

WILL TOMORROW'S ADULTS REJECT PRINT MEDIA ALTOGETHER?

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Introduction

I am 32 years old. I love reading - newspapers, magazines, books. But my reading habits have changed over the last year or so. Until about a year ago, my print media consumption went something like this: I'd buy a newspaper 2 or 3 times during the week and usually on a Sunday. I'd also buy magazines, usually a woman's glossy, a film title and a cookery one, reflecting my interests in life. I read the newspapers on the train on the way to work, my way of catching up with the news and maybe if the train was delayed I'd get to read one or more of the features. Magazines were read for relaxation and to get the latest film reviews or to know what recipe to use when my friends came round to dinner.

But things have changed; I buy a newspaper perhaps once during the week and still on Sundays. I catch up with the news via the electronic version of the newspaper when I get into work. I am comfortable with the Internet so it is natural for me to use it as a source for news and information. I occasionally glance at the film reviews online but I do still buy my magazines. They don't go out of date as quickly as newspapers, and I can pick them up several times before the next one comes out, when I have a few minutes in my busy schedule.

So for me, an adult of today, the traditional print medium is under threat. I am still reading, but the habits and patterns have changed. Now I'm not suggesting that I'm typical of all adults or even of all 32 year olds. But it does pose the question - if adults of today are changing their reading habits, will tomorrow's adults reject print media altogether?

The print medium has been under attack for as long as we can remember – really since the advent of television having to fight for share of mind and time among consumers around the world. In many countries readership is on the decline.

But as this century comes to a close the print medium is facing fresh threats from the rise and growth of the Internet. Newspapers and magazines have responded by transferring their product into online form, some with more success than others. But can this expand traditional print audiences or be the death of the print medium? Will people actually convert to 'reading' online?

So how big is the electronic threat? What will be the situation in the year 2020 when I am 53 and the 11 year olds of today are 32?

This paper will firstly assess the extent of the threat and its effect to date. Secondly we will make some observations on the rise and potential of online reading, and the need for adequate measurement. Finally we will stop looking at the Internet as a threat and begin to view it positively through its potential as a research tool.

1. A medium Under Threat

So what is the extent of the threat? Are we really in danger of seeing the traditional print medium die out completely? It is undoubtedly a medium which has seen decline over the years. In 1957, national daily newspapers in the UK had a combined circulation of 16m copies. By the middle of 1999 that figure had fallen to 13.7m. And for readership the decline is far greater. The cumulative readership for national dailies in 1957 was 51.96m and by the end of 1998 this had fallen to just 34m. If we look at Sunday newspapers circulations were at 26.9m – by the middle of 1999 they had dropped to 14.6m. Total readership stood at 81.9m in 1957 but this had almost halved by the end of 1998 at 43m.

That is newspapers; what about magazines? Are they suffering as badly? Total circulation of women's magazines in the UK has declined during the 90's but the men's magazine market has flourished. What appears to be happening is that certain sectors within the broad categories are succeeding at the expense of others. And this decline is being seen in other countries around the world. One of the other papers at the conference, being delivered by my colleague Kate Lynch from the USA is entitled 'The Case of the Disappearing Readers'.

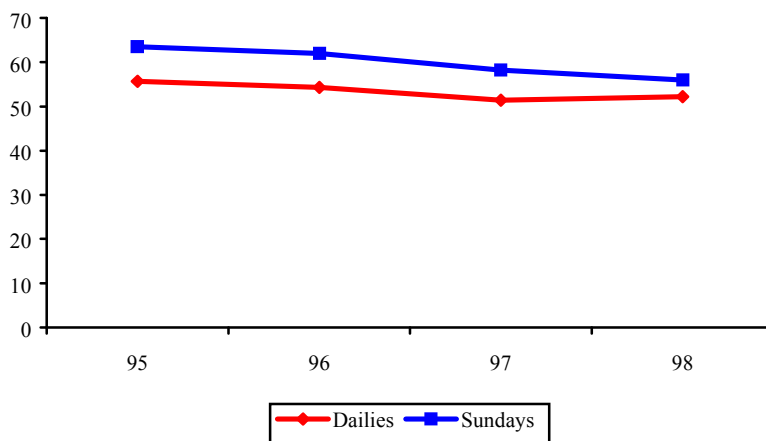
Converting new readers

So is the decline inexorable? As young people are using the Internet in greater numbers, will they just not read newspapers and magazines? This brings us to a key question - how good are the print media at attracting in new young readers to their publications? If they are not succeeding in doing that now, then they will be in serious trouble long before the year 2020 and we will indeed see the death of the print medium as we know it as well as its old readers dying off!

Let's look at newspapers first. They are considered by many to be the sector most likely to suffer as a result of the rise and growth of the Internet. According to a report conducted by the London School of Economics entitled 'Young People, New Media' reading of newspapers almost doubles after the age of 14, with 56% of 15-17 year olds reading one on average for just under half an hour on 4-5 days a week. This indicates unsurprisingly that newspaper readership is a rites-of-passage issue - it is actually not something you do until you get older. But while that means that we shouldn't be concerned about the low levels of newspaper readership amongst children, we do need to seriously consider the take-up among 15-24 year olds.

If we look at the UK, it would seem that newspapers are indeed in trouble. From 1995-1998 the % of 15-24's reading a national daily newspaper declined by x%. The decline is even greater for the Sunday newspaper market.

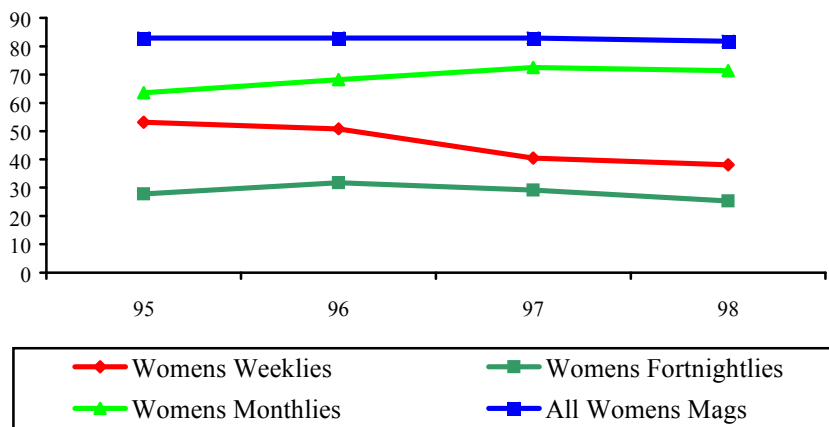
% Of 15-24 Year's Reading National Daily & Sunday Newspaper



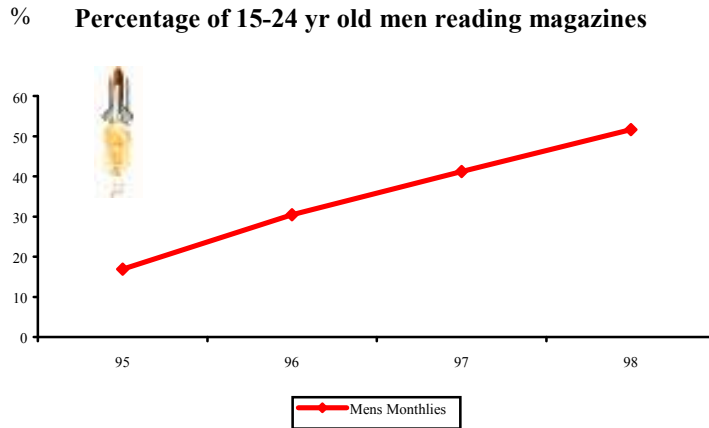
Source: NRS

And is the decline the same for magazines? The chart below shows readership of women's magazines amongst women 15-24. The top line is the figure for all women and it has remained constant over the last few years, which suggests that magazines are withstanding the threat better than newspapers at least in the UK. There have been changes by sector with monthlies replacing weeklies as the choice for young women.

Percentage of 15-24 yr old women reading magazines



In contrast to the steadiness of the women’s magazine marketplace the men’s sector has shown explosive growth over the last few years, although this has slowed down in 1999.

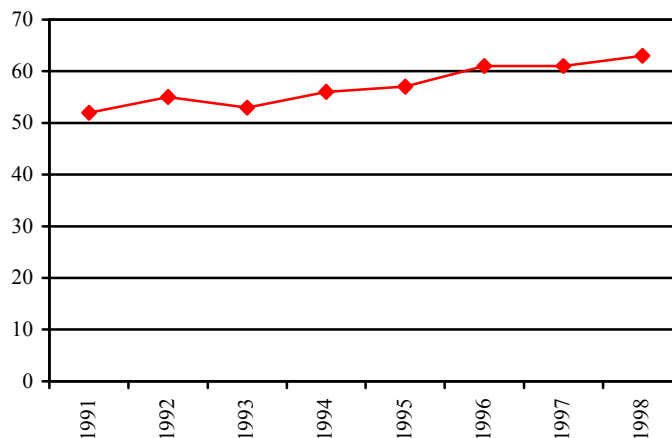


Source: NRS

So young people are still reading - but are choosing magazines rather than newspapers. This is backed up by some research from the UK from the Quality of Reading Survey (a joint advertiser, agency and magazine publisher study). This shows that 15-24 year olds spend almost 1/3 less time reading newspapers than all adults. So as well as less of them reading newspapers those that do are also spending less time with the paper. For magazines the picture is very different - the same study shows that 15-24 year old women spend on average 49% more time reading women’s monthlies than they do reading a national newspaper. And 15-24 year old men spend 58% more time reading men’s lifestyle magazines.

It is hard to determine cause and effect in this situation as there are many factors which play a part. Can we attribute the decline in newspaper readership to the rise of the Internet? It has certainly seen explosive growth over the last few years, but I believe there are bigger issues which are driving the changes in the print medium. Life at the end of the 20th Century is very busy. In the UK for instance we have apparently the longest working week in Europe. The rise in the number of women working means a reduction in their free time. People are increasingly conscious of ‘time famine’ and ‘time juggling’. This chart from the Henley Centre in the UK shows agreement with the statement ‘I never have enough time to get things done’ and it has risen to over 60% in 1998.

% of adults agreeing ‘I never have enough time to get things done’



Source: Henley Centre Planning for Social Change

Our belief is that against this backdrop of time pressures, young people who have grown up with screen-based media are getting their news from sources other than newspapers. **Newspapers** are at risk from not converting today’s young people into future readers. ‘Facts’ and news are easily available on the internet and other media such as expansion in TV.

Magazines seem largely unaffected at the present time. This could be as a result of the fact that young people are still prepared to spend longer reading them. There is a strong personal and emotional attachment particularly amongst females e.g. 'Its a magazine for me'. The lifestyle nature and a strong feeling of trust and identity amongst readers must play a part. Does the Internet really encroach on those personal spots in the day like a magazine?

Magazines can be picked up and put down easily and read over a number of days and weeks whereas the news in a newspaper is often out of date by the time we read it. Going back to the UK QRS study, this table shows the average number of 'pick ups' amongst 15-24 year olds:

Publication type	Number of Pick-ups
Top 5 Men's Mags	5.9
Top 5 Women's Magazines	5.1
National newspapers	2.7

Source: QRS

Is the situation the same in other countries? In Hong Kong the % of 15-24's reading a national daily newspaper has remained relatively constant over the last couple of years and is actually very high - 81.8% in 1998. In Germany there has been a decline of 8.8% from 1996 to 1999 for 14-24's reading a national daily newspaper., but the figures for Sunday have remained constant. The move from reading weeklies to monthlies amongst young women which we saw from the UK figures is also in evidence in Germany.

In the US readership of national press is low to start with as there is much more emphasis on regional and local press and on magazines. According to data from Mediamark Research Inc 2.8% of 18-24's read a national daily newspaper in 1998 down slightly from 3.1% in 1995. Readership of weekend newspapers is significantly higher and has shown an increase from 15.0% in 1995 to 17.7% in 1998.

So while it is difficult to draw global conclusions, there are some pointers which can help to assess the future potential of the print medium. In countries where the national press is succeeding in drawing in young readers there is hope for its future. In areas where life is increasingly busy with little free time, people are going to access facts and news where they can get it quickly and that will probably not be from a traditional newspaper. People will still want to read a physical product - probably for relaxation, so magazines will survive and in some cases thrive as they reflect the lifestyle of their readers.

On-line Reading

Faced with the threat to the traditional print medium, newspapers and magazines have responded by transferring their products online, some using as a defence measure, others seeing the potential for expanding their audience. This brings us back to the question of whether people will actually convert to reading online. Undoubtedly there are readers of the print versions reading the on-line versions, but:

- What proportion are existing print version readers?
- How often do they use on-line rather than print?
- How can we distinguish between the two?

In the UK, the Guardian for example recorded 9.7 million page impressions for June 1999 and it's circulation fell year on year by just under 1%, but what proportion if any could be attributed to on-line reading? In the US, the New York Times and USA Today both get over 2.5 million unique visitors a month, visiting the sites for 25 and 25 minutes on 3 separate occasions. The Wall Street Journal gets just under a million visitors for an average of 20 minutes twice a month. And in Germany the Frankfurter Allgemeine Zeitung, Die Welt and the Sueddeutsche Zeitung achieve 2.5m page impressions between them (Aug'99).

But as we said, there is no knowledge about the crossover in readership, certainly in the countries I have mentioned. So do readership surveys need to change their questionnaire structure to facilitate both alternatives?

In the UK, it has been noted by NRS that some respondents when asked about their readership of newspapers have queried whether the interviewer means the printed or the online version. There are currently no plans to include measurement of online reading on the NRS but there are plans to include a distinction between printed and online when the respondents are asked about whether they've read a publication.

Until we have access to that sort of information, we will not be able to adequately assess the extent of the threat to traditional print media.





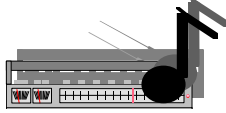
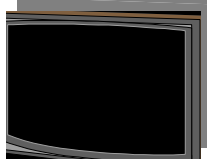

2. How Do The Adults Of Tomorrow View Print Media?

But what about the adults of tomorrow who are the first real generation to grow up entirely in an electronic age. Will the current figures of newspaper readership doubling after the age of 14 continue into the 21st Century? Newspapers are not designed with children in mind although some of them do include small kids' sections. So it is not to be expected that kids read them. But these are young people who are completely comfortable with technology and in many developed countries around the world, home PC and internet penetration is on the rise. Does this mean that they will be so used to screen-based information that newspapers at least will die out?

For most of the examples in the next section the Internet was actually used to conduct the research and this will be explained and assessed in more detail in the final section.

If we assess the value that kids place on different media the outlook is bleak for the printed medium. Kids in the US and the UK were asked: If you could keep just one activity, which would it be?

If you have to keep one activity, which would it be?

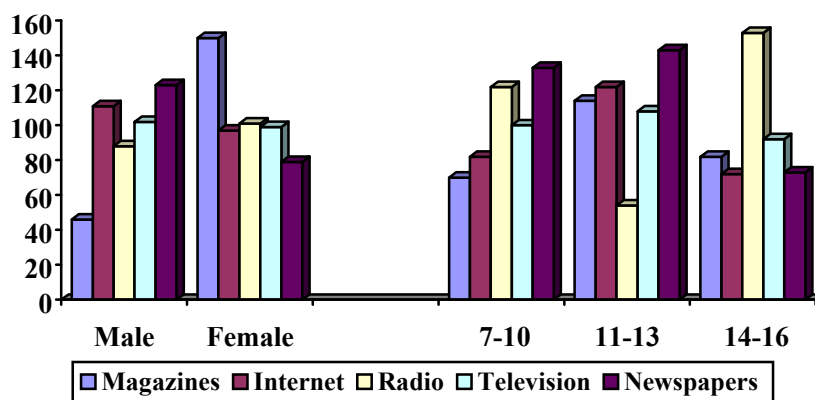
		
	8%	4%
	18%	26%
	12%	30%
	59%	37%
	3%	2%

Source: Starcom

According to this table newspapers and magazines are the lowest of the low. However it is interesting to note that in the US where Internet penetration and usage is ahead of the UK, the medium that suffers is TV. Kids appear to be exchanging one form of screen-based media for another. When asked to explain their choice one child said they would keep the Internet 'Because I can watch TV on the Internet' So perhaps there is hope for newspapers after all.

Using the UK as an example, we can look at the answers to this question, broken down by age. Girls were more in favour of keeping magazines (index 150 against all kids) and radio (index 153 against all kids) and were less interested in newspapers and the Internet. Boys were more likely to keep the Internet (index 122) and newspapers (index 143). Newspapers are more likely to be kept amongst 14-16 year olds (index 133) and 7-10 year olds (index 123), probably due to kids sections.

If you have to keep one activity, which would it be?



Source: Starcom

When asked the question in reverse i.e. If you had to give up one activity what would it be? Over half of UK and US kids said that they would give up newspapers and 13% and 16% chose magazines, just slightly ahead of the other media. Some of the reasons kids give for giving up newspapers support the belief that they are an adult medium –

“Most stories are only understood by adults”

“The majority of articles in a newspaper are not aimed at a child audience”

“It’s just my mum and dad who read newspapers, not me”

One way to predict what tomorrow’s adults will do when it comes to newspapers and magazines is to look at what they are using the Internet for. If it is for reading then, again the future for the print media is not rosy.

Going back to the question about keeping the Internet, another popular explanation for their choice was for chatting to other people. This is confirmed by research conducted by BMRB in the UK - Youth TGI. Of all 11-19 year olds with access to the Internet, 60% said that they used it for sending or receiving emails or meeting people online. In Australia research via Kidscope revealed that Net Kids use the Web most for chatting and least for reading mags. Perhaps part of the reason is that in today’s world it is in some countries more dangerous for children to go out so more of their social activities take place inside the home. The Internet then becomes a social outlet for them, replacing outside activities. This isn’t necessarily on their own. A lot of them are with friends when they’re on the Internet - it is becoming a replacement social glue.

The Technology Generation

	School	Home	Friends
	%	%	%
Use the Internet	47.0	16.2	12.8
Use CD-Roms	47.9	46.9	17.1
Use e-mail	29.1	15.4	5.1
Play PC Games	25.6	53.0	27.4
Use Internet chatrooms	17.9	9.4	12.0

Source: Starcom

3. The Internet As a Research Medium

The fact that kids are using the Internet more for chatting and generally communicating leads on to the third and final section of the paper. A lot of the results in the section above came from research that was conducted online by Starcom. This research was started in the UK about 3 years ago and has been transferred to several countries around the world.

This final section of the paper will focus in on the methodology of researching online and assess its effectiveness and potential as a research vehicle. As penetration of the Internet increases, researching people online is going to become much more the norm and more widely-used. So if we get to grips with how to use it effectively, wisely and safely now, then we will be ready for the future. We will make a few observations on areas of concern such response rates, respondent receptivity and how we can safeguard them. This last is a particular concern when it comes to researching children.

In our experience we have found that response rates are not a problem - the very fact that kids love to communicate online means that they are much more likely to respond to online research.

Many of the traditional techniques used in media research can easily be transferred on to the Internet - questionnaires, focus groups, depth-interviews can all be conducted online. And often it can be cheaper than traditional methods. As Starcom's experience has been predominantly in the area of online questionnaires we will focus on that.

How does it work? Quite simply all you have to do is construct a website and put a questionnaire on it. And normal questionnaire design rules apply. As it is self-completion, we have found that it is important to make it varied and interesting to fill in. However as has been mentioned kids love going online, so it's actually not too difficult to get them to respond. Questions can be the simple yes/no type, multiple choice, or open-ended although these are of course much more difficult to analyse. Respondents are contacted and asked to complete the questionnaire, they email it back and the results are downloaded and imported into an analysis package. So the costs are restricted to website and questionnaire design, data analysis and respondent incentives.

What about safeguards? Many people have concern when it comes to the Internet generally - eg there is still a high proportion of people who are reluctant to give their credit card details online.

In all research kids obviously have to be treated differently to adults when it comes to research. The principles we have of protecting respondents and safeguarding their privacy need to be applied even more stringently when it comes to children. The MRS are currently reviewing their guidelines and code of conduct when it comes to interviewing children. Researching via the Internet is a relatively new method and actually up until now has not been included in the guidelines. Our experience over the last 3 years meant that we were able to substantially contribute to the content and extent of what they should be. There are 5 key areas to take into account when interviewing kids and we have used those as our guide as to how we should conduct research via the Internet.

The first issue is the need to obtain consent of a parent or responsible adult. In our case the responsible adult is the teacher into whose care the children are given, as almost all our online research among children is conducted via schools. This makes it easier to reach greater numbers of children more cost-effectively and also means the research is conducted with an adult present. In our research we always make sure the teachers see the questionnaire in advance and are completely free to query anything. That leads on to subject matter - in general, care has to be taken when researching sensitive issues such race, politics, or sexual activities, and in fact may have to be avoided completely amongst younger children. We are aware that advertising and children is an issue we must treat carefully. Our aim is to act responsibly at all times and we keep branded questions to a minimum, mainly using the questionnaire to find out about children in general. The questionnaire is kept to a certain length and never takes longer than about 8 mins to complete, thereby not overburdening the schools. Incentives according to the MRS guidelines have to be 'safe, legal and acceptable to responsible adults'. In our case the school gets computer vouchers which can be used to buy educational software for the school, so there is a definite benefit.

On-line research needs to be subjected to the same controls as any research. However the Internet by virtue of its connectivity and speed and ease of access to the consumer means that it is already being widely used as a research vehicle and the potential is there for even more widespread use. We have really just scratched the surface in this paper.

Conclusions

To conclude then it is certain that the print medium is under threat, but I do not believe that there is the need for widespread panic. It has been competing for a share of people's time and attention ever since the advent of radio and television. There is evidence in some countries that new young readers are not being attracted into the medium. But 15-24 year olds are notoriously fickle and in many countries they are also light television viewers. However it is an issue that will need to be addressed and those sections of the print media which succeed in drawing in young readers have a better chance of survival..

Print is not the only medium that could suffer as a result of the rise and growth of the Internet. The online research conducted amongst kids by Starcom does demonstrate that consumers may simply be exchanging one screen-based medium for another - i.e. television for the Internet. This does however mean that it is increasingly viable as a research vehicle as the Internet goes more mainstream.

So will tomorrow's adults reject print media altogether? The answer is 'not entirely'. They are currently using the Internet predominantly for communicating and in a social context. However the time pressures faced will mean that certain elements of the print media will have to rethink and redesign their product - mainly newspapers as people will either have their news delivered to them or will read bite-sized chunks on their handheld PC that they carry everywhere. I believe magazines will be better able to face up to the threat of the Internet. There will still be a place for more relaxing reading as people grab a few minutes here and there from their busy schedules to read snippets from magazines.