THE EVOLUTION OF NEWSPAPER AND MAGAZINE BRANDS IN THE DIGITAL AGE

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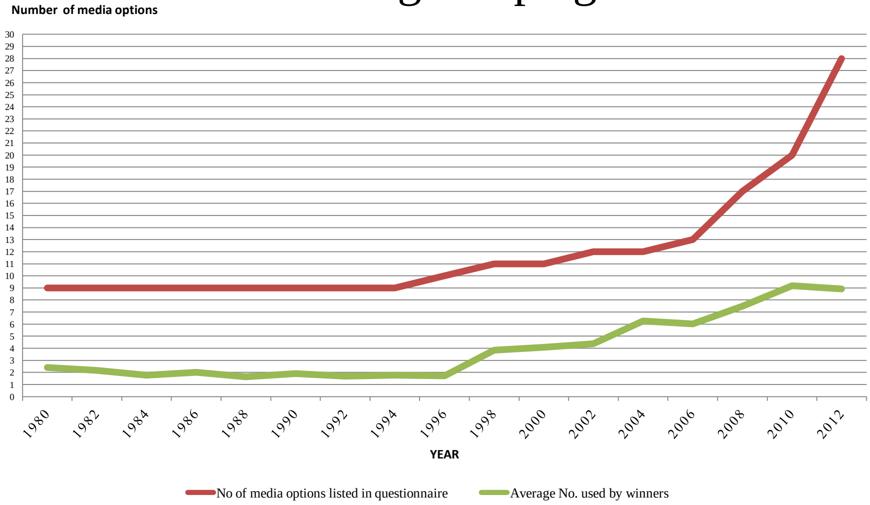
1. Introduction:

The communications industry is evolving at an unprecedented rate. Virtually all media owners are becoming cross platform and often multi-media content suppliers whilst agencies are now truly multi-media in their approach to delivering advertising content.

An analysis of the winning case histories from the IPA Advertising Effectiveness Awards (Chart 1.1) shows that prior to 1996, campaigns comprised an average 1-2 communication channels out of the 9-10 listed media options. This number has grown steadily since 1996, and now stands at between 8-10 media channels being used out of the now 28 listed options of major media channels.

Chart 1.1: More media channels being used in winning campaigns



Source: IPA Databank

In 2004, the IPA – the trade association for UK communication agencies – was asked by its member companies to produce a consumer centric tool which would provide both insight and accountability for this increasingly complex multi-media and multi-platform world. In response to this, the first IPA TouchPoints Survey was produced in 2006; to date four IPA TouchPoints surveys have been published and a fifth will be published in early 2014. The format of the survey has been copied in virtually all the major advertising markets around the world.

TouchPoints consists of two interconnected data bases – the first, the Hub Survey, comprises information from both an e.diary which collects data on respondents' life and media activities on a half hourly basis over the time period of a week and a wide ranging Self Completion Questionnaire. The second, the TouchPoints Channel Planner uses the TP Hub Survey as a base onto which all the UK industry media currencies are integrated to produce a tool for the calculation of multi-media reach and frequency.

Each TouchPoints Survey has collected a wealth of data on press brands and their changing relationship to other communication channels. This paper examines various aspects of the evolution of newspaper and magazine brands in Great Britain since 2006, using the first four TouchPoints Surveys as the basis of the analysis.

2. The evolving position of publications (print and digital platforms) within the total communications marketplace

The amount of time people spent consuming all media continues to grow on a year on year basis. Whilst traditional media are more or less maintaining their average daily hours of use, internet use is surging ahead showing a 241% growth between 2006 and 2012 (Chart 2.1).

Chart 2.1: Average daily commercial media usage 2006 – 2012 (All adults)

	-4%	-1%	+241%	-4%	N/C
2012 (hrs/mins)	**2.32**	**1.14**	**1.39**	**0.34**	**0.16**
2010 (hrs/mins)	**2.36**	**1.14**	**0.49**	**0.33**	**0.15**
2008 (hrs/mins)	**2.41**	**1.07**	**0.29**	**0.35**	**0.14**
2006 (hrs/mins)	**2.38**	**1.15**	**0.29**	**0.35**	**0.16**

Source: TouchPoints 2006, 2008, 2010, 2012 (Adults 15+)
Time spent by users (mean z, any day), commercial channels only.
Internet excluding for email or work.

People are absorbing this overall increase in use by increasingly media multi-tasking within half-hours. In 2012, of all the half hours spent consuming media, 87% involved consuming two or more media. Of course this has been greatly facilitated by the growth in ownership of mobile devices.

Charts 2.2 and 2.3 illustrate the respective size of each medium in 2008 compared with 2012. Looking at the respective size of each medium in terms of their average daily hours of use and their weekly reach we can see the traditional media channels in relative states of decline, particularly printed newspapers and magazines. However, this is being counterbalanced by the growth in online consumption of all media.

Online newspapers have increased from a 13% weekly reach in 2008 to a 16% weekly reach in 2012 accompanied by a growth in time spent reading of 13minutes per day to 19 minutes per day. 2012 recorded a weekly reach of 8% of all adults for online magazine reading with an accompanying average time spent of 13 minutes per day.

We can also see that Social Networking has jumped from a weekly reach of 22% in 2008 and average time spent of 38 minutes per day to a weekly reach of 44% in 2012 with average time spent of 57 minutes per day.

Table 2.2: Media channel weekly reach / average daily hours in 2008

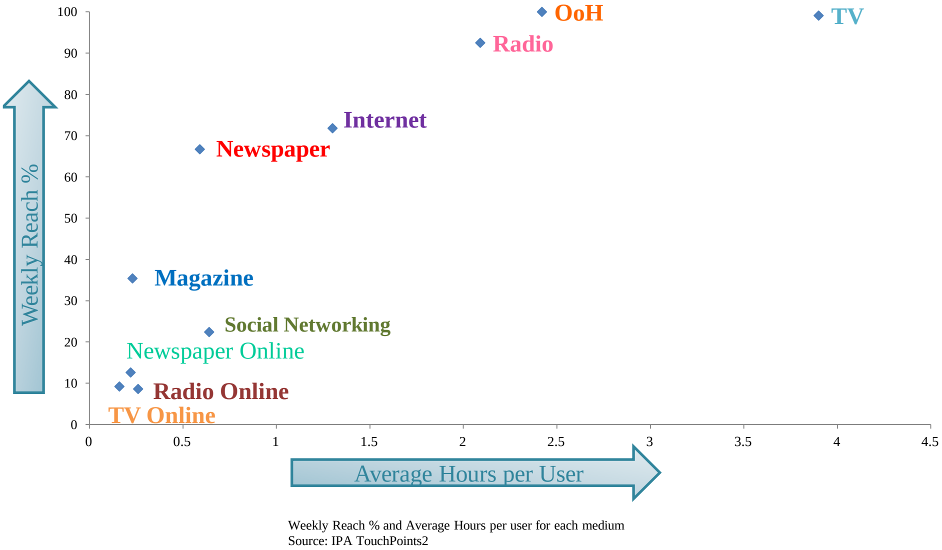
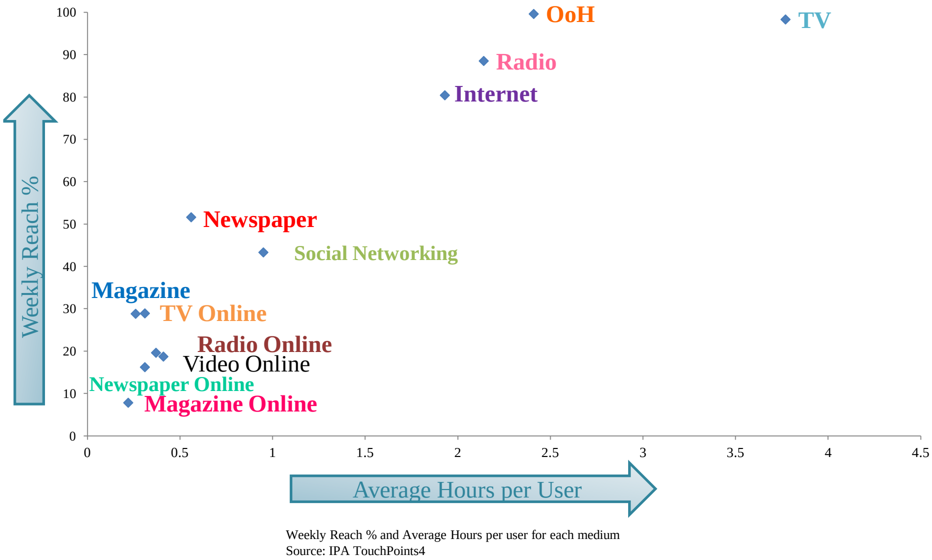


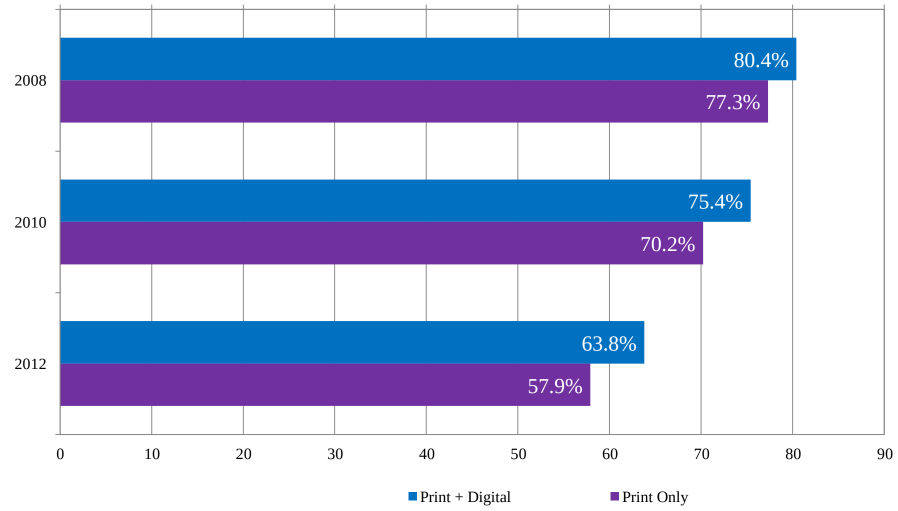
Table 2.2: Media channels weekly reach / average daily hours in 2012



3. The growth and impact of digital platforms - both web based and apps

Whilst the audiences to publications' print platforms continue to dominate, they are in a steady decline. In the four years between 2008 and 2012, the daily reach of printed newspapers fell from 77% to 58% of all adults. In 2008, the online/ web versions of the papers added an extra 3% in reach, taking the total to 80% reach. By 2012 online and app versions were adding back another 6% of reach, restoring overall reach of newspapers to 64% - still down overall but much healthier than the print only figure (Chart 3.1).

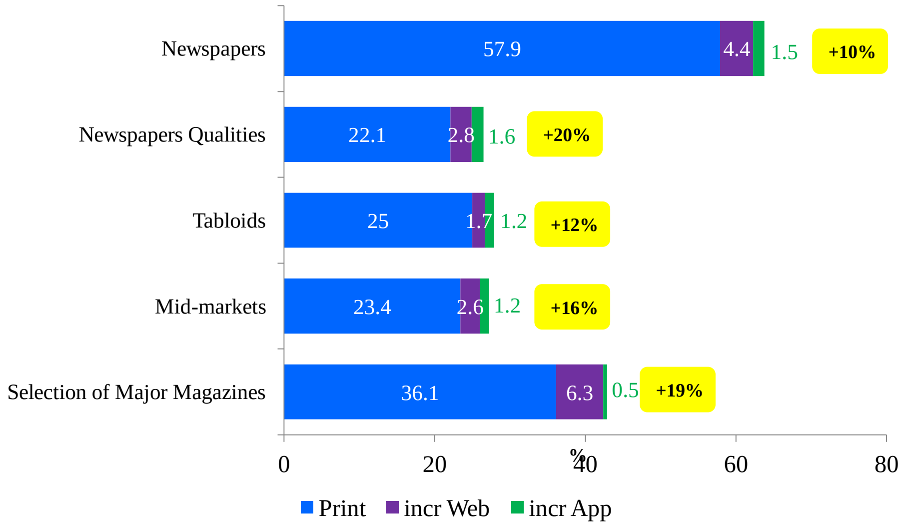
Chart 3.1: Newspaper Readership Trends 2008 – 2012 (All Adults)



Source: IPA TouchPoints2,34

Looking specifically at TouchPoints4 (2012), Chart 3.2 analyses what app and website reading adds to each print sector. For newspapers, the digital gains are greatest for the quality sector where an extra 4.4 percentage points (i.e. +20%) is added to the print platform reach – qualities also gain more from web versions compared to app versions.

Chart 3.2: What web and app readership adds to print by sector



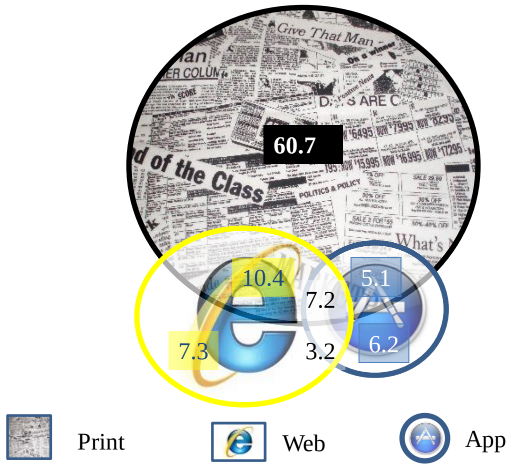
Source: IPA TouchPoints4

Taking a selection of the major UK consumer magazines we can see that the digital formats add a healthy 19% more reach to the print editions - this growth is currently dominated by web editions with only a minor contribution from apps but this could change rapidly with the recent explosion in the launch of app editions and the growth in ownership of tablets.

Chart 3.3 illustrates the overlaps in readership between the print and digital platforms. Looking at all quality newspapers 60.7% of all readers only read the print version, 7.3% read only via the web and 6.2 % read only via app versions – a further 18.7% read via two platforms and 7.2% read via all three platforms which indicates a growing propensity for readers to consume newspapers on different platforms at different times of the day.

Chart 3.3:The combination of print, web and apps

Qualities (All readers)

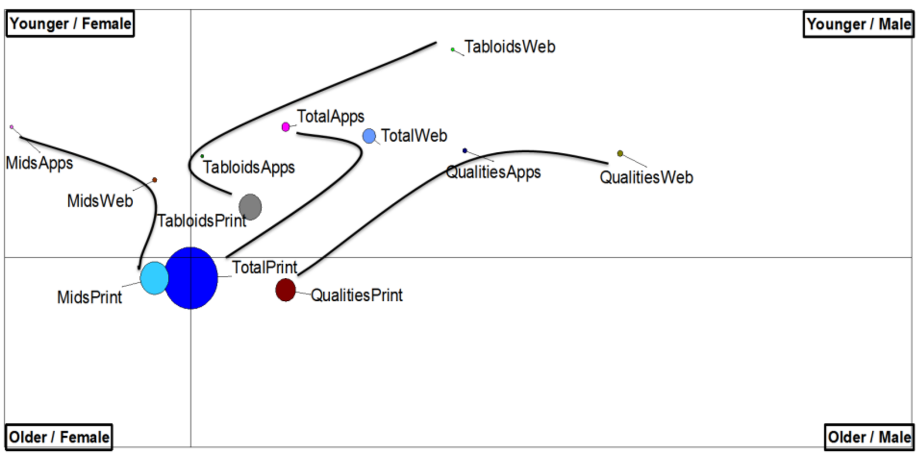


How to read this chart (Qualities): 60.7% of Qualities readers do so on print only
7.2% do so on print AND apps AND web
The percentage of web readers is 10.4% + 7.2% + 3.2% + 7.3% = 28.1%
(note: the sum of the 7 segments on each Venn diagram is 100%)

Source : IPA TouchPoints4

Chart 3.4 compares the demographic profiles of newspaper readers reading via each platform. As would be expected the websites and apps deliver much younger audiences for all the newspaper sectors – for the tabloids and qualities these digital platforms are far more male biased whilst the mid-markets, no doubt driven by the very successful Mail Online website, is far more female biased.

Chart 3.4: Comparative age / sex profiles of newspaper readers by platform



Source: IPA TouchPoints4

4. What digital adds to print reach and frequency

The TouchPoints Channel Planner integrates print readership data from the National Readership Survey (NRS) and website usage data from the UK Online Measurement body (UKOM) onto the TouchPoints Hub; this allows the user to evaluate the contribution made by each of these platforms to a multi-media schedule. In the example shown in Chart 4.1 we can see that it is possible to plan print (insertions) together with site (impacts) to show what the combined properties from a publisher might deliver. In the example we have planned three insertions in the newspaper edition and two insertions in the supplements, both using data from the NRS. Then we have added the newspaper sites for each publisher, using data from UKOM, using impacts as a planning metric. The Channel Planner then calculates the total campaign delivery in terms of reach and frequency, showing in this case that when the digital properties are added to the print-only campaign they add 4.72% exclusive reach to the overall campaign based on a target of ABC1 Men.

Chart 4.1:Using the Channel Planner to show what digital adds to print

Male and Social Grade ... | All Adults (15+)

Newspapers (NRS)

Insertions	Insertions	Readership [000]	Readership %	Reach %	Avg Frequency
Daily Mail	3	1,227	9.50	14.67	1.94
The Times	3	671	5.19	9.02	1.73
The Mail on Sunday	3	1,407	10.90	14.61	2.24
The Sunday Times	3	1,177	9.12	12.72	2.15

Male and Social Grade ... | All Adults (15+)

Newspaper Supplements (NRS)

Insertions	Insertions	Readership [000]	Readership %	Reach %	Avg Frequency
DAILY MAIL ON SATURDAY[illegible]	2	1,177	9.12	10.23	1.78
THE MAIL ON SUNDAY-You[illegible]	2	920	7.13	8.53	1.67
THE MAIL ON SUNDAY-Live[illegible]	2	906	7.02	8.30	1.69
THE SUNDAY TIMES-The Su[illegible]	2	926	7.18	9.09	1.58
THE SUNDAY TIMES-Busine[illegible]	2	840	6.50	8.08	1.61
THE SUNDAY TIMES-Money[illegible]	2	808	6.26	7.74	1.62

Male and Social Grade ... | All Adults (15+)

Sites (UKOM)

Insertions	Total Impacts [000]	Avg. Daily Page Views [000]	Total GRPs	Reach %	Avg Frequency
MailOnline (Media Channel) - Ads	[illegible]	3,772	44.15	6.99	6.31
The Times/The Sunday Times (Media Channel)	[illegible]	241	53.65	[illegible]	[illegible]

	Reach [000]	Re[illegible]	[illegible]	Total Impacts [000]	Avg. Frequency	Exclusive Reach %
Total	5,683	[illegible]	[illegible]	37,226	6.55	-
National Newspapers	4,522	35.03	104.14	13,445	2.97	11.87
News Supplements	3,381	26.19	86.41	11,156	3.30	3.87
Internet	1,097	8.50	97.79	12,625	11.51	4.72
Total Mail channels	3,954	30.62	151.87	19,607	4.96	22.67
Total Times channels	2,756	21.35	136.47	17,619	6.39	13.39

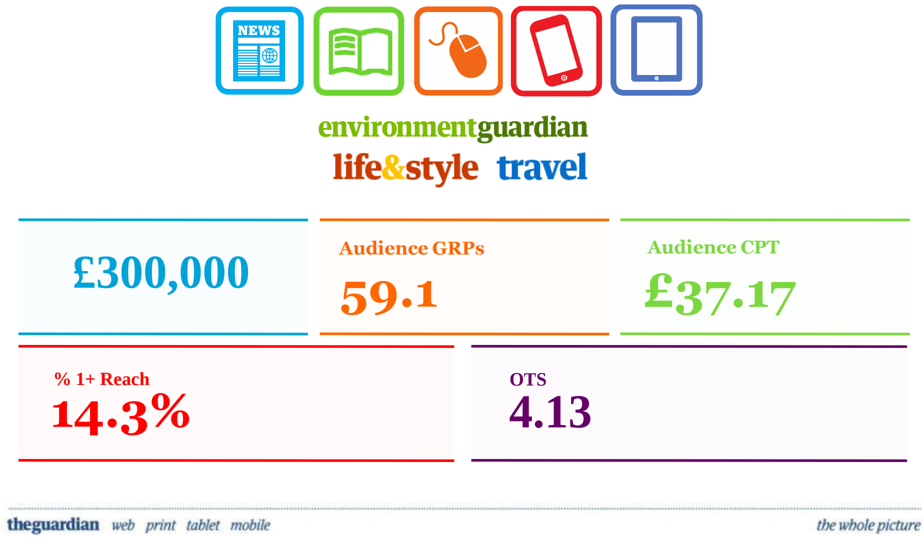
Campaign total combining Newspapers (NRS) with sites (UKOM) and showing what sites add to the campaign
Mail channels deliver higher reach than Times channels on this campaign

Source:IPA TouchPoints4 telmar the FUTURE of Media Planning

Guardian Newspapers – one of the UK leaders in digital platform development – has customised the TouchPoints Channel Planner to produce a cross-platform tool called *Audiences not Platforms*. Using a combination of the standard TP Channel Planner and their own proprietary audience data, they have produced a tool which enables agencies and advertisers to calculate total audience reach for media plans encompassing the current 50 different Guardian media channels.

Using this, the Guardian is able to offer and measure audience packages to advertisers across hundreds of different target markets which enables it to deliver on its digital first strategy by truly leveraging the scale of its cross platform audience to advertisers.

Chart 4.2: Guardian "Audiences not platforms" case study ABC1 women launch

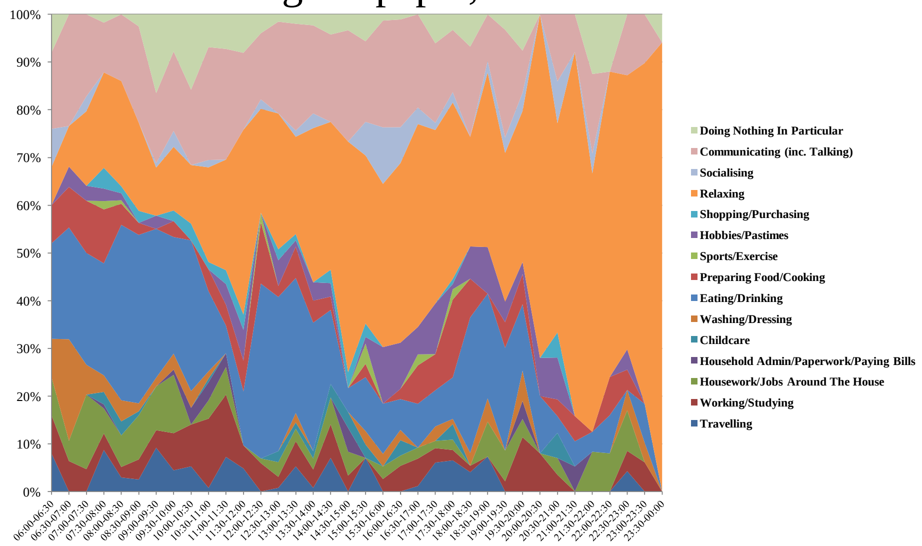


For the first time the Guardian Newspapers are able to show the reach and frequency that can be delivered to an ABC1 Women target using all of their properties - newsprint, web, mobile and tablet.

5. The life context of press consumption

The TouchPoints e.diary allows us to analyse when newspapers are read throughout the day and what life activities readers are also doing in the same half hour. We can compare the general life activities of Guardian readers (quality sector) to readers of the Sun (tabloid sector) (Charts 5.1 and 5.2).

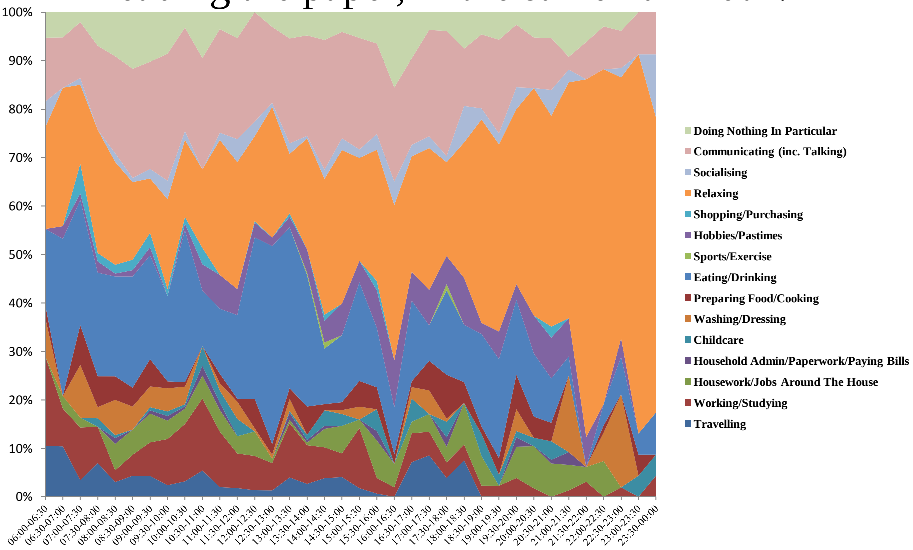
Chart 5.1: What else do Guardian readers do whilst reading the paper, in the same half hour?



Average Weekday
Guardian reader e.Diary

Source:IPA TouchPoints4

Chart 5.2: What else do Sun readers do whilst reading the paper, in the same half hour?



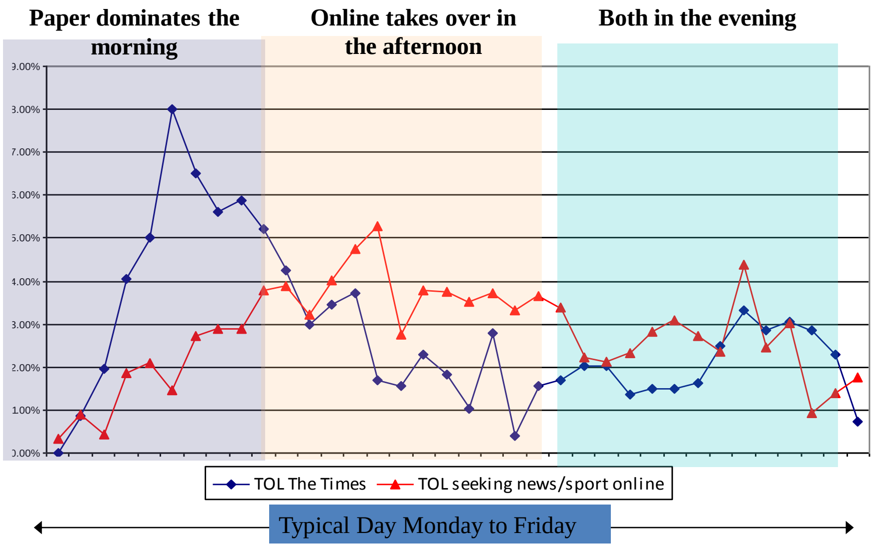
Average Weekday
Sun reader e.Diary

Source:IPA TouchPoints4

Activity patterns are different for the two papers. Whilst for both titles relaxing and eating and drinking are important, the consumption patterns are different. For Guardian readers there is a strong peak of relaxation at around 8pm, while for the Sun readers relaxation peaks much later in the evening. Eating and drinking and reading the Sun is much more consistent through the day and synonymous with a snacking approach to food, whereas our Guardian readers are more fixed to traditional meal times. Working and studying patterns are also quite different for the two papers.

We can also look at how press is consumed across the day on the print and digital platforms. Chart 5.3 compares the print readership of the Times newspaper with Times readers who say they are looking online for news and sports information. This chart demonstrates a morning dominated by newspaper readership with online taking over in the afternoon, becoming the most popular source for news and sport information. Finally in the evening, the paper gains as people perhaps have their first chance to read it, whilst the internet remains constantly strong as people look for the latest news and sports results.

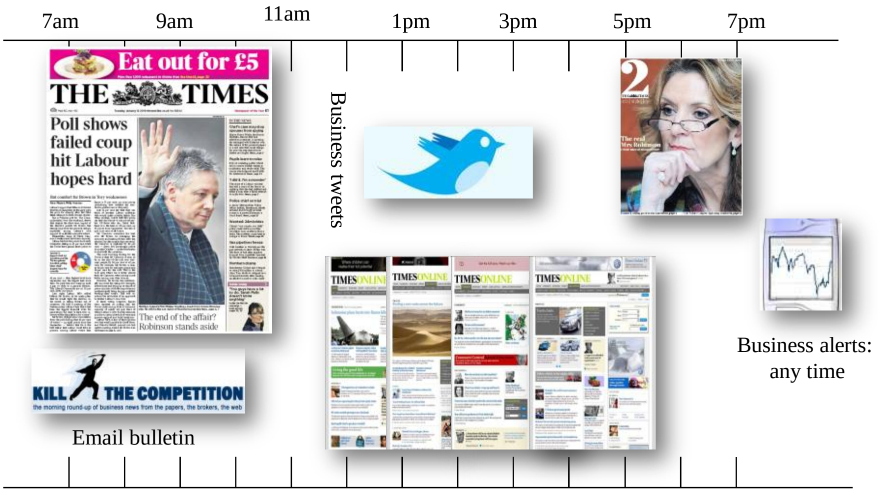
Chart 5.3: Usage changes as the day goes on



Source: IPA TouchPoints2

News UK was able to utilise this data to maximize the use of its various platforms to deliver relevant content to its readers throughout the day as demonstrated in Chart 5.4.

Chart 5.4:Tailored content through the day



Greater depth of contact/engagement

This information from IPA TouchPoints helped create tailored content throughout the day to suit the needs of these media hungry consumers. Source: IPA TouchPoints2

6. The relative effectiveness of print brands in driving WOM/social media

The growth of social media has rejuvenated Word of Mouth (WOM) as a communication channel. Although the major focus of WOM tends to be online, it is important to note that this only accounts for about 6% of all WOM activity – the vast majority is still face-to-face. Most communication plans are now constructed to maximise the relationship between paid-for, owned and earned media of which WOM is a major part. So how effective is print at driving WOM?

Using the Keller Fay definition of Conversation Catalysts, i.e. people with a large social network who regularly give recommendations in multiple product categories, we can compare the number of users of each major medium who fall into this key group of super communicators and their index compared with all adults (Chart 6.1). Although smaller in absolute numbers, online users of each medium index substantially above average for Conversation Catalysts – this is particularly the case for online magazine readers. Traditional media channels attract only average conversions for all users – no doubt due to their high population penetration, however, if we focus on heavy users of traditional media (Chart 6.2) we can see that heavy print readers have a high conversion to Conversation Catalysts – printed magazines readers score an index of 116 compared to all adults, whilst printed newspaper readers score particularly well with an index of 121, which matches heavy social media users and is only beaten by heavy cinema goers who index at 128.

Chart 6.1: Converstation Catalysts' media consumption (reach) indexed on all adults

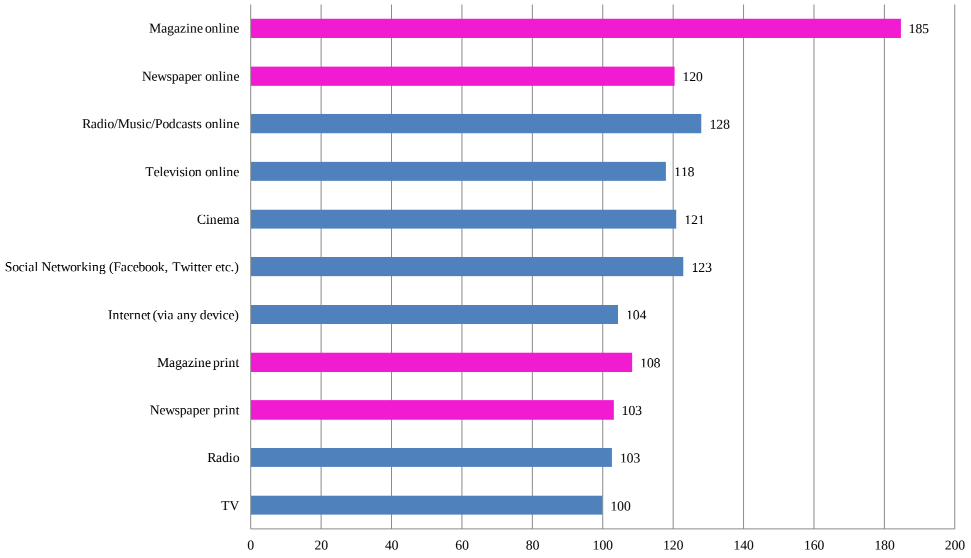
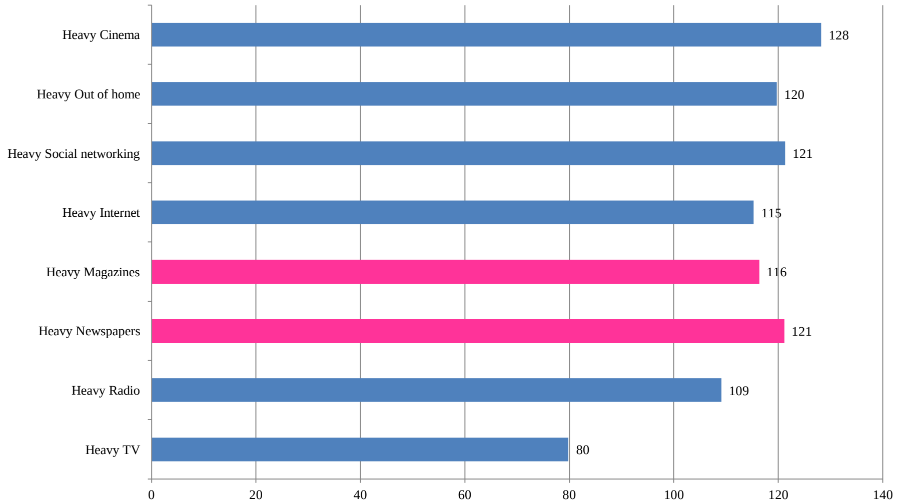


Chart 6.2: Conversation Catalysts' heavy media consumption indexed on all adults



Source:IPA TouchPoints4

7. The mood readers are in when consuming publications relative to other media consumption

In a communication landscape where we are rapidly moving from an interruption to an engagement model, mood is becoming a key consideration in media planning.

Chart 7.1 compares Good mood with Bad mood - taking the highest quintile for both mood types and comparing this to channel media imperatives, we can see that heavy and medium newspaper and magazine users tend to be the happiest people whereas heavy and medium mobile phone users dominate bad mood.

Chart 7.1: Weight of media consumption – by mood, Top indexing statements vs All adults

Good Mood	Bad Mood
Heavy Newspapers/Magazines (172)	Heavy Mobile Phone (164)
Medium Newspapers/Magazines (135)	Medium Mobile Phone (140)
Heavy Commercial Radio (128)	Heavy Commercial TV (121)
Heavy Out of Home (121)	Heavy Commercial Radio (115)
Low Commercial TV (104)	Medium Internet (115)

Source:IPA TouchPoints4

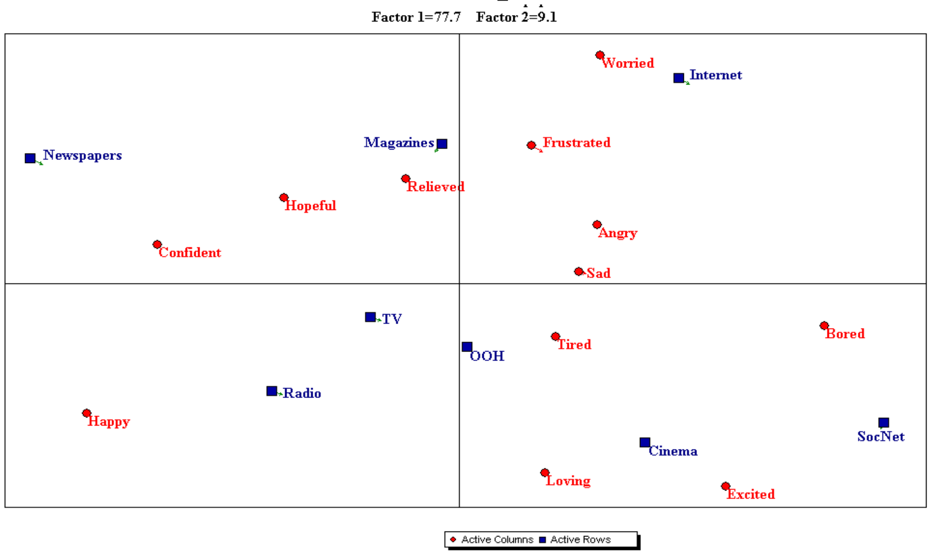
Looking beyond just good mood/bad mood, the TouchPoints e.diary collects data on a range of emotions each half hour. Chart 7.2 plots a correspondence map of emotions experienced whist consuming publications by sector and by platform.

Looking first at newspapers, we can see that printed newspapers are read when people are at their happiest, most hopeful, confident and relieved – although the split by sector shows that whilst this is true for the qualities and mid markets, print tabloid readership falls more into the tired/frustrated sector. The digital platforms for newspapers attract far more mixed emotions – excited, sad, bored etc., this is no doubt driven by the younger profile of the digital consumer as younger people tend to have more turbulent emotions and perhaps also general frustrations of using the internet.

Looking at magazines, the mood surrounding printed magazines leans towards the relieved and tired sectors, whilst the digital copies veer more towards the bored.

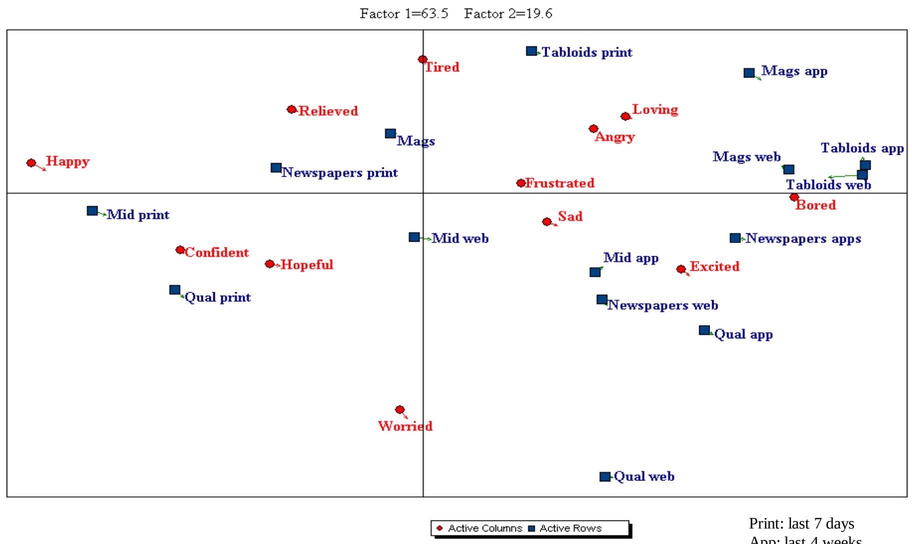
These charts indicate that people are at their happiest when they have actively chosen to undertake an activity i.e. reading a publication rather than consuming media using electronic devices. The results also reflect the online scanning of media to find something of interest when the respondent is feeling bored.

Chart 7.2: Correlation of mood and heavy media consumption



Source: IPA Touchpoints 4

Chart 7.3: Correlation of mood and media by media platform



Source: IPA Touchpoints 4

Print: last 7 days
App: last 4 weeks
Web: at least once a week

8. Summary and Conclusions

The days when press dominated the communications market in the UK are now firmly behind us. Each media channel is reducing in individual salience as the overall communications market expands, resulting in each communication channel having to both prove and then promote its benefits in an increasingly crowded marketplace.

Press is well placed within this dynamic mix. The vast majority of publishers are constantly extending their brands with new, online products which both redress the declining reach of the traditional print products whilst attracting new, younger and more upmarket audiences which are particularly effective at driving WOM.

Press brands can now be delivered in real time across a range of platforms. For consumers they are an active and positive media choice making them an attractive vehicle for advertisers in all their formats.

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