

READERSHIP IN THE AGE OF THE INTERNET

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Abstract

The British NRS has been measuring the growth of Internet usage since 2000, alongside readership of around 240 print titles. There is therefore a great deal of data available to help understand what impact the Internet has had upon print readership.

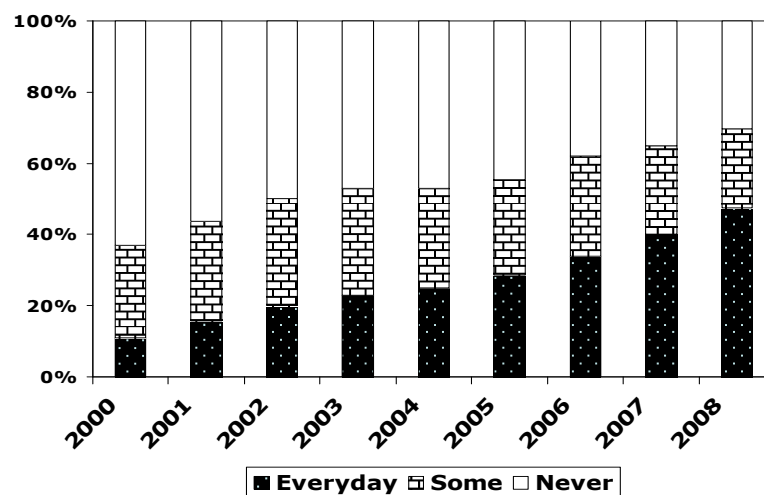
It is not possible to do this with a simple cross-analysis. Over time, both the number and profile of heavy Internet users have changed, so we cannot make a like for like comparison of readership penetration within this group between 2000 and the present day. This paper outlines an alternative analysis technique to help understand what impact the Internet has had on print readership.

The paper concludes that for those genres of publication which have lost readership over the past eight years the Internet is likely to have been one of a number of factors, but it is by no means the sole, or even dominant, factor. Furthermore, in some cases there are indications that publishers have been successful in deploying strategies to help maintain readership.

The growth of Internet usage

Almost three-quarters of the UK population have accessed the Internet in the last 12 months. Much of the analysis in this paper is based on those using the Internet everyday, now around half the population, as it is these people for whom one would expect the Internet to have had the biggest impact. The chart below shows how everyday usage is becoming the norm for those who use the Internet.

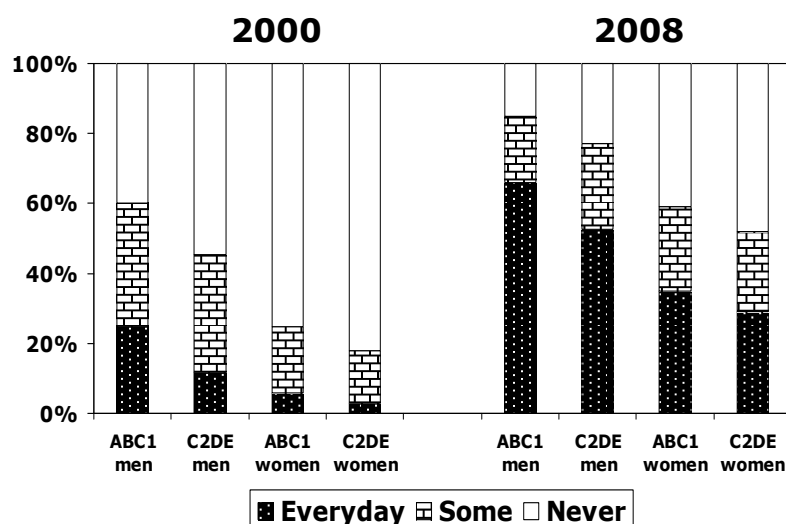
Internet usage



Of course, there are still pockets of the population for whom the Internet is either irrelevant, or out of reach for economic or geographical reasons. The British Government has made it a target for all British homes to have access to fast broadband by 2012, though it remains to be seen whether this will be achieved.

Over the last eight years usage has increased among all demographic groups, but it is still much more likely to be used frequently by men, especially ABC1 men. When considering the implications for readership, it is worth remembering that less than a third of women use the Internet everyday, in contrast to over 60% of men.

Internet usage



Readership by level of Internet use

When the NRS started measuring usage of the Internet in 2000, it was clear that the early adopters also tended to be heavy consumers of print media. They were particularly likely to be readers of the quality daily and Sunday newspapers, news and analysis magazines such as *The Economist*, and music, motoring and men's magazines. This was not surprising given that everyday Internet usage was very much skewed towards ABC1 men at that time.

It remains the case that everyday Internet users make more readership claims than less frequent users, and Internet users make more claims than non users, but these distinctions have become less pronounced over time, as one would expect.

Tables 1 and 2 show the indices of Average Issue Readership by level of Internet use, relative to the population as a whole, comparing the year 2000 with 2008. Table 1 shows gross AIR and Table 2 shows net AIR.

Table 1: GROSS Average Issue Readership (AIR) - Indices by Internet use

	Internet use		
	None	Some	Everyday
Quality daily newspapers – 2000	58	139	243
- 2008	51	88	137
Midmarket daily newspapers – 2000	95	107	113
- 2008	122	109	86
Popular daily newspapers- 2000	112	87	65
- 2008	123	102	85
Quality Sunday newspapers – 2000	58	146	232
- 2008	45	91	140
Midmarket Sunday newspapers 2000	90	118	113
- 2008	96	110	98
Popular Sunday newspapers – 2000	113	83	66
-2008	113	110	87
General weekly magazines – 2000	84	125	133
- 2008	76	110	111
General monthly magazines – 2000	72	143	158
- 2008	49	105	130
Women's weekly magazines – 2000	111	90	60
- 2008	84	116	102
Women's monthly magazines- 2000	83	135	117
- 2008	62	117	116

The indices show penetration in each Internet group relative to the total population, i.e. penetration within the total population equals 100.

Table 2: NET Average Issue Readership (AIR) – Indices by Internet use

	Internet use		
	None	Some	Everyday
Quality daily newspapers – 2000	62	141	218
- 2008	56	92	132
Midmarket daily newspapers – 2000	96	105	111
- 2008	123	101	85
Popular daily newspapers- 2000	113	85	64
- 2008	124	102	83
Quality Sunday newspapers – 2000	60	145	220
- 2008	48	92	138
Midmarket Sunday newspapers 2000	91	117	112
- 2008	97	109	98
Popular Sunday newspapers – 2000	113	83	65
-2008	112	110	88
General weekly magazines – 2000	89	119	121
- 2008	87	107	105
General monthly magazines – 2000	82	128	136
- 2008	61	107	122
Women's weekly magazines – 2000	109	93	66
- 2008	96	111	97
Women's monthly magazines- 2000	91	119	109
- 2008	75	115	109

The indices show penetration in each Internet group relative to the total population, i.e. penetration within the total population equals 100.

It is not surprising that readership penetration should be higher generally among heavy Internet users than it is among the rest of the population, given what we know about the demographic profile of Internet users.

Nor is it surprising that the indices should have flattened over time – after all, in 2008 there were more than four times as many ‘everyday’ Internet users as there were in 2000, so of course the profile of these users has changed and this is reflected in their reading behaviour.

However, we also know that over the period 2000-2008 some, though by no means all, genres of publication have experienced a decline in print readership. In some cases it is clear that the trend was in place well before the advent of the Internet. Nevertheless, the question naturally arises as to what impact the Internet has had, and may have in the future. In particular, is there any evidence that the publications most likely to be read by early adopters have proved particularly vulnerable?

This paper explores what evidence there is in the NRS data about the impact the Internet has had on the readership of print media. In other words, have the indices of readership by Internet usage flattened by a greater degree than one would expect simply from the change in the profile of Internet users?

The Internet adoption curve

It is possible to plot the relationship between readership and the developing use of the Internet. This creates an ‘Internet adoption curve’.

The following example is based on the British quality daily newspapers, publications which are particularly likely to be read by heavy Internet users. These newspapers are The Times, The Telegraph, The Guardian, The Independent and the Financial Times.

Table 3 shows net readership of these publications according to usage of the Internet, first in 2000 and then the comparative figures in 2008.

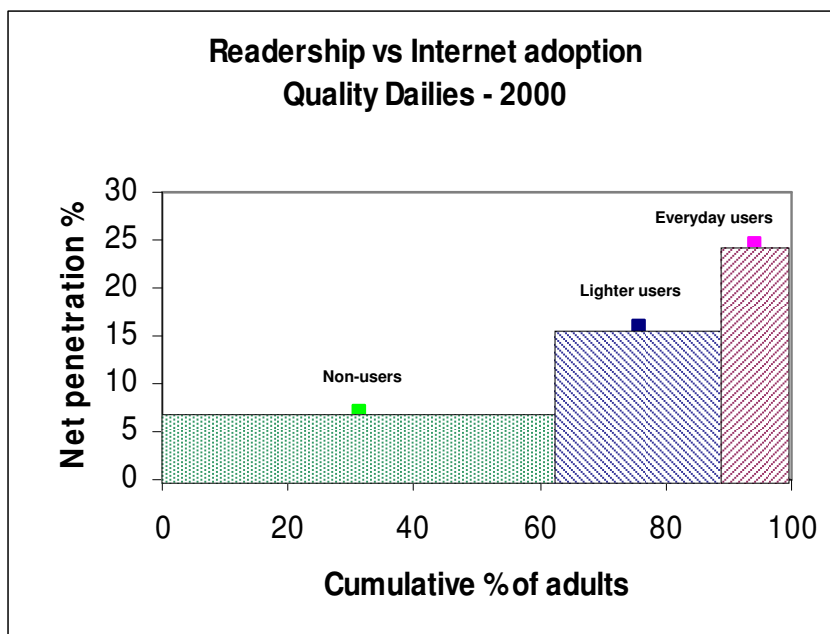
Table 3: Net readership of quality daily newspapers by Internet use

		Internet use		All adults
	None	Some	Everyday	Total
2000				
Estimated universe Adults 15+ (000s)	29,374	12,004	5,263	46,641
Net readership penetration	7.0%	15.8%	24.5%	11.2%
2008				
Estimated universe Adults 15+ (000s)	14,857	11,071	23,149	49,077
Net readership penetration	5.9%	9.7%	14.0%	10.6%

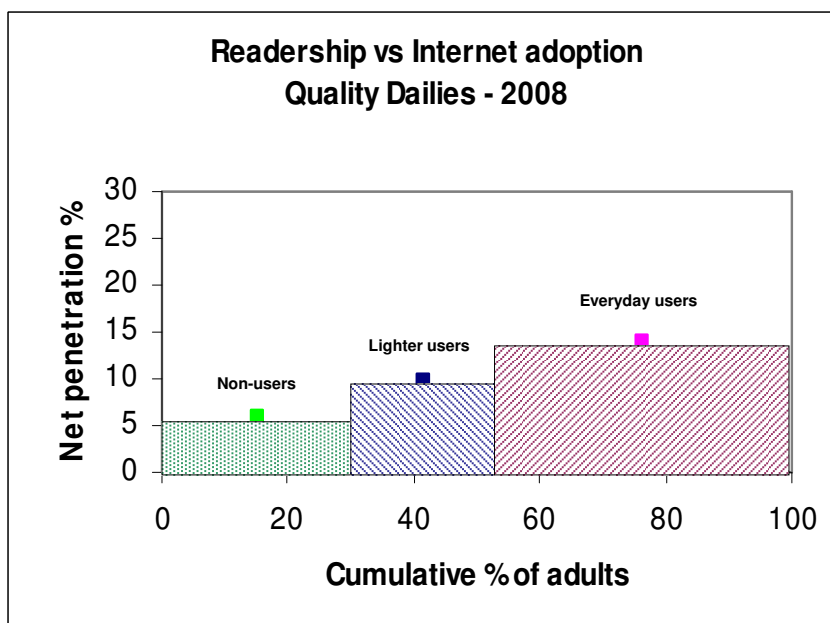
In the year 2000 the majority of the population (63%) did not use the Internet at all, while 26% made some use of the Internet, and 11% used it everyday. By 2008 the proportions were 30%, 23% and 47% respectively.

The readership penetration among everyday Internet users has fallen from 24.5% to 14.0%. However, this group is now, at 47% of the population, over four times the size that it was in the year 2000. Does the drop in penetration therefore simply reflect the change in the number and profile of these Internet users?

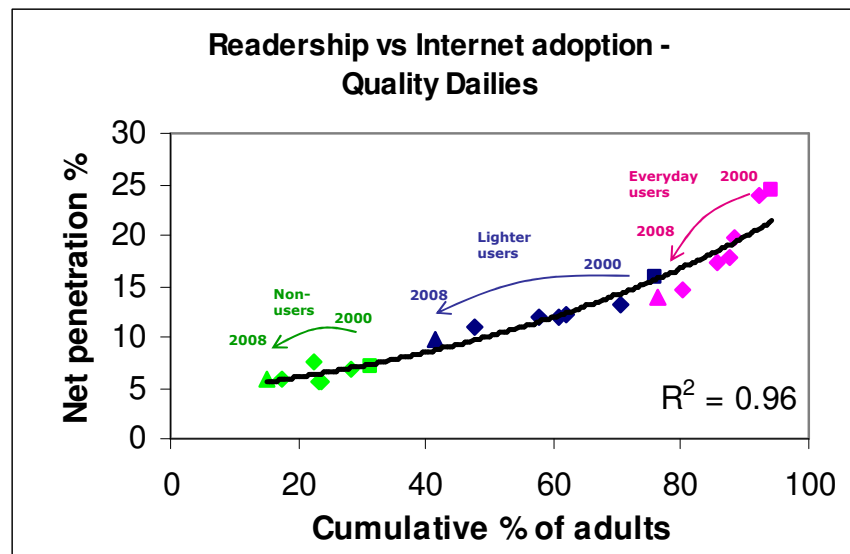
The following chart plots net readership in 2000 according the stage of Internet adoption, plotting the cumulative percent of adults on the horizontal axis.



Fast forward to 2008 and the comparative chart is as follows.



The following chart shows the same data but with 2000, 2008 and the intervening years on the same chart.¹



Starting from the **right hand** side:

- The first set of points plots the net readership of heavy Internet users from 2000 onwards (shown in pink in the colour version).
- The second set of points plots the net readership of lighter Internet users from 2000 onwards (shown in blue in the colour version).
- The third set of points plots the net readership of non-Internet users from 2000 onwards (shown in green in the colour version).

For each of the three sets of Internet users the square point at the right hand side shows net readership in 2000, while the triangle at the left hand side shows readership in 2008.

Using these data an 'Internet adoption' curve has been plotted. The curve is fitted through all the data, and therefore represents the average across the eight year period, essentially the curve for 2004.

The relatively close fit between the fitted curve and the actual data means that there is a strong relationship between readership of quality dailies and the Internet adoption curve: early adopters of the Internet are substantially more likely than late adopters to be readers of quality dailies.

Estimating the impact upon readership

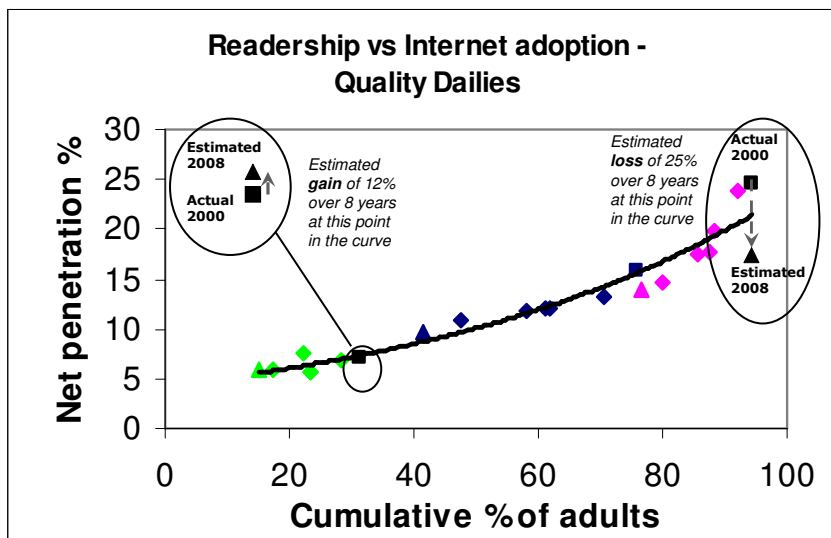
Looking at the chart above it can be seen that the start and end plots for the everyday Internet users diverge from the curve. Readership among everyday users in 2000 (the square at the far right hand side of the chart) is clearly higher than the equivalent expected figure for 2004.

This suggests that there has been an effect upon net readership among heavy Internet users. This change is likely to be related to use of the Internet, particularly as no similar change can be seen for the non-Internet users.

The divergences from the curve can be used to estimate the change in readership over time. For example, measuring the gap between the actual figure for heavy Internet users in 2000 and the estimated figure for 2004 at the same point on the curve provides an estimate of the amount of change over a four year period at this point on the curve.

¹ Data from 2006 are excluded as a change in the question meant it was not possible to use them in a comparable format. Data from 2002 are also excluded to balance the calculations.

In this case, the difference between net readership among heavy Internet users in 2000 (24.5%) and the estimated figure for 2004 at the same point on the curve (21.5%) is 3.0%. As a proportion of total readers, this represents a 12.4% loss of readers over four years, equivalent to a 25% loss of readers over the full eight year period from 2000 to 2008 (see chart below).



By contrast, towards the left-hand side of the chart, the divergences from the fitted curve for the non Internet users are much smaller. The points lie close to the curve, so it is hard to see the differences. In fact, close examination of the data shows that the fitted curve is actually slightly *above* the data point for Internet non-users in 2000, suggesting a slight *increase* in readership over time among people at this point on the curve. Because absolute levels of readership are low at this point on the curve, the differences in proportional terms are as much as 12% over eight years.

The differences in these figures for different points on the curve are the key. If we are right in estimating a *drop* in readership among heavy Internet users and a *gain* in readers among non Internet users, then this may be taken to indicate that the growth of usage of the Internet has had a substantial effect on the net readership of quality daily newspapers in the UK.

An estimate of the size of this effect can be made by calculating the relevant figures at all points along the curve, and then measuring the degree of change from low end to high end. Taking all the data into account, we estimate a loss in net readership of around 19% due to the Internet.

In fact, the **actual** overall loss in net readership of the quality dailies across this period has, at 6%, been much smaller. This suggests that the loss of around 19% due to the Internet has been offset by a gain in readers due to other factors.

The positive influences which have offset the negative impact of the Internet may be explained by the considerable efforts of the quality newspapers to evolve in the last 10 years, including the effects of promotion and marketing, a more reader-led focus in editorial, and the switch to compact editions for most.

On a technical point, this approach assumes that the size of all the other effects (i.e. non-Internet related effects) is consistent across all readers. This will not always be so: for instance lifestyle changes may have affected readership to a greater degree among people at the lower or upper end of the curve.

In some cases it may also be that the Internet has **created** audience (among those with access to it) for the print publications, by alerting potential readers as to what is on offer in print.

Limitations of the analytic method

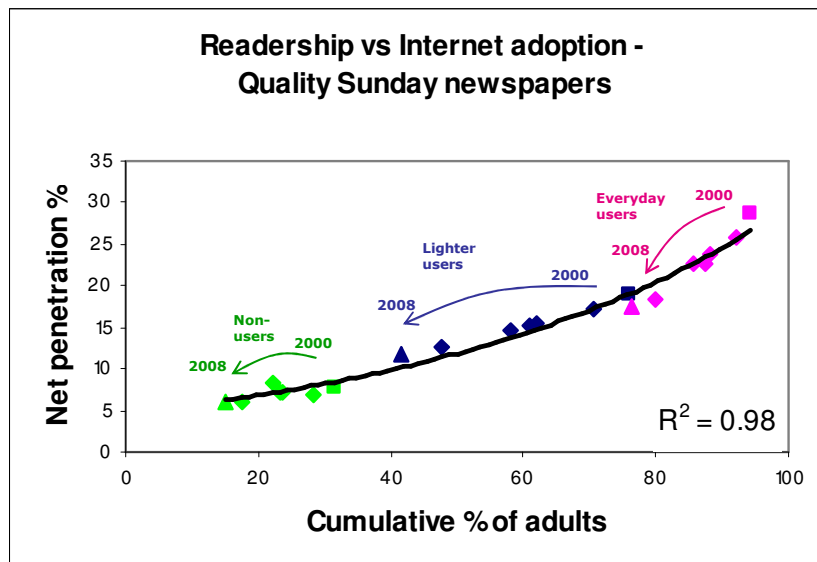
This technique to estimate the impact of the Internet is an exploratory one, and the estimates should be taken only as indications. The technique works better for some genres than others, depending upon the pattern of the adoption curve.

Particular points worth noting are:

- The robustness of method is influenced by the profile of the figures at the lower end of the Internet adoption curve. In cases where readership levels are particularly low among non Internet users there is more volatility in the analysis.
- In some cases we can see that readership is not smoothly related to Internet adoption. This is observable where the estimated level of drop for the six data points from 2000 and 2008 data is rather volatile. Such cases suggest caution is required in drawing firm conclusions.
- The graphs show a level of *correlation* between Internet adoption and readership. We are attempting to deduce cause and effect from this data, as is usual in such analyses; however there is always the possibility that there are other factors at play which may be influencing both.

The impact of the Internet on readership: more newspaper examples

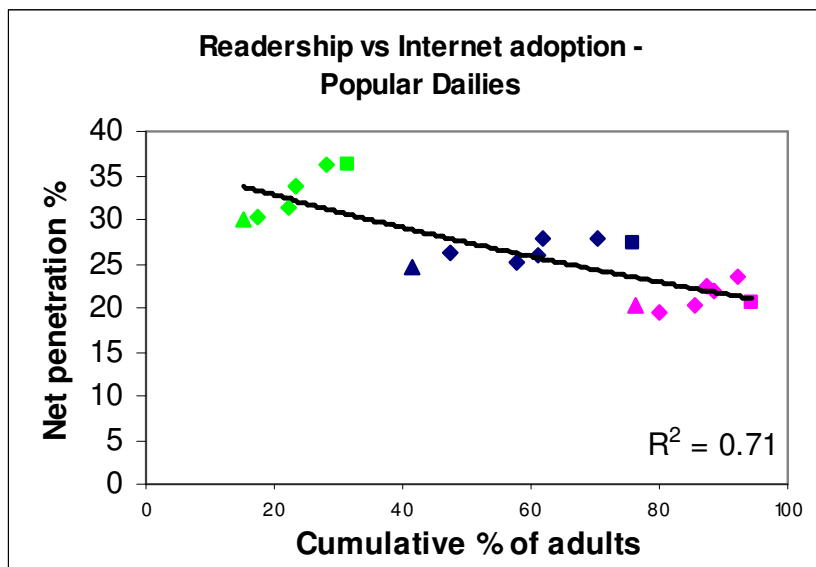
The situation for the quality Sunday newspapers is similar to that for the quality daily newspapers, though less pronounced, as the graph below shows.



The actual loss in net readership between 2000 and 2008 is just 2%. The analysis method outlined above suggests that loss due to the Internet is 10%, so the implication is again that this has been offset by a gain in readers due to other factors.

The data for the popular daily newspapers provide a contrast. These titles (The Sun, Daily Mirror, Daily Record and Daily Star) are more likely to be read by non-Internet users, so the patterns by Internet adoption look quite different.

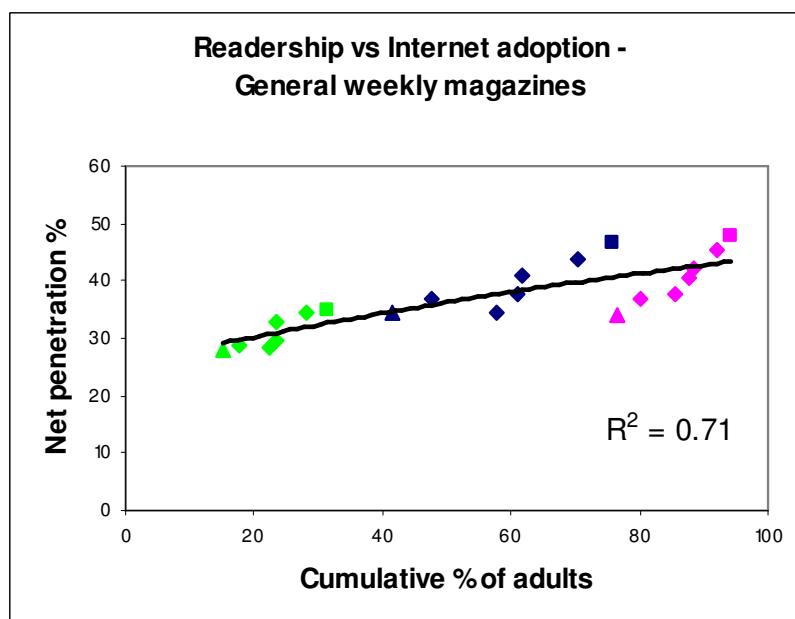
Unlike the quality dailies, there is not a strong relationship between readership of the popular dailies and the Internet adoption curve.



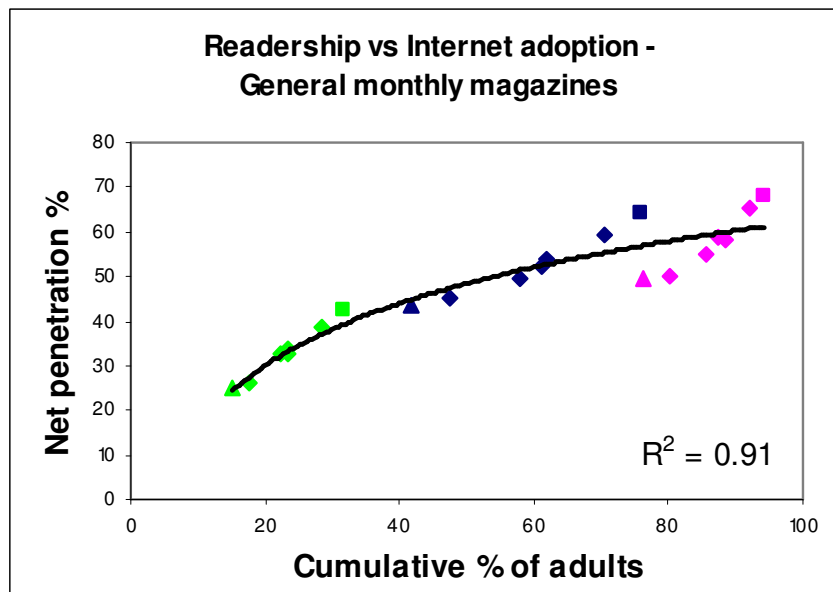
Popular dailies have seen a loss in net readership in the period 2000 to 2008. However, there is no indication that this is related to use of the Internet, and this is confirmed by the calculations. The loss of net readership has been greatest among non-Internet users, which indicates that other factors are of greater relevance to the changes in this market.

The impact of the Internet on readership: magazine examples

As one would expect from the examples already shown, the impact of the Internet on magazine readership is very varied according to genre. Starting with general weekly magazines, the actual loss in net readership for the general weeklies between 2000 and 2008 is 18%. Around half is estimated as being due the impact of the Internet.



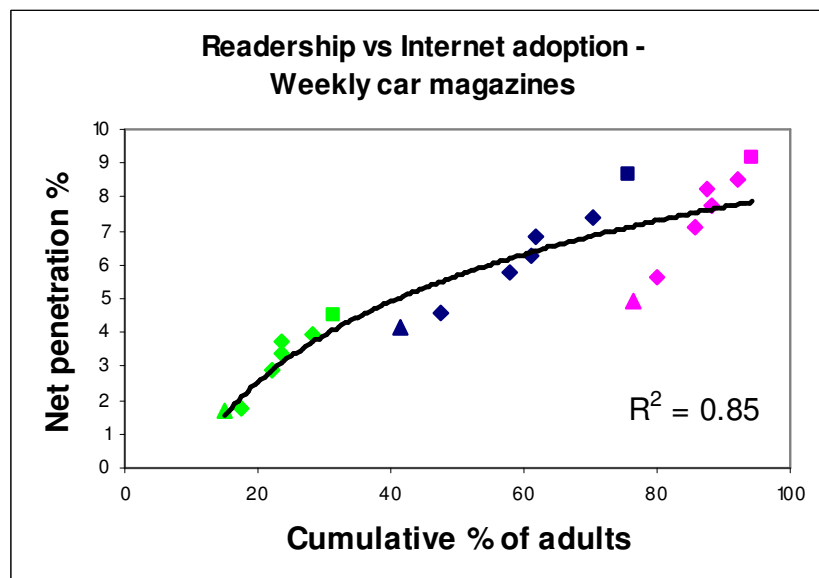
The analysis shows general monthly magazines have experienced an actual loss in net readership of 20%. Again, around half is estimated as being due to the Internet.



There are many genres of magazine, however, so the above analysis is a rather bland one.

For instance, one of the genres which might be expected to be most affected by the Internet is the weekly car magazine/trader genre, i.e. AutoExpress, Auto Trader, Autocar, Autosport and Exchange & Mart (the latter is now defunct). Auto Trader, in particular is in the front line of migration to the web given the nature of its content and adaptability to a web function. The Auto Trader website consistently posts the single largest number of unique visitors of any magazine website in the UK.

The actual fall in net readership for this genre over the period 2000 to 2008 is striking, a drop of 38%. If we plot net readership penetration against Internet adoption, however, the story is not quite so straightforward.



While the Internet certainly has had an effect, the loss of net readership for the weekly car magazines is not only a result of the Internet, and readership has also fallen among non Internet users. This is visible in the chart where the data point for Internet

non-users in 2000 lies slightly above the fitted curve. To the naked eye the gap appears small, but relative to readership penetration it is important. Overall, calculations of the estimated loss due to the Internet suggest that around half of the loss in readers is due to the Internet.

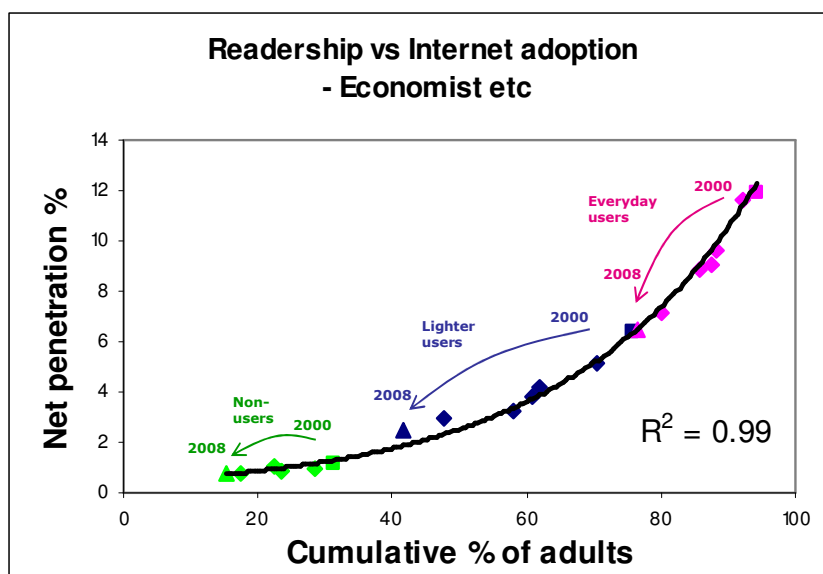
On the other hand, there is the example of a group of weekly and fortnightly magazines which appeal strongly to the heaviest users of the Internet, i.e. AB men. These are The Economist, New Scientist, Times Educational Supplement and Private Eye. Table 4 shows the change in net readership penetration by Internet use for this group of magazines.

Table 4: Net readership of the Economist etc. by Internet use

	Internet use			All adults
	None	Some	Everyday	Total
2000				
Estimated universe Adults 15+ (000s)	29,374	12,004	5,263	46,641
Net readership penetration	1.1%	6.4%	11.9%	3.7%
2008				
Estimated universe Adults 15+ (000s)	14,857	11,071	23,149	49,077
Net readership penetration	0.8%	2.5%	6.5%	3.9%

Given their popularity with early Internet adopters these publications might be considered particularly vulnerable to the erosion of readership. However, overall net readership has increased.

Clearly there have been concerted efforts by the titles concerned. Private Eye has increased its Average Issue Readership by 48% between 2000 and 2008. The Economist has achieved a 34% increase in Average Issue Readership alongside a vigorous circulation drive which has been rewarded with an increase in circulation of around 50%.



The Adoption Curve fits the data very closely, but examination of the precise figures reveals some differences. The 2008 data point for everyday users lies on or marginally *below* the curve, while for lighter users it is slightly *above* the curve (and also slightly above for non-users, though it is hard to see in this chart). It shows that there has been some impact on readership from the Internet.

The fact that, despite this, net readership has increased suggests that, like the quality daily newspapers, these publications have had some success in countering negative effects on readership.

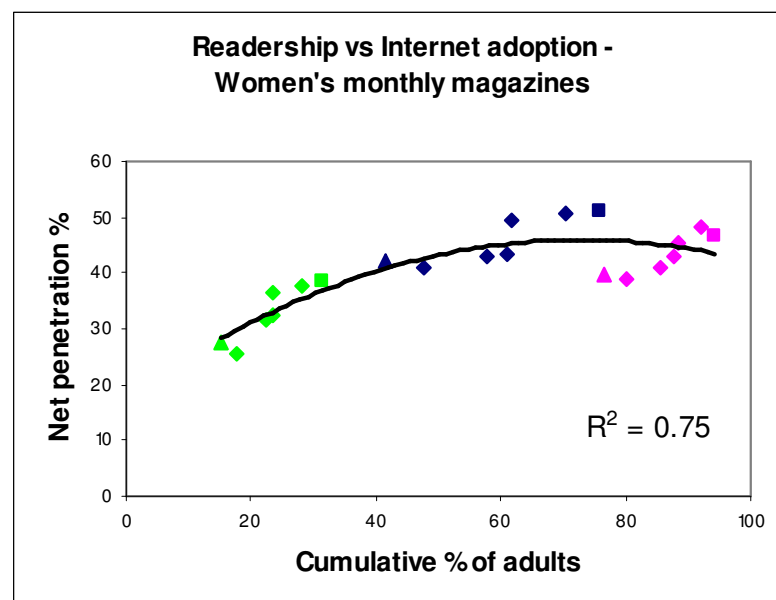
When it comes to magazines targeted at women, not surprisingly there is less evidence of an impact from the Internet than there is for general magazines.

Women's magazines were not of particular appeal to the early adopters of the Internet. Even though there are many more women using the Internet everyday than there were in 2000, it remains the case that net penetration of women's monthly magazines is higher among lighter users of the Internet, as shown in Table 5.

Table 5: Net readership of women's monthly magazines by Internet use

		Internet use		All adults
	None	Some	Everyday	Total
2000				
Estimated universe Adults 15+ (000s)	29,374	12,004	5,263	46,641
Net readership penetration	38.7%	51.0%	46.5%	42.7%
2008				
Estimated universe Adults 15+ (000s)	14,857	11,071	23,149	49,077
Net readership penetration	27.4%	42.0%	39.6%	36.5%

Overall some net readership has been lost in the period 2000-2008; however this is clearly not only among heavy Internet users.



The women's weekly category is the one which has changed the most in Great Britain over the period 2000-2008. In particular this period saw the continued development of the weekly celebrity magazines, including the launches of Closer in 2002, New! in 2003 and Star also in 2003. Quite separately, Grazia magazine launched in 2005, targeted at young ABC1 women.

The impact of these developments has been to change the overall profile of readers in this category, so that the overall profile is now skewed towards 15-24s.

This shift in profile is also reflected in the cross-analysis of net readership penetration against Internet adoption. Unusually, the index of penetration among everyday users has risen despite the fact this group is over four times as large as it was in 2000, as shown in Table 6.

Table 6: Net readership of women's weekly magazines by Internet use

		Internet use		All adults
	None	Some	Everyday	Total
2000				
Estimated universe Adults 15+ (000s)	29,374	12,004	5,263	46,641
Net readership penetration	24.9%	21.2%	14.9%	22.8%
2008				
Estimated universe Adults 15+ (000s)	14,857	11,071	23,149	49,077
Net readership penetration	19.9%	23.0%	20.0%	20.6%
Index of net penetration 2008/2000	80	108	134	90

Furthermore, although there is a fall in overall net readership, it should be noted that gross readership has increased by 10% as readers in the market now read 2.6 titles per week, compared to 2.1 in 2000.

The changes in this market over the past decade have been such that it is not possible to apply the Internet adoption curve technique. It is a good example, however, of how a particular magazine market has evolved in that time.

Conclusions

Where readership has been lost in the period 2000-2008 the Internet is likely to have been one of a number of factors, but it is by no means the sole culprit. There are sectors, such as the popular daily newspapers, where the Internet has played no role in any readership loss.

Some of the publications which most appeal to the core group of Internet early adopters have either managed to increase readership, despite competition from the Internet or to offset losses as a result of the Internet. It is possible that the Internet itself has been a tool in these successes and, while a threat to readership, also offers the opportunity to create readers.

Acknowledgement

I would like to thank Kevin Ford for his advice and input in developing the analysis technique described in this paper.