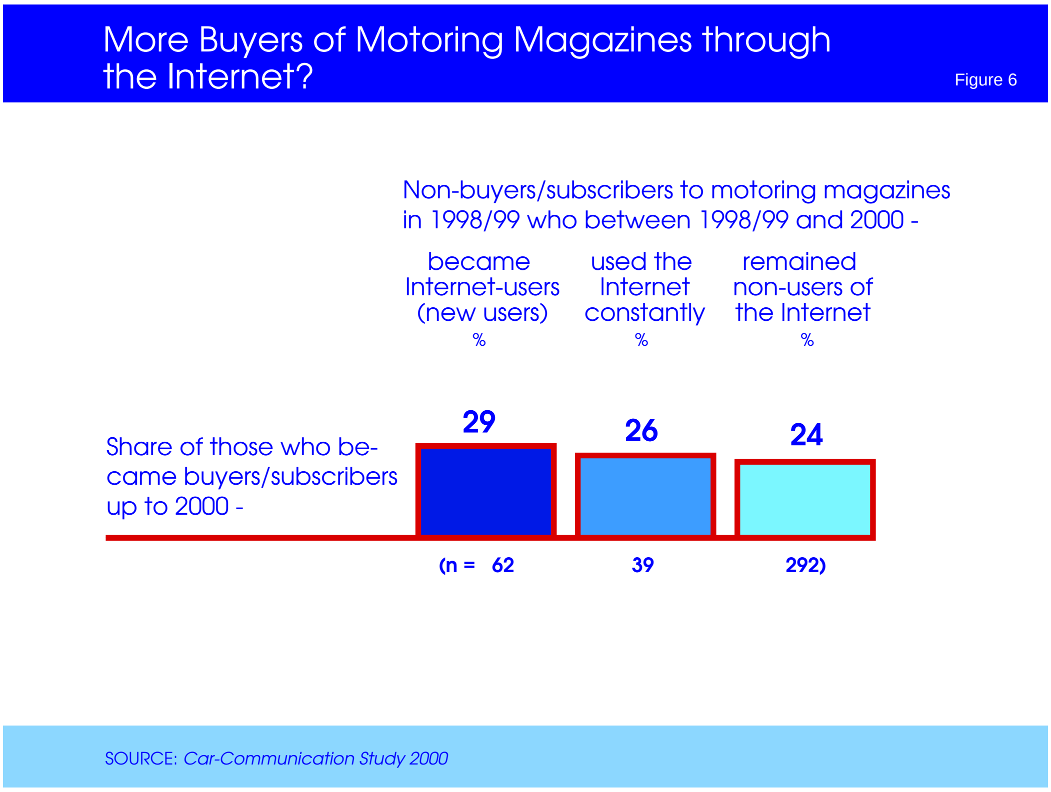
Statistically, analyses of very early users of Internet portals and readers of the respective magazines are naturally based on relatively few cases.[1] But at least it can be said that up to 2000 there was no hint that buyers of special interest magazines who had not yet used the Internet in 1998/99 turned away from these magazines when they began to use the Net:

- constant Internet users displayed the greatest loyalty to the particular segment of motoring magazines (with 87 percent continuing to read titles in this segment),
- followed by recent newcomers, 82 percent of whom remained in the segment, wheareas
- constant non-Internet users were most likely to abandon the segment; only 74 percent remained with the segment (Figure 5).

[1] In this panel of n = 715 respondents, there were 16, 9 and 22 readers of the three leading motoring magazines who had early on used the portal of the magazie they read. In total, these are 47 cases. To a degree of 95 percent, they remained loyal to their magazine. The bases for the corresponding groups of readers without contact to the portal of their magazine were 491, 604, and 516.



With regard to readership gains in the segment from 1998/99 to 2000, new Internet users represented the largest share of new readers (29 percent), followed by constant Internet users (26 percent), while constant non-users of the Internet trailed at 24 percent (Figure 6).



When it is primarily the readers of a print medium who are strongly attached to this medium's Internet portal, then it is clear to what great extent consumers (want to) conceive electronic and print offerings of a particular title as a unit or brand. What consequences Internet and print providers who use the same name may draw from this shall not be discussed further here. For print titles it can be said, though: The more the profile of the Internet offering is seen as resembling the print title, the fewer problems both (electronic and print version) should have in getting their offering accepted by users – and readers may consider the electronic version as a valuable additional source. If, however, the Internet portal is less convincing than the print version, this may result in a negative image transfer to the print title.

As important as these considerations about the positioning of media outlets may be: With an increasing distribution of the Internet, successful portals run by print media will have to adjust to the fact that, in absolute terms, they will draw an increasing number of visitors who have no or just a loose relationsship with the print version itself.

Print Media Internet Portals – Important but Not Sufficient

"Inform myself about something, retrieve information" is always among the most frequently reported reasons for going online (only e-mailing is indicated more often); and eight in ten onliners use the Internet for finding information. The fact that information search is not at all limited to the Internet is also well known to onliners:

- Asked about information sources "when you want to inform yourself more closely and comprehensively," onliners more often than non-onliners name daily newspapers, magazines and special interest magazines. Moreover, they read books by far more frequently. That is to say, onliners are especially inclined to reading, without abstaining from television and radio: They use these two media at least as often as non-onliners for information.
- The concrete coverage rates measured for several hundred print media affirm these self-reports: Almost half of the onliners belong to the broadest readership of more than twenty magazines, while this can be said of only a fourth of non-onliners.
- 40 percent of onliners read three or more dailies, while merely 22 percent of non-onliners do.
- But also for television, onliners have a broad horizon: 40 percent of them use at least nine different channels in a month, whereas only 25 percent of non-onliners view so many different channels.

Even if these percentage shares are affected by the fact that onliners still belong to higher social classes and are still younger than non-onliners, the basic results are confirmed by a similar analysis for persons under 50 who belong to the upper or upper middle class. Onliners' much broader than average spectrum of interest is also present in this group, as is the observation that the broad spectrum of interest is related to a practically doubled level of activity, as compared to non-onliners (Table 8).

Table 8: Onliners are Very Active, Broadly Interested and Inclined to the Media, to Commuication and Reading – on the Web and Outside

	Total population 14 years and over				Upper and upper middle class under 50 years			
	Onliners %		Non-onliners %		Onliners %		Non-onliners %	
Said purpose of Internet use was "search for information, research"	77				83			
Name as source for acquiring information "when you want to inform yourself more closely and comprehensively"								
Read newpaper articles	61		58		62		58	
Read magazine articles	57	161	41	122	56	164	47	138
Read magazines specialized on this topic	43		23		46		33	
Watch for reports in TV on this topic	65		68		62		64	
Watch for reports on the radio	26		28		24		25	
Buy specialized book in bookstore	32	57	20	33	36	51	29	51
Go to the library	25		13		25		22	
Contact companies, associations, clubs	27		16		30		23	
Subtotal	*336*		*267*		*341*		*301*	
Search the Internet	75		3		79		6	
Ask family friends, acquaintances	76		77		76		79	
Media horizon: magazines								
Very wide (belong to broadest readership of 38 or more titles)	16	43	8	25	17	46	12	34
21-37 titles	27		17		29		22	
8-20 titles	40		42		39		39	
4-7 titles	12		20		10		17	
Very narrow: 0-3 titles	5		13		5		10	
Total	*100*		*100*		*100*		*100*	
Media horizon: daily newspapers								
Very wide (belong to broadest readership of 5or more titles)	17	40	6	22	19	45	8	26
3-4 titles	23		16		26		18	
2 titles	24		32		24		31	
1 title	28		38		25		35	
Very narrow: 0 titles	8		8		6		8	
Total	*100*		*100*		*100*		*100*	
Media horizon: television								
Very wide (have seen 11 or more programs in 4 weeks)	16	40	7	25	16	39	11	31
9-10 programs	24		18		23		20	
5-8 programs	43		50		42		48	
3-4 programs	10		16		11		12	
Very narrow: 2 or fewer programs	7		9		8		9	
Total	*100*		*100*		*100*		*100*	
Spectrum of interests								
Very broad	22	43	13	28	23	46	17	36
Broad	21		15		23		19	
Average	34		33		33		34	
Narrow	16		22		15		19	
Very narrow	7		17		6		11	
Total	*100*		*100*		*100*		*100*	
Activity index								
Very active	50		25		58		37	
Active to an average extent	34		33		30		39	
Not very active	16		42		12		24	
Total	*100*		*100*		*100*		*100*	

Source: AWA 2001

There are hints that future onliners, especially if they are young, will not have as strong an attachment to print media as today's onliners.[2] When you look at the gross amount of magazines reaching onliners, it is not as large today as it was in the late nineties:

- In 1999, 40 percent of onliners had a very high or high usage of magazines (two upper points on a 5-point-scale based on computing the total number of issues read per year);
- in 2000, 39 percent and
- in 2001, 36 percent of onliners were in this high usage group,

while the shares among non-onliners largely remained the same (29, 28, and 28 percent). (In the upper and upper middle classes, these shares moved from 43 to 42 to 38 percent among onliners and from 31 to 33 to 32 percent among non-onliners.) That is to say, magazine consumption among onliners will tend to decrease, but is still considerably higher than among non-onliners.

This is not the place to draw a comprehensive psychographic portrait of onliners and their interests and behavior towards the Internet. Their inclinations can be summed up in notions such as plurality, intensity, activity, thirst for knowledge, and broad horizons.[3] The Internet is an important medium for onliners – but so far the demands of most of them have been too high to make them abandon print media to any considerable degree.

[2] Rüdiger Schulz, Johannes Schneller: "AWA 2001 Neue Muster der Mediennutzung in der jungen Generation." Vortrag zur AWA-Präsentation im Juli 2001 in Hamburg. Published under www.awa-online.de

[3] For more detail see: Jochen Hansen: How new and different are costumers in the digital marketplace? In: The Impact of Networking – Marketing Relationships in the New Economy, ESOMAR Congress 2000, Vienna (Austria). Amsterdam 2000, pp. 75-100.

Appendix

Demographic Structure of Constant, New and Transferring Internet Users and Constant Non-users

	Internet user groups				Population at large
	Constant users	New users	Transferring users	Non-users	
	%	%	%	%	%
Men	65.6	53.3	54.8	43.8	47.7
Women	34.4	46.7	45.2	56.2	52.3
Age					
14-19	12.7	19.0	13.4	4.9	7.7
20-29	25.1	21.9	16.8	9.7	13.2
30-39	29.1	22.2	26.4	16.3	18.8
40-49	20.2	20.9	26.1	14.9	16.5
50 and over	12.9	15.9	17.2	54.1	44.0
Education					
Basic	15.5	25.9	25.8	56.0	47.0
Intermediate-level	35.9	42.0	53.4	31.0	33.3
Higher-level, university	48.7	32.0	20.8	13.0	19.7
Employment status					
Employed	70.6	59.9	66.3	42.9	48.7
Student, in training	21.4	23.5	17.2	5.5	9.8
Not employed	7.9	16.6	16.5	51.6	41.5
Occupation (self or main wage earner)					
Owner, self-employed, professional	13.2	12.6	12.7	8.2	9.4
Farmer	0.3	0.6	1.2	2.3	1.8
Upper level white collar and civil servants	24.0	17.9	16.0	12.3	14.5
Other white collar and civil servants	45.6	43.2	48.5	37.7	39.5
Skilled workers	13.3	16.6	15.2	23.8	21.5
Semi-skilled workers	3.6	9.1	6.5	15.6	13.2
Main provider's income:					
Under 3,000 DM	37.6	44.7	46.4	63.9	58.1
3,000 to under 4,000 DM	24.4	25.0	16.7	21.4	22.1
4,000 to under 5,000 DM	15.6	13.5	14.5	7.5	9.4
5000 DM or more	22.4	16.8	22.4	7.1	10.4
Household income					
Under 2,000 DM	6.8	6.4	6.9	13.9	12.0
2,000 to under 3,000 DM	12.4	12.1	20.8	23.3	20.6
3,000 to under 4,000 DM	15.0	17.9	12.9	24.6	22.4
4,000 to under 5,000 DM	17.4	19.0	17.1	16.2	16.7
5,000 to under 6,000 DM	18.2	18.0	10.3	10.6	12.4
6,000 DM or more	30.3	26.6	31.9	11.4	15.9
Disposable income					
Less than 200 DM	30.1	32.4	32.0	31.7	31.6
200 to under 400 DM	15.5	19.4	17.7	20.5	19.7
400 to under 600 DM	16.0	18.0	22.5	19.4	18.9
600 to under 1,000 DM	7.5	7.9	9.0	8.2	8.1
1,000 to under 1,500 DM	15.1	10.7	10.5	10.9	11.4
1,500 DM or more	15.9	11.6	8.2	9.3	10.3
West-Germans	84.4	82.3	84.4	78.2	79.6
East Germans	15.6	17.7	15.6	21.8	20.4
Population of place of residence (BIK):					
Less than 10,000 people	14.4	19.7	22.9	23.6	22.0
10,000 to 50,000	16.0	17.2	18.2	18.5	18.1
50,000 to 100,000	3.4	3.9	5.9	5.1	4.8
100,000 or more	66.2	59.1	53.0	52.7	55.1

Source: AWA-FAME 1998-2000 Study