EXPLORING
the role of print and the internet in the 21st century
Introduction: the changing media landscape

The last decade has seen a steady shift in media consumption — a trend that has print and the internet moving in opposite directions. While internet penetration continues to grow, the proportion of people regularly reading titles in print slowly but surely falls. At present, in an average week, more European consumers read a newspaper than use the internet. However, projections suggest that as soon as 2012 this may be reversed.

In fact, this happened three years ago among younger consumers. Today, 87% of those in the 18-34 age bracket use the internet on a weekly basis, compared to 63% reading a newspaper; in comparison, 76% European consumers aged between 45 and 54 read a newspaper at least once a week and 64% use the internet.

Source: EIAA Mediascope 2004-2010, 10-market average. 2012 and 2014 figures estimated on best-fit trend line
Conventional wisdom has it that the internet is replacing print as a medium, but recent studies would suggest that it’s not quite so clear-cut. Instead of consumers either using the internet or reading newspapers or magazines, the EIAA’s Mediascope data show that more than half of European consumers read a newspaper or magazine and also use the internet at least weekly.

What is more, this group of print-reading internet users comprises 76% of all internet users in Europe. In other words, internet users are more likely to read print titles than non-internet users (and vice versa); print-reading internet consumers can be found across all demographic groups.

In many countries, the major newspaper and magazine titles are tailoring their strategies to fit this pattern of media consumption, supporting their print versions with robust online offerings. In Germany, Bild and CHIP are both in the top ten websites by unique users. In the UK, Mail Online attracts 40 million unique users a month. And, across Europe, Sanoma produces some of the most-read print titles and several of the most-visited websites.

The editorial strategies of these and other titles are changing to reflect how consumers use print and the internet, but what are the drivers behind consumer behaviour and what are the implications for brands and advertising?

Microsoft Advertising’s new study, ‘The Role of Print and Online for the Modern Consumer’, provides insight into the roles that these media fill for consumers, and what this means for brands and their strategies for engaging with audiences. It surveyed 1,600 adults in eight European countries, including 1,200 print-reading internet users (PRIUs) in March and April 2010.
Print is a once-a-day medium; the internet is used throughout the day

On average, consumers in Europe spend 12 hours a week using the internet, five hours reading newspapers and just under four hours reading magazines. And, as our research shows, even those who regularly consume both print and the internet spend longer using online media than they do with the printed alternatives.

Consumers who regularly read print and use the internet also consume these media in different ways — as illustrated on page 5. Broadly, at any particular time of day, print-reading internet users (PRIUs) are more likely to be using the internet than reading a magazine or newspaper in print.

But the figures also suggest that consumers generally read a magazine or newspaper on one occasion per day, be that in the morning, afternoon or evening. In contrast, the internet is used on different occasions — and by implication in different contexts — throughout the day.
And this pattern of consumption is confirmed by the consumers themselves:

- **“I use the internet throughout the day”**
  - 60%

- **“I read the newspaper at particular times of the day”**
  - 56%

Base: all print-reading internet users

While the point that print and online media are consumed in different ways is hardly new, these findings illustrate the intrinsic disparities between print and the internet. The latter’s inherent breadth means it is relevant and used throughout the day; print by its nature is more of ‘read once a day’ format. This difference in turn helps to frame our understanding of how and why half of European consumers continue both to use the internet and read magazines and newspapers in print on a regular basis.
The internet answers more needs than other media

We asked our print-reading, internet-using respondents how happy they would be to give up a range of media — essentially which they would least like to lose and which they would give up first. The results were instructive and illustrate the value of the internet in their lives.

Order in which PRIUs would give up media: 1=first, 7=last (average score)

If they really had to, these readers would give up their printed papers and magazines first, before the radio, TV or mobile phones. By some distance, the internet is the medium that they most rely on, with 57% of those who read print titles at least once a week saying that the internet would be the last or penultimate channel that they would give up.

The versatility and ubiquity of the internet — it is available to most consumers and most content can be found on it (e.g. video, music, games, conversation, opinion, news and analysis) — means that it can stand in for other media. And this is illustrated in how it is used throughout the consumer’s day.
Two-thirds of those reading print and using the internet on a weekly basis agree that they can get all the information they need online; more than three-quarters state that the internet gives them a range of information that can’t easily be found elsewhere. In short, while it may not entirely replace printed magazines or newspapers directly, half of all European print readers feel that the internet is a more comprehensive source of information than even the print titles they read.

Base: all print-reading internet users*
Consumers choose favourite websites like they choose print titles

Print is typically thought to have a relatively close relationship with its readers: consumers choose titles based on several factors, which may include the subject matter, style and tone of writing, and titles are written with their readers’ interests and attitudes in mind. Our research suggests that consumers have a few favourite websites with which they have a similar relationship.

Three-quarters of respondents to our study have a favoured website or selection of favourite sites that they regularly visit, and they’re very loyal to them. Of this group of consumers, more than 80% visit these sites every day. They know what to expect from their favourite sites and turn to them for information. In fact, they have a very similar relationship with these sites to that which they have with their favourite print titles.

Behaviour with particular favourite websites

Visit these sites at least once a day: 84%
Each time I go on the internet, I usually start or finish with these sites: 58%
I know exactly what to expect from these sites: 56%
I often turn to these sites for information: 55%

Base: all internet users who have a favourite website or websites *
Among those consumers who use both channels, online is the first port of call for the majority of subject areas. News and analysis of the news are the only subjects for which they are more likely to turn to printed newspapers or magazines than the internet.

Information for which PRIUs would turn to the internet or newspapers/magazines in print

<table>
<thead>
<tr>
<th>Topic</th>
<th>Internet</th>
<th>Print titles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up-to-date news, sport &amp; entertainment stories</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td>Definitive comment &amp; analysis of news</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Getting an opinion I trust on a topic or item</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>Recipe or cookery information</td>
<td>25%</td>
<td>48%</td>
</tr>
<tr>
<td>Weather reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday / travel information</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Money / financial information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health / medical information</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Clothes / fashion</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Where to eat and drink</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Gadgets / tech news and reviews</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Maps / directions</td>
<td>11%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Base: all print-reading internet users*
News consumption is a major driver of online activity

We delved a little deeper into consumers’ behaviour and attitudes to news consumption. Two-thirds of print-reading internet users claim to regularly read breaking news online, and one-third read news-based comment and analysis, in addition to their print-reading habits. In fact, in these areas, they are more likely to read news and analysis online than internet users who do not regularly read magazines or newspapers in print. From this, we can build a picture of PRIUs as infophiles.

For the majority, their consumption of news on the internet is not a replacement for their print reading — fewer than one in three reads newspapers less often because of their online consumption. This suggests that news and information are more easily absorbed by multimedia consumers than by those who only use one channel.

Fewer than one in ten PRIUs feels that news in print is any more reliable than that found on the internet, although this may in part be due to the fact that three-quarters consume news online at the website of a printed newspaper or magazine such as ft.com.

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Online is the most useful channel in the consumer’s path to purchase

Naturally, when considering patterns of media consumption, brands are particularly interested in how this consumption relates to or influences consumers’ purchases. This is particularly relevant given print’s traditional image as an authoritative source of information and the breadth and ubiquity of the internet. As previously mentioned, these consumers are infophiles, regularly using several different media, so it is instructive to see that, across the path to purchase and in all phases of pre-purchase, the internet is the medium of choice.

Base: all print-reading internet users*

Whether consumers are finding out more information about a brand or product, interacting with or comparing brands, or looking for recommendations or reassurance about a specific brand or product, the internet is by far the most useful medium. More than that, its consistent usefulness across this process makes it the richest and most versatile format, allowing consumers to answer all their needs in the build-up to making a purchase. TV comes close in giving consumers their first awareness of specific brands or products, but print formats are notable by their relative anonymity.
Key findings — the role of print is changing

The interplay of print and the internet in consumers’ daily lives is something that has interested marketers and the media industry for some time. As mentioned previously, one school of thought suggests that the internet is replacing print for consumers. While that may be true, at present half of all European consumers consume both print and the internet on a weekly basis. And the strength of print titles in markets across the region suggests that print consumers will remain a significant audience group for some time to come.

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The results of Microsoft Advertising’s study indicate several stand-out points about this important audience:

• These print-reading internet users are infophiles — internet-savvy print connoisseurs who like having access to a wide range of information through a variety of formats. They actively seek out this information — be it news, sports, entertainment, financial or business data, or keeping abreast of developments across a social network — and are comfortable switching between media to do so.

• They rely more on the internet than print, and believe that the internet can answer all their needs. It is their first port of call for information; more than this, the internet affords this group all the breadth and depth they need — functioning as a near-limitless pool of information.

• The way in which consumers are reading print has changed and will continue to do so. Newspapers, magazines and other printed publications have what amounts to a regular appointment with their readership; this is complemented by the use of the internet throughout the day for up-to-date news and comment. And the main value of print titles now lies in their summary and analysis of news and other content. Indeed, many readers of newspapers and magazines in print also visit their titles’ websites for up-to-date stories and snippets.
Brands need to keep pace with changing media consumption

The advantages that print formerly had — the involved relationship with its readers and its ‘trusted advisor’ status — have all been eroded. Consumers now spend less time with print titles than at any time in the past; they have their favourite websites to which they remain loyal, and the breadth of contrasting views and opinions on the internet make it a better impartial advisor than any one print title. While print is still a part of these consumers’ day, it’s a part that they are prepared to give up; in stark contrast to their reliance on the internet.

Print still has a role to play in brands’ advertising strategies, but for all of these reasons it’s a much smaller role than in the past. The internet enables brands to reach consumers at different times and in different contexts throughout the day; the multitude of formats and channels available online simply proves the point that print advertising cannot keep pace with consumers’ changing patterns of media consumption. Ultimately, while the printed page is still a useful medium for static advertising, the internet by its nature enables more dynamic advertising and allows brands much greater involvement and engagement with their consumers.

*Sources: unless otherwise marked, all figures are from Microsoft Advertising’s study The Role of Print and Online for the Modern Consumer, an 8-market study conducted online among 1,600 readers and non-regular readers of print in the UK, Germany, Netherlands, Sweden, Denmark, Norway, Finland and Switzerland. Fieldwork was conducted in April and May 2010. Other data from ElAA Mediascope 2010.
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