



REINVENTING DIGITAL EDITIONS

PART II: READER INSIGHTS

RESEARCH REPORT, NOVEMBER 2018

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"We believe in the power of editions. Our readers love the curated order, finite experience and editorial choice. In times of limitless information and limited time, editions provide the valuable service of selection and judgement."

Alan Hunter, Head of Digital at The Times & The Sunday Times

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EXECUTIVE SUMMARY

In the second phase of our multi-year research project on successful digital news products, we examine the motivation and habits of nearly 4,000 readers of digital news in six European countries and the United States. From surveys and interviews with participants in Belgium, France, Germany, Spain, Switzerland, the UK, and the US, we find general news habits and attitudes towards paying.

General findings on news habits and payment attitudes

Three key findings stand out from our analysis of general news habits and attitudes to paying:

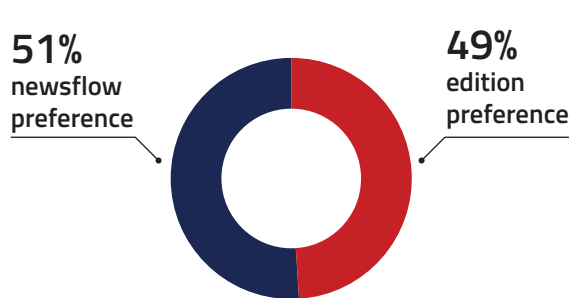
- Abundance of free online news stops readers from subscribing.
- TV is still main medium for news consumption, except for younger audiences where social media prevails.
- Daily briefers are the largest reader group.

Format preferences and insights into edition readers

In this report we closely examine reader preference for two news formats: newsflow and editions.

- Half of all readers prefer to read digital news in an edition format.
- This finding holds true across all the countries we examined — with Germany standing out.
- Contrary to popular belief, the even split holds true for younger readers.

Global preference for news formats



Preference for news formats within age groups

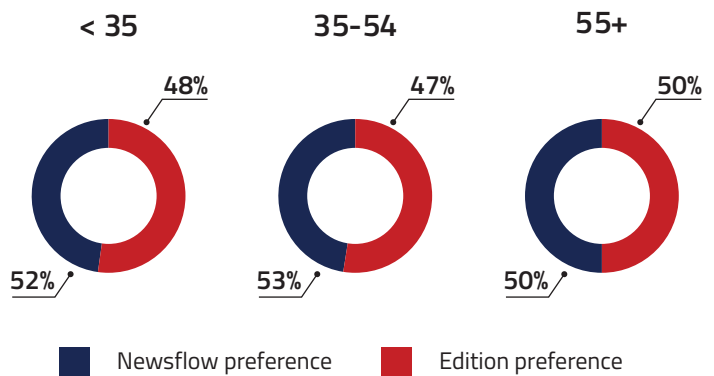


Figure 1. Which format do you prefer to read news in?

Editions correspond to fundamentally different reader behaviors and needs. Edition readers are typically busier people who want to take time once a day to go through a package of news. They appreciate editorial selection and finishability. Edition readers look less for free content and are more loyal to one news brand. Newsflow readers check the news more frequently, read in shorter sessions, and access more sources of news.

For this new segmentation view, we have been able to develop a persona for edition readers versus newsflow readers.

WHAT DISTINGUISHES EDITION READERS FROM NEWSFLOW READERS?

NEWSFLOW READERS

EDITION READERS



Prefer to read news in a constantly updating stream

Prefer to read bundled packages of content, with a clear beginning and end

FREQUENCY

More likely to check the news 10+ times a day



More likely to check the news once a day

DURATION

5-10 minutes each session



10-30 minutes each session

TIME OF DAY

Consume news throughout entire day



Consume news at specific points of the day, mainly in the morning

LIFESTYLE

Regularly check back for latest news



Busy, want to be briefed on overall news

ATTITUDE TO PAYING

Feel they can already find enough content for free, more price sensitive



Less likely to seek out free news sources

LOYALTY

More likely to read multiple news sources



More likely to be loyal to one news brand

IMPORTANT ATTRIBUTE FOR NEWS

Latest breaking news



Finishability, editorial selection, and opinions/analysis

INTRODUCTION

This is the second instalment in our research into digital editions, the online versions of newspapers. Previously we have examined the rising trend of digital-only editions, digital newspapers with no print counterpart, in [Reinventing Digital Editions: Best Practices from Leading European Publishers](#).

In the previous report, we looked at how such digital-only editions came to exist, and what strategies have been successful in their development and promotion. One aspect we wanted to further explore was the readers themselves. When discussing our research, we were often asked who are the readers of these digital-only editions, and why do they want to consume news in this format? In order to answer this, we studied news readers, to understand their motivations and preferences both in consuming digital news as well as paying for digital news—an issue that has plagued the news media industry for many years.

In this report you will learn from the nearly **4,000** readers we surveyed in 7 countries: the United States, France, Germany, Spain, the United Kingdom, Switzerland, and Belgium.

In the first section, you will see how readers consume news (how often, for how long, how many sources, in which formats, and when), their attitude on paying for news (why they have or have not paid, and whether they would be willing to pay in the future), and news preferences (their interest in news, why they consume news, and which attributes are the most important). In the next section, we focus on reader preferences for two news formats: editions and newsflows. In the final section, profiles for the studied countries are given.

From interviews with **30 readers**, we have been able to delve deeper into some of the typical reader personas we have identified. You will see strong opinions on paying or not paying for digital news, clarifications on the motivations for choosing a news source, and how readers have made news part of their daily routines.



CAMILA

NEWSFLOW READER

🕒 age: 36

📍 Belgium



In past week, consumed news via websites, radio, TV, and newsletters



Has not paid for online news in past year, unlikely to in the future

“

I receive by email the headlines and info “flash”. Depending on the titles, I open the mail or not. At noon, I consult one site or the other while eating. I do not read a lot of content, just a few articles and most often to pass the time.

”

WHY EDITIONS MATTER

Definition of edition: *bundle of finite content, published with a certain frequency, and belonging to a series*

At Twipe, our passion for digital editions dates back to 2011, when we developed the first iPad newspaper edition in Belgium. We believe editions are the best format to satisfy the needs of many readers, allowing for the valuable editorial selection that newspapers have fine-tuned over hundreds of years as well as preserving the hierarchy found in print newspapers. Furthermore, editions provide the satisfaction of completion, letting readers know that they are up to date on the news and do not need to check back every few minutes.

In the years since our first foray in to digital editions, we have led numerous research projects on digital editions and how to optimize them for reader behaviour. In our multi-year Digital Reader Engagement project, we teamed with academia (KU Leuven) and industry partners (Mediahuis) to study how readers engage with digital publications. In one phase we attached a variety of sensors to readers and studied them as they actually read different digital editions.

From this we developed EngageReaders, the Google DNI-funded analytics tool for digital editions, in order to allow newspapers to truly measure engagement and not simply pageviews.

We are data driven at Twipe, so we wanted to empirically test our belief in the power of editions. This is why we chose to examine reader behavior in this report through the lens of digital news format preference. Additionally, as the topic of funding for news is a large issue facing the industry, we also wanted to explore what motivates these groups of readers to pay, or not pay, for digital news and if there is a missed opportunity to convert new subscribers.

Elements specific to editions such as editorial selection, hierarchy, satisfaction of completion, and habit formation have been perfected by the industry for more than 400 years. These elements have been appreciated by readers for just as long and so they should be reflected in the formats in which news is brought to people digitally. That is why through research and collaboration with publishers, we work on finding the best ways to translate these elements into a new edition format — to truly reinvent digital editions.

READER PERSONA



SHARON

EDITION READER

🕒 age: 58

📍 United Kingdom

📱 In past week, consumed news via website, print newspaper, social media, radio, & TV

💰 Doesn't pay for online news & is unlikely to in the future

“

It is easier to absorb if it's taken as one 'hit' of news, rather than dribs & drabs....unless it's breaking news about something important. I find the constant barrage of exactly the same information counterproductive. Once I've heard it, that's it, I want to get on with what I'm doing. Then, a few times a day, I will tune in to a news report, or skim the internet to see if there is anything new.

”

NEWS HABITS

The following conclusions in this report come from our base of **3,926 respondents** to a ten-question survey. The surveys were diffused on social media during a three week period in August and September 2018.

We also partnered with a select number of publishers to promote the survey: Mindener Tageblatt (Germany), Le Quotidien Jurassien (Switzerland), Grupo La Información-Diario de Navarra (Spain), L’Avenir (Belgium), and Ouest-France (France). Thank you to these publishers for their collaboration and the insights we have gained from their readers.

Through our survey we were able to confirm some of our underlying beliefs about digital news reader behaviour and reconfirm some existing industry research, but there were also a few surprises.

In this chapter we examine the data question by question. The next chapter focuses on the reader data through a new segmentation lens: preference for newsflow format versus preference for the edition format.

The data shown here is for our global base of respondents, for a look by country please refer to the country profiles starting on page 20.

TV IS STILL MAIN MEDIUM FOR NEWS CONSUMPTION, EXCEPT FOR YOUNGER AUDIENCES WHERE SOCIAL MEDIA PREVAILS

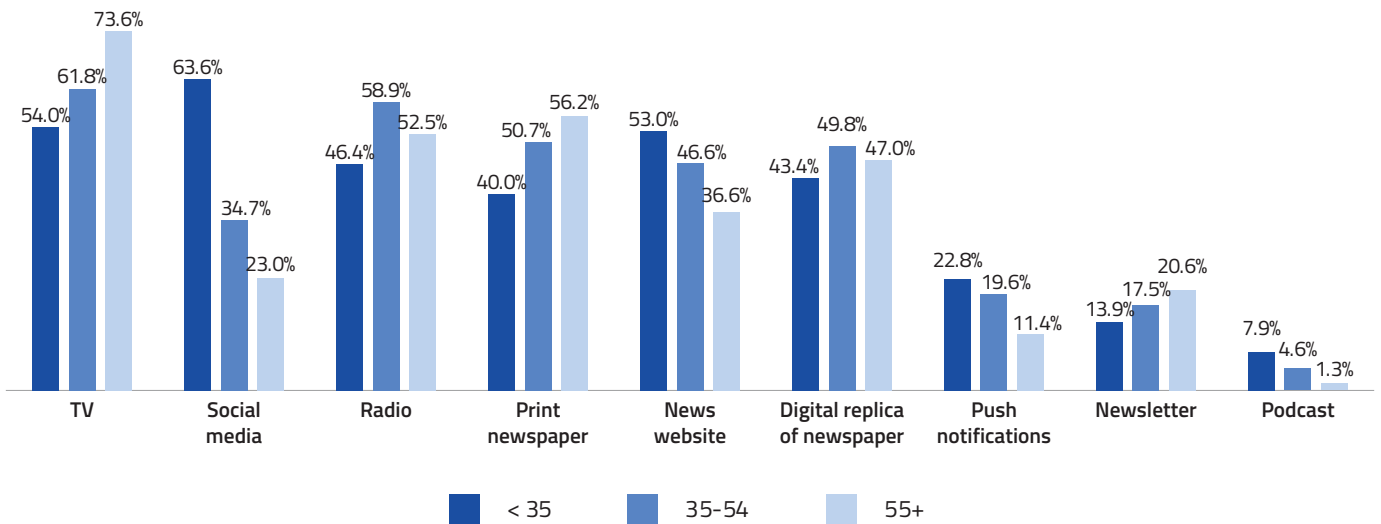


Figure 2. In the past week, how have you consumed news?

We split our respondents into three age groups: **under 35, 35-55, and 55+**. How each group most commonly consumes news is very different, however all three groups share TV as the most or second most common method.

People under 35 named social media as the most common way they consume news.

The two older age groups name radio and print newspapers as the other two most common ways they consume news.

Podcasts were the least common method for all age groups, however in the under 35s, a full **7.9%** of respondents report consuming news through a podcast in the past week.

MOST PEOPLE ACCESS 2-5 SOURCES OF NEWS IN A WEEK

Number of news sources accessed in past week

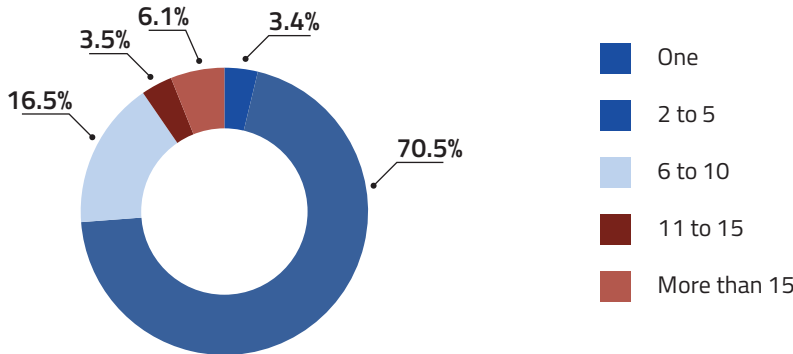


Figure 3, In the past week, how many news sources have you used?

AVERAGE NEWS CONSUMPTION SESSION LASTS FOR 5-20 MINUTES

Average length of news consumption session

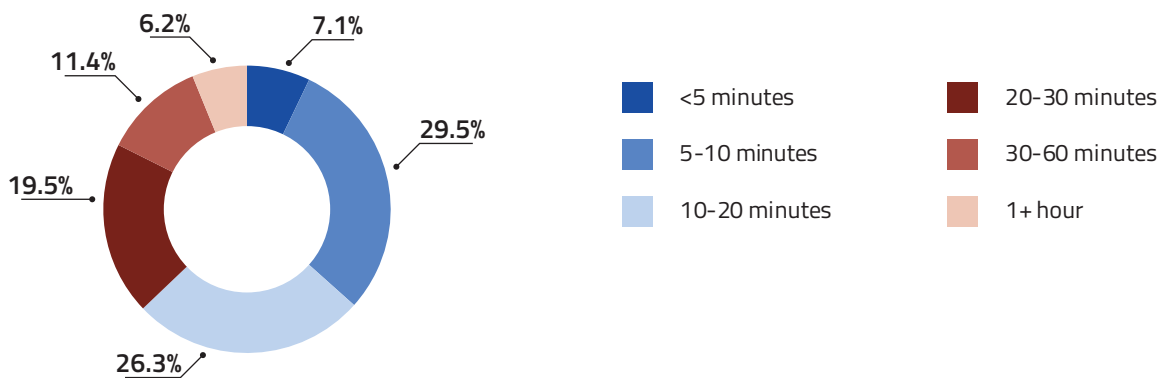


Figure 4, On average, how long do you consume news (read, watch, or listen) in one session?

The most common length of each news consumption session was in between 5-20 minutes. Still, there is a sizable portion

of readers who consume news for 30-60 minutes per session. This is a considerable attention time that publishers should make sure to leverage.

MORNING IS STILL PEAK MOMENT FOR NEWS CONSUMPTION

Interest in consuming news throughout the day

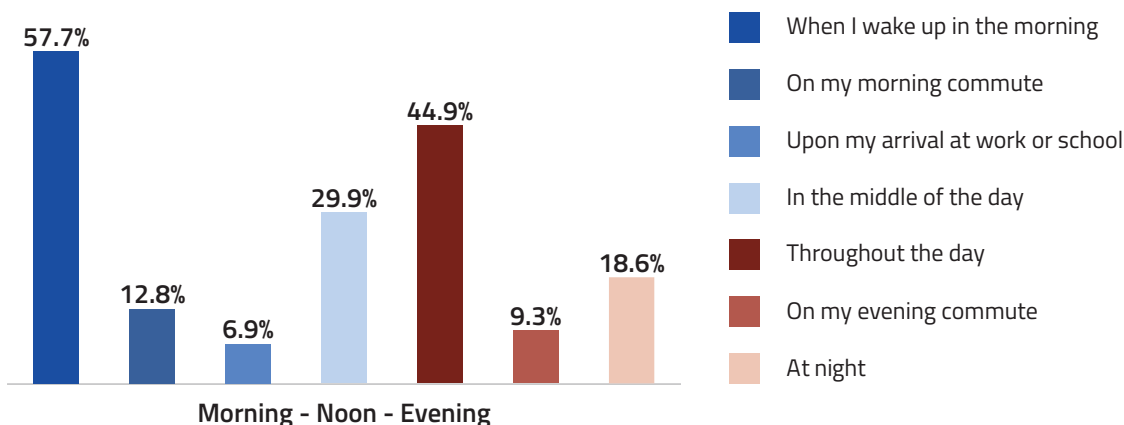


Figure 5, At which point in the day are you most likely to be focused on consuming news?

Respondents were most interested in the news when waking up (57.7%) or throughout the entire day (44.9%). The middle of the day was also a common time to be interested in news (29.9%).

MOST READERS ACCESS NEWS 2-5 TIMES A DAY

Frequency of news access

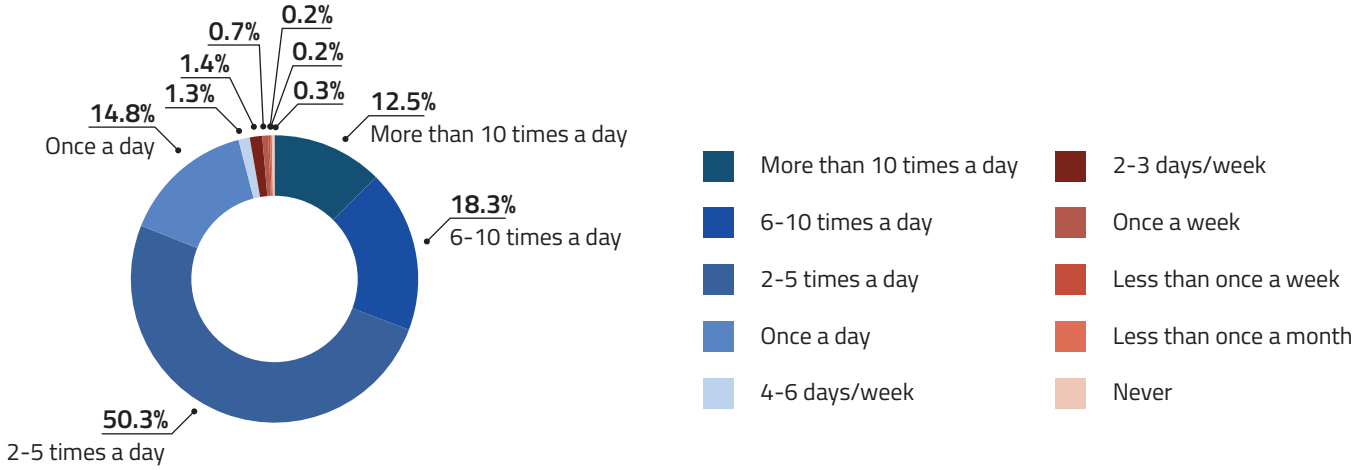


Figure 6, How often do you access news?

MOST READERS HAVE A HIGH INTEREST IN NEWS

Interest in news

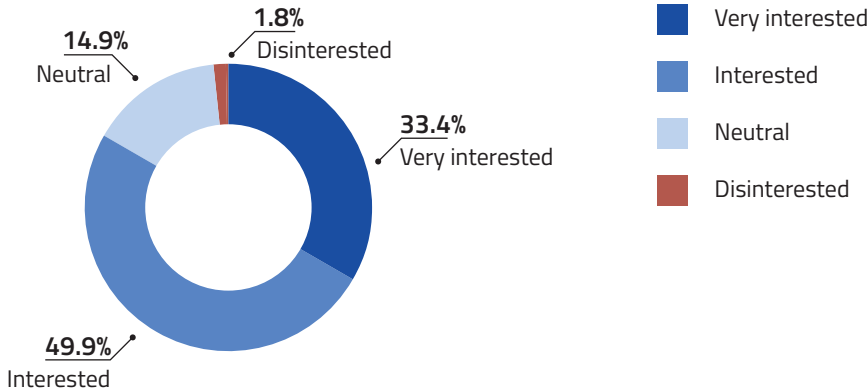
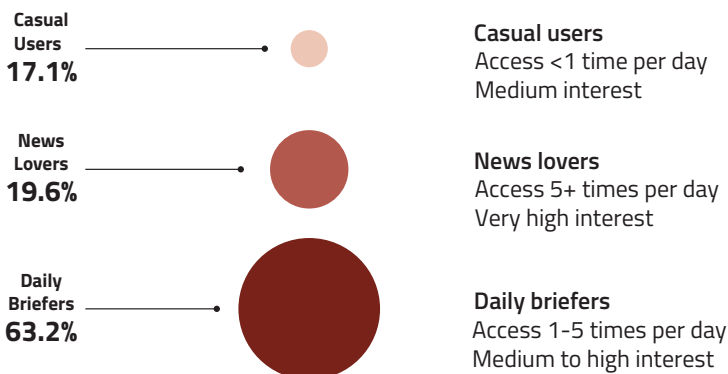


Figure 7, How interested are you in news?

DAILY BRIEFERS ARE THE LARGEST READER GROUP

News consumers segmented by frequency of access and interest in news



In our research, we often refer to [Reuters Digital Institute's](#) segmentation of digital news readers based on their level of interest in news and frequency of access.

Through our survey, we were able to reconfirm their finding that the largest group of news consumers are daily briefers, those who have a medium to high interest in news and prefer to be briefed one to five times a day.

Figure 8, How often do you access news? How interested are you in news?

READERS CONSUME NEWS TO STAY INFORMED, BUT ALSO FOR IN-DEPTH

Why people consume news



Figure 9, Please select the biggest reason(s) you read the news sources that you do.

The most common reasons why people read the news are to stay informed about their interest areas (**62.2%**) and to analyse and understand topics and events (**61.3%**).

BREAKING NEWS AND CREDIBILITY ARE IMPORTANT FOR PICKING NEWS SOURCES

Attributes important for picking news source

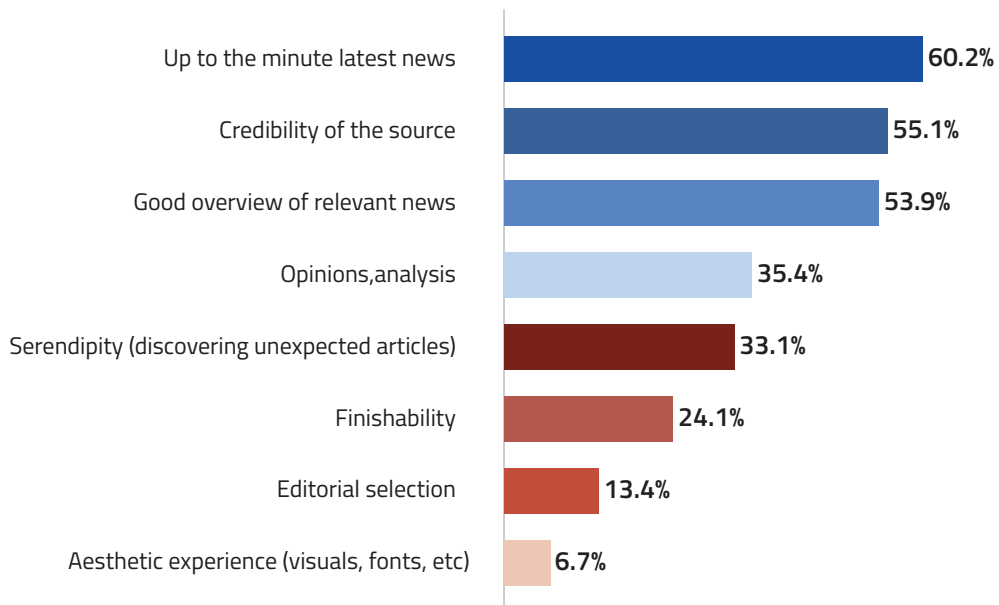


Figure 10, Which attributes are most important to you when consuming news?

Having the latest breaking news is the most important attribute when picking a news source (**60.2%**) for many respondents, while the credibility of the source is a close second (**55.1%**).

24.1% of respondents said that finishability was an important aspect. Finishability is a key element of editions—that is, they provide the feeling of completion for readers.

ATTITUDES TO PAYING FOR NEWS

LACK OF NEWS IN SPECIFIC FORMAT DRIVES READERS TO PAY FOR DIGITAL NEWS

The most common reason people started to pay for online news was because they could not get news in the specific format otherwise (**30.6%**) — a very interesting finding.

Some write-in results stood out as well, with one Belgian respondent explaining she pays for online news because she is allergic to the ink used in print newspapers.

Why readers started to pay for online news

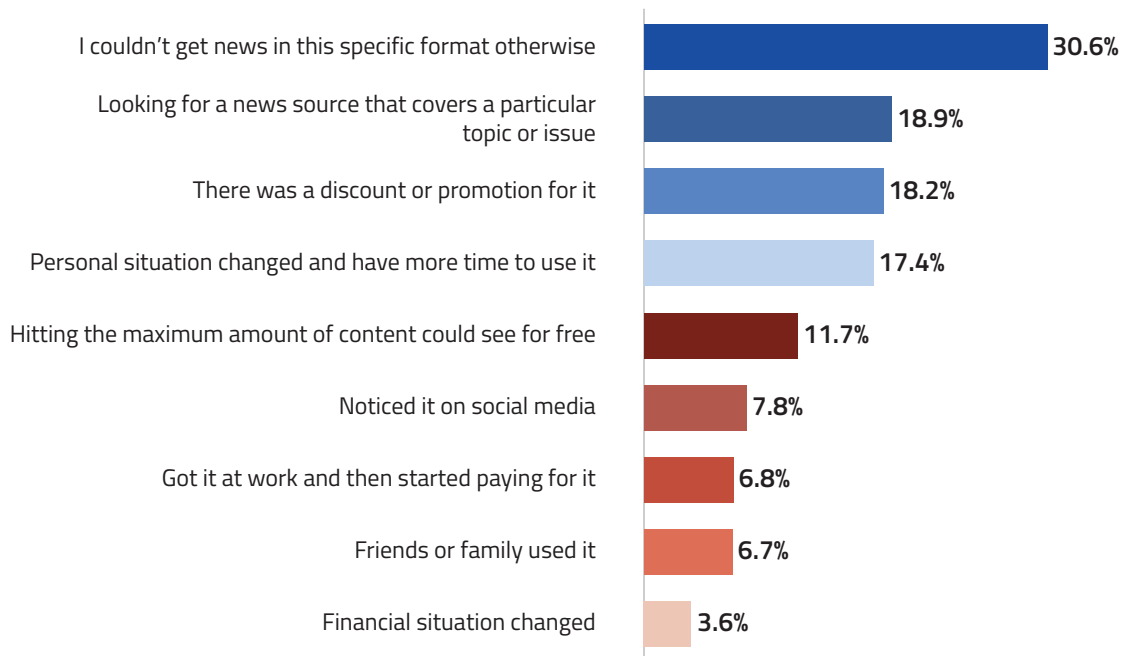


Figure 11, Why did you start paying for this news source?

Other write-in answers were more common. Most notably was the German concern for the amount of waste paper newspapers create: one respondent explained that he paid for online news instead of print news because it avoided the creation of "paper mountains". Indeed, **3%** of all German respondents wrote in with a similar comment.

Switzerland also had two interesting comments on why respondents started paying for online news: **"Free information is worthless"** and **"I consume, so I pay"**. This stands in contrast to the majority of respondents who do not pay for online news.

UNLIMITED ACCESS TO DIGITAL NEWS STORIES MOST APPRECIATED BENEFIT OF SUBSCRIPTION

Benefits from paying for online news

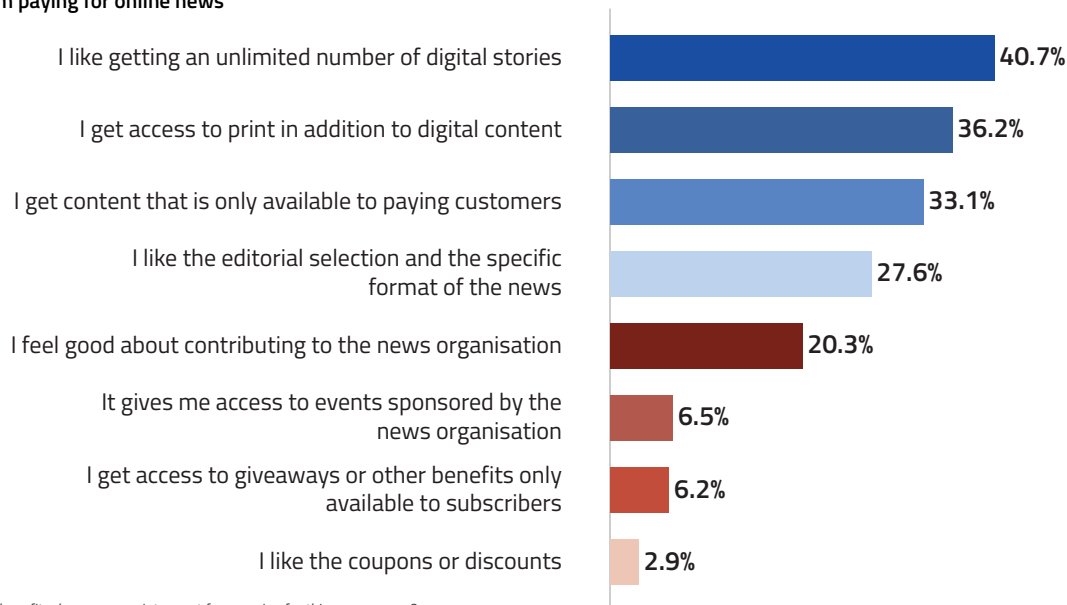


Figure 12, Which benefits do you appreciate most from paying for this news source?

The most common benefit respondents appreciated from paying for digital news was being able to access an unlimited number of digital stories (40.7%), followed by getting print in addition to digital content (36.2%).

We saw some trends in the write-in data as well. In Germany and Switzerland, a benefit that was mentioned by a few respondents was that the print newspaper comes too late to be included in their morning routines. Instead by paying for the digital version of the newspaper, they are able to access the day's edition already early in the morning.

0.5% of Swiss respondents explained that by paying for the digital edition, they are able to keep up to date on the local news wherever they may be. One respondent wrote that because he is often traveling he can "keep the newspaper habit through digital".

From the previous two charts, we see clearly that limiting access to free news will further drive readers to convert to paying subscribers.

SUBSCRIPTIONS MOST COMMON METHOD OF PAYING FOR ONLINE NEWS

How people have paid for online news in past week

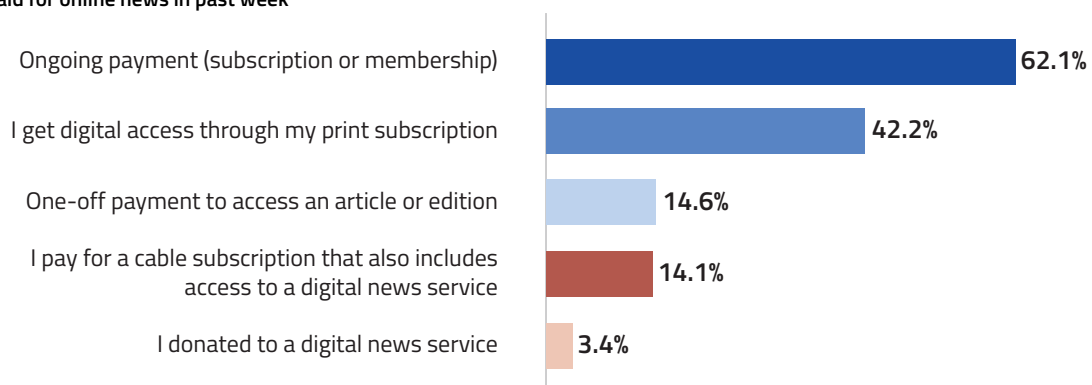


Figure 13, How have you paid for online news in the last year?

The most common way respondents had paid for online news was through an ongoing payment, such as a subscription or membership (62.1%) followed by having access to digital news via their print subscription (42.2%).

Though we have seen donations as an emerging trend for some publishers, it remains the least common way readers have paid for online content (3.4%).

MOST READERS WHO DO NOT ALREADY PAY ARE UNLIKELY TO PAY IN NEXT YEAR

Likelihood to pay in next year for online news

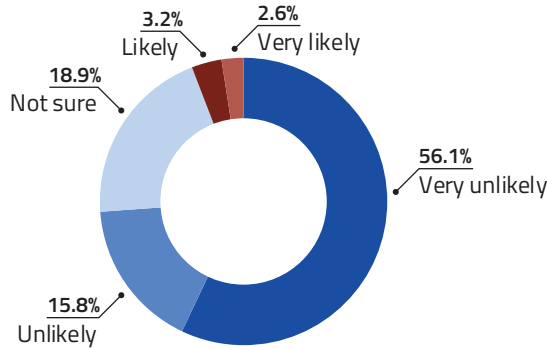


Figure 14, How likely or unlikely would you be to pay in the next year for online news?

Most respondents (**71.9%**) who were not already paying for digital news were (very) unlikely to pay, with only **5.8%** saying they are likely or very likely to pay in the next year. The remaining respondents were unsure if they would pay or not.

ABUNDANCE OF FREE NEWS ONLINE STOPS READERS FROM SUBSCRIBING

Reasons why people have not paid for online news

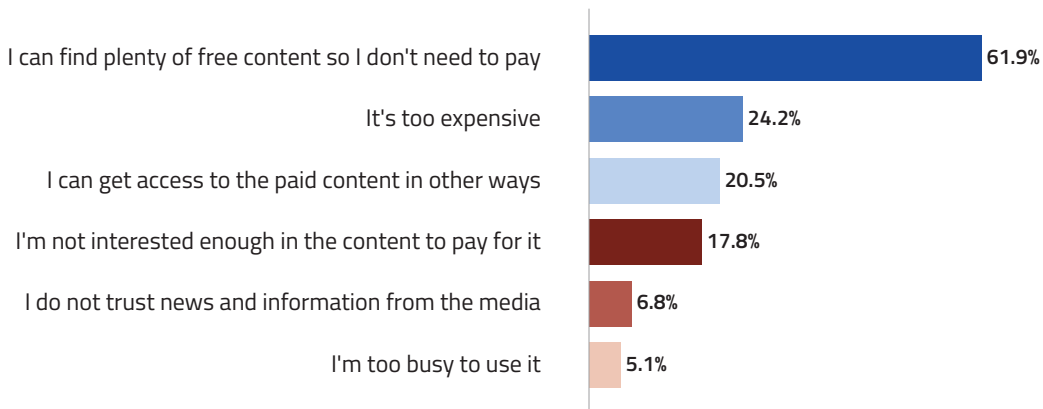


Figure 15, Which are the main reasons you haven't paid for online news in the past year?

The most common reason people have not paid for online news is because they can find enough free content (**61.9%**). The least common reasons why they had not paid was because they were too busy to use it (**5.1%**) and because they did not trust the news (**6.8%**).

Some respondents asked why they should have to pay, with one Belgian respondent writing "**information is a right that must be free, such as road use or health care.**" This was a common refrain in the interviews as well, with many respondents believing that advertising should be enough to fund news.

NEWS FORMAT PREFERENCES

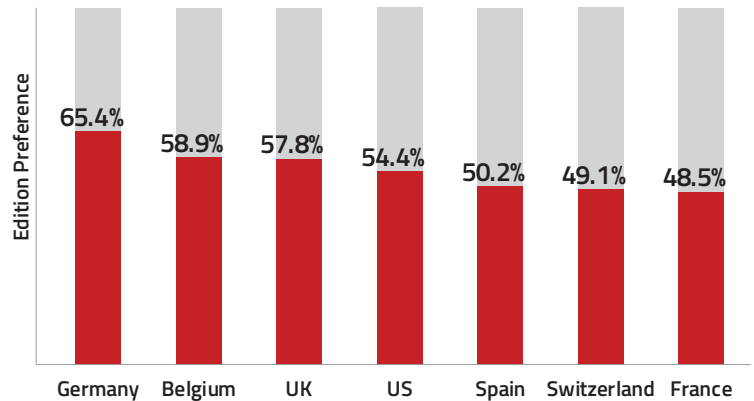
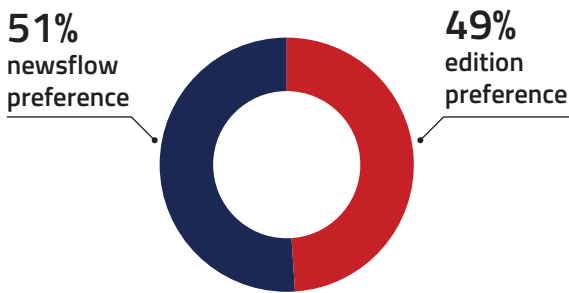
We asked readers their preferences for two types of news formats:

- **Edition:** bundled package of content, with a clear beginning and end
- **Newsflow:** continuously updating stream of information

We find that half of all readers prefer to read digital news in an edition format versus a newsflow stream.

EVEN SPLIT ON NEWS FORMAT PREFERENCE

News format preference



■ Newsflow preference ■ Edition preference

Figure 16, Which format do you prefer to read news in?

Germany has the highest proportion of edition readers, while France has the lowest.

READER PERSONA



JACQUELINE EDITION READER

🕒 age: 70

📍 United States

📰 In past week, consumed news via website, print newspaper, radio, & TV

👤 Pays for her local newspaper



I find my local newspaper a valuable source for the information I need—streams are just too distracting.

I consume news at my leisure and I truly make a ritual out of it. I sit down on my couch in the living room with a cup of dark roast coffee, light some fragranced candles, and leisurely go through the paper. My three dogs, Bijoux, Snoop Dogg and Abby snuggle beside me. This ritual is very satisfying and helps me start my day on a good note.



Perhaps one of the most eye opening findings from our research is that the even preference for editions holds true across age groups. This helps to disprove the myth that exists in the news industry that the edition format is preferred only in an older age group.

EVEN SPLIT ON NEWS FORMAT PREFERENCE WITHIN AGE GROUPS AS WELL

News format preference, by age

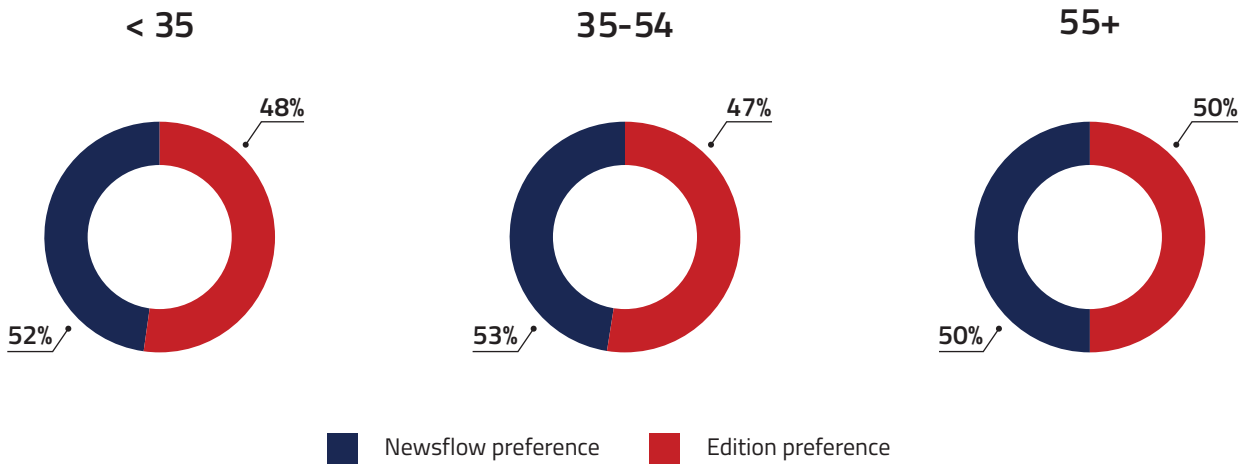


Figure 17, Which format do you prefer to read news in?

READER PERSONA



FRANCISCO
NEWSFLOW READER

- 🕒 age: 27
- 📍 Spain

- 📰 In past week, consumed news via websites, social media, TV, and a print newspaper
- 👤 Just started paying for his online news

“ The first time I thought about paying to access online news wasn't on the basis of any conviction, but because more frequently I bumped into a paywall. I couldn't read this or that article without having to pay or because I had reached the free articles quota for the month. ”

WHO ARE EDITION READERS?

From this research we identified two new segments of news consumers: edition readers and newsflow readers. While for many attributes these two personas are very similar, six notable differences that stand out are highlighted here.

EDITION READERS MORE LIKELY TO CHECK NEWS ONCE A DAY, NEWSFLOW READERS MORE LIKELY TO CHECK NEWS MORE THAN 10 TIMES A DAY

Frequency of news access, by format preference

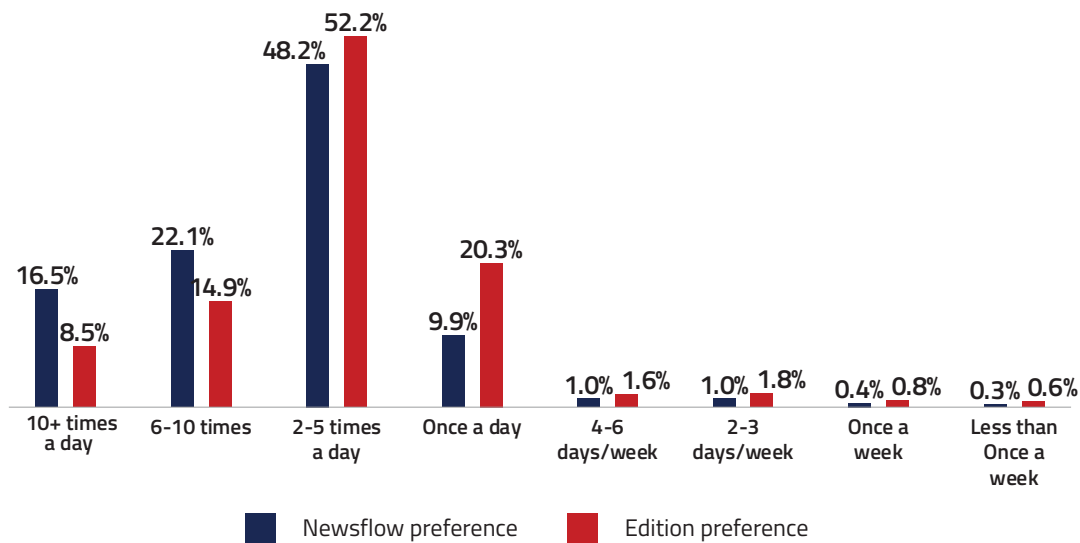


Figure 18, How often do you access news?

EDITION READERS MORE LOYAL TO NEWS BRANDS

Number of news sources consumed in the past week, by format preference

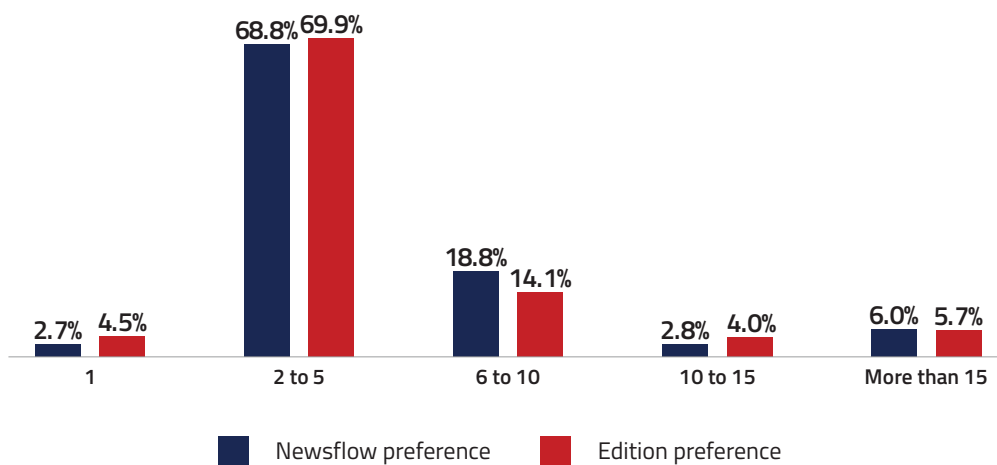


Figure 19, In the past week, how many news sources have you used?

Edition readers are more likely to only read one news brand in a week, while newsflow readers report accessing multiple news sources each week.

UNLIKE EDITION READERS, NEWSFLOW READERS FEEL THEY CAN ALREADY ACCESS ENOUGH FREE CONTENT SO DO NOT NEED TO PAY

Reasons for not paying for digital news, by format preference

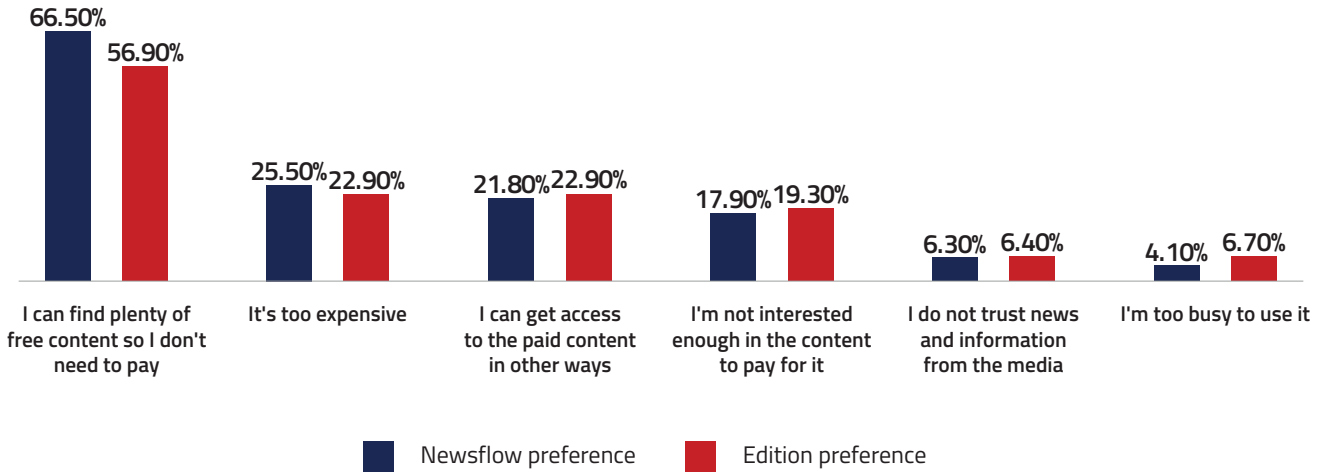


Figure 20, Which are the main reasons you haven't paid for online news in the past year?

Readers who prefer newsflow formats can find plenty of free newsflow content, so do not feel compelled to pay. On the other hand, there is limited free content in edition formats and thus less competition for reader attention.

EDITION READERS SPEND MORE TIME READING THAN NEWSFLOW READERS

Time spent consuming news, by format preference

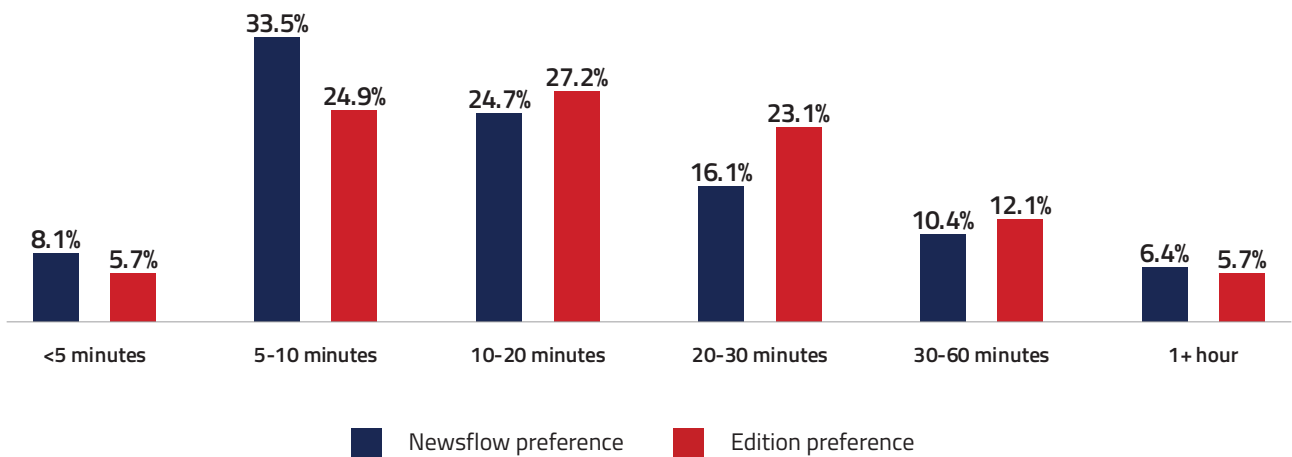


Figure 21, On average, how long do you consume news (read, watch, or listen) in one session?

Edition readers report spending longer consuming news in each session than newsflow readers. On average, newsflow readers spend 5-10 minutes during each session, while edition readers spend between 10 to 30 minutes.

EDITORIAL SELECTION IS MORE IMPORTANT FOR EDITION READERS, WHILE NEWSFLOW READERS VALUE HAVING BREAKING NEWS

Important attributes of news sources, by format preference

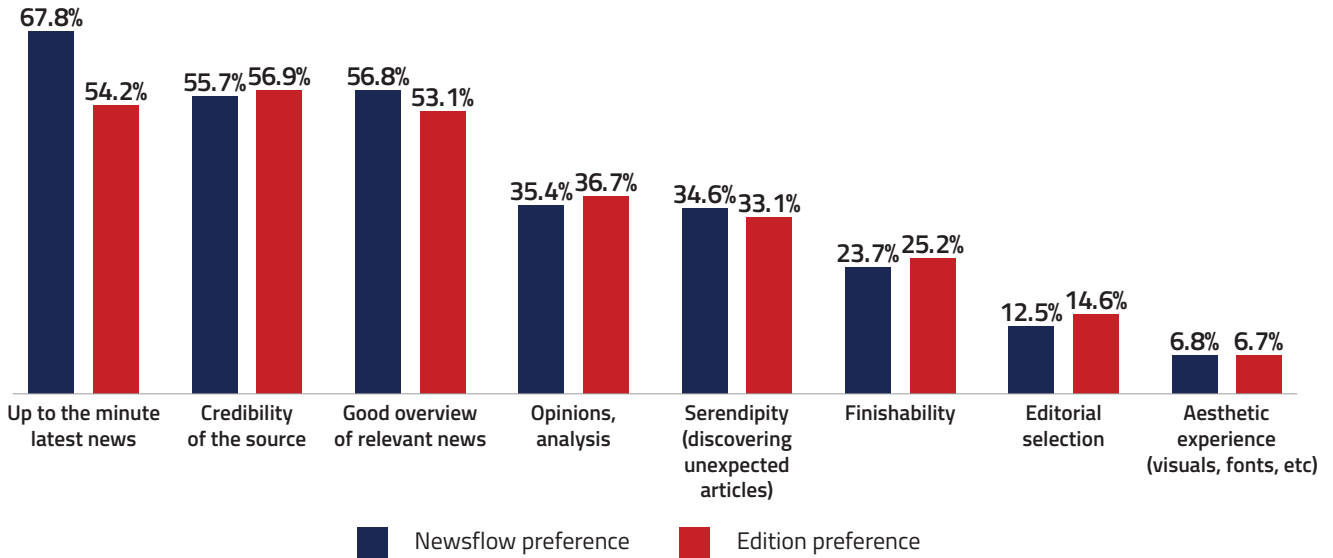


Figure 22, Which attributes are most important to you when consuming news?

Edition readers value editorial selection, finishability, and opinions/analysis more when picking a news source. They are less interested in up to the minute latest news than newsflow readers.

EDITION READERS MOST INTERESTED IN CONSUMING NEWS AT SPECIFIC POINTS OF THE DAY, NEWSFLOW READERS CONSUME NEWS DURING THE ENTIRE DAY

Consumption of news throughout the day, by format preference

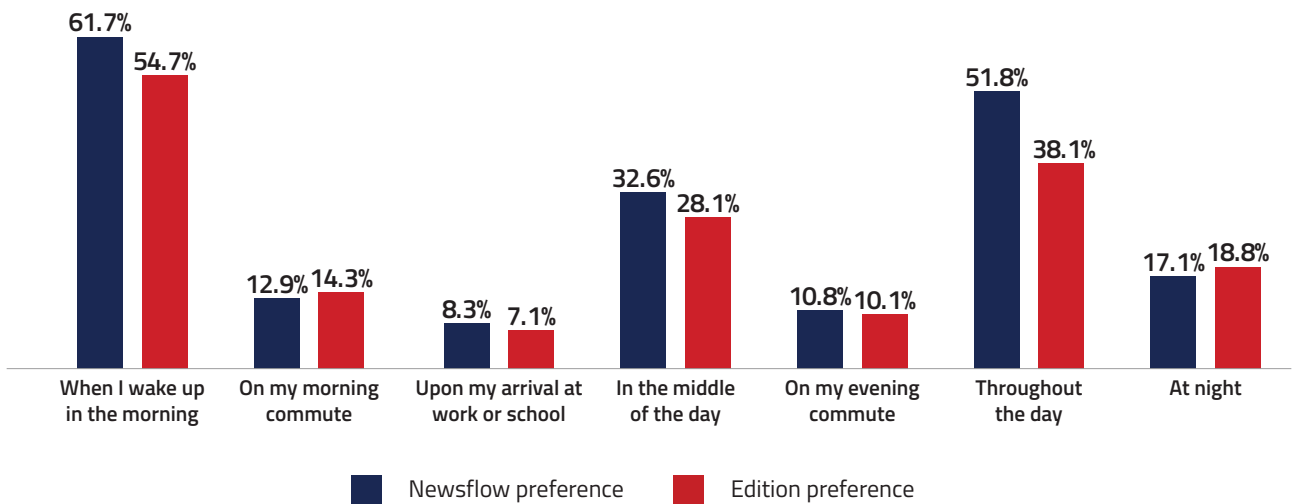


Figure 23, At which point in the day are you most likely to be focused on consuming news?

ANNEX: COUNTRY PROFILES

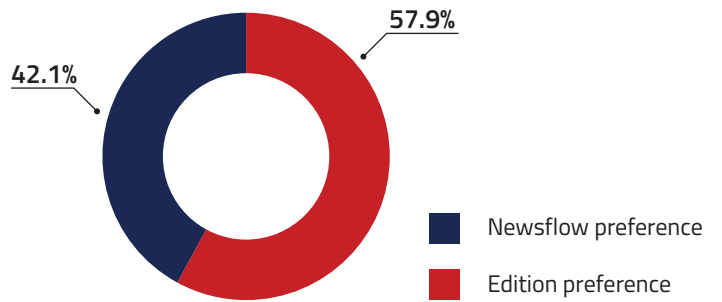
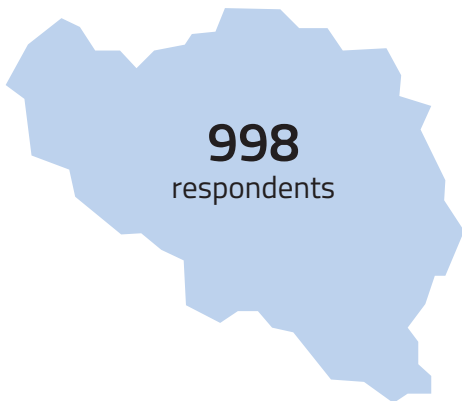
COUNTRY PROFILE: BELGIUM	<u>21</u>
COUNTRY PROFILE: FRANCE	<u>22</u>
COUNTRY PROFILE: GERMANY	<u>23</u>
COUNTRY PROFILE: SPAIN	<u>24</u>
COUNTRY PROFILE: SWITZERLAND	<u>25</u>
COUNTRY PROFILE: UNITED KINGDOM	<u>26</u>
COUNTRY PROFILE: UNITED STATES	<u>27</u>

COUNTRY PROFILE: BELGIUM

To receive a more detailed country profile on Belgium, please contact us at contact@twipemobile.com.

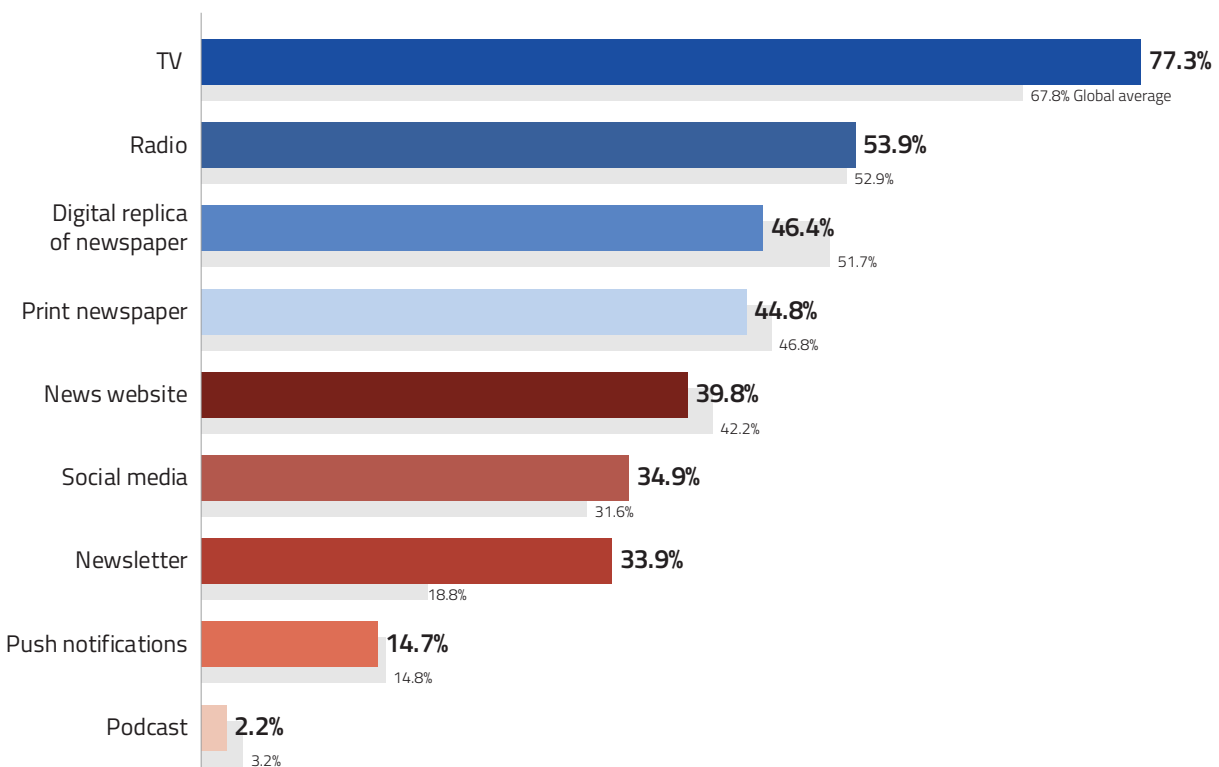
MAJORITY OF BELGIANS PREFER TO CONSUME NEWS IN EDITION FORMAT

Edition format preference in Belgium



NEWSLETTERS STAND OUT IN BELGIUM COMPARED TO GLOBAL AVERAGE

News consumption in Belgium, compared to global average



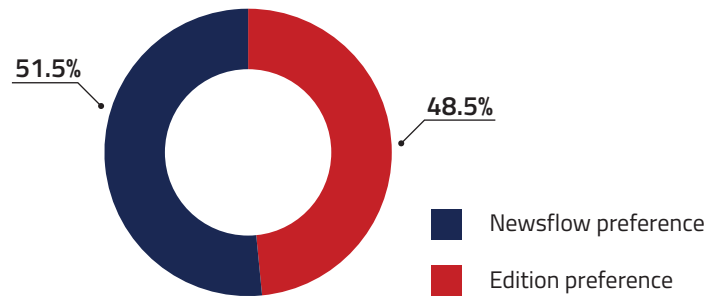
COUNTRY PROFILE: FRANCE

To receive a more detailed country profile on France, please contact us at contact@twipemobile.com.



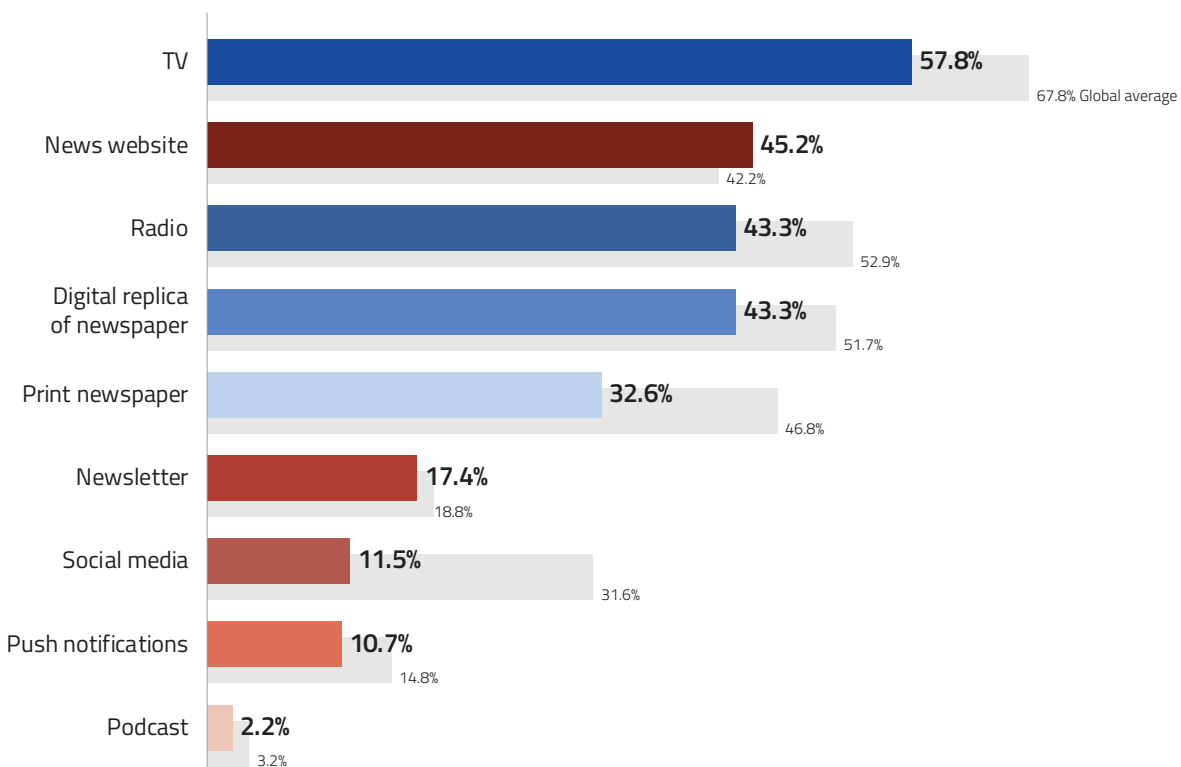
SPLIT NEWS FORMAT PREFERENCE IN FRANCE

Edition format preference in France



LOWER USAGE OF SOCIAL MEDIA AND PRINT NEWSPAPERS IN FRANCE COMPARED TO GLOBAL AVERAGE

News consumption in France, compared to global average

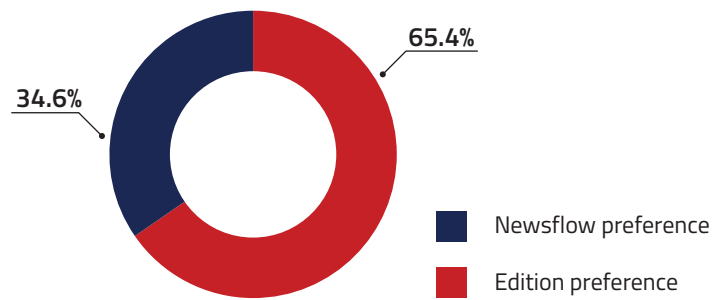


COUNTRY PROFILE: GERMANY

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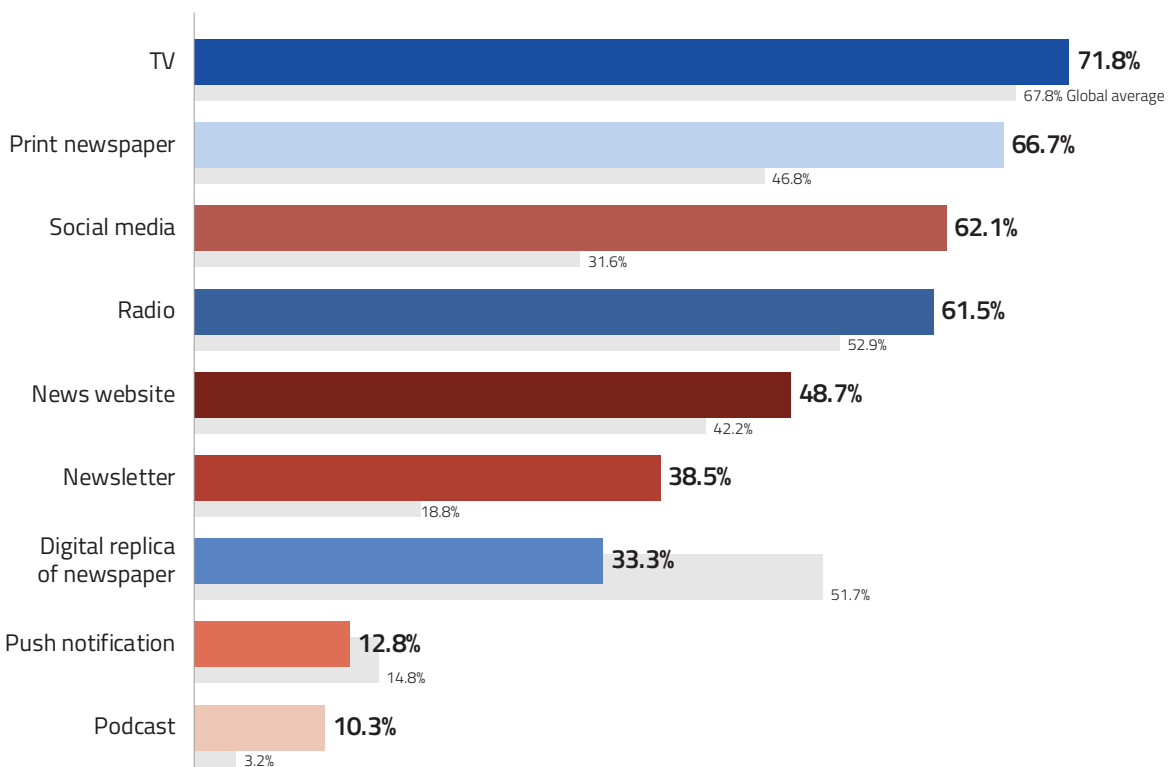
HIGH PREFERENCE FOR EDITIONS IN GERMANY

Edition format preference in Germany



NEWSLETTERS STAND OUT IN GERMANY COMPARED TO GLOBAL AVERAGE

News consumption in Germany, compared to global average

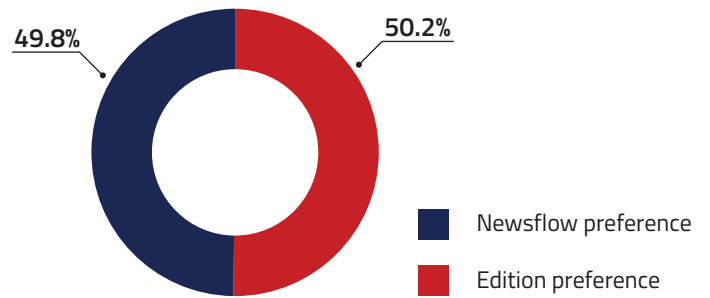


COUNTRY PROFILE: SPAIN

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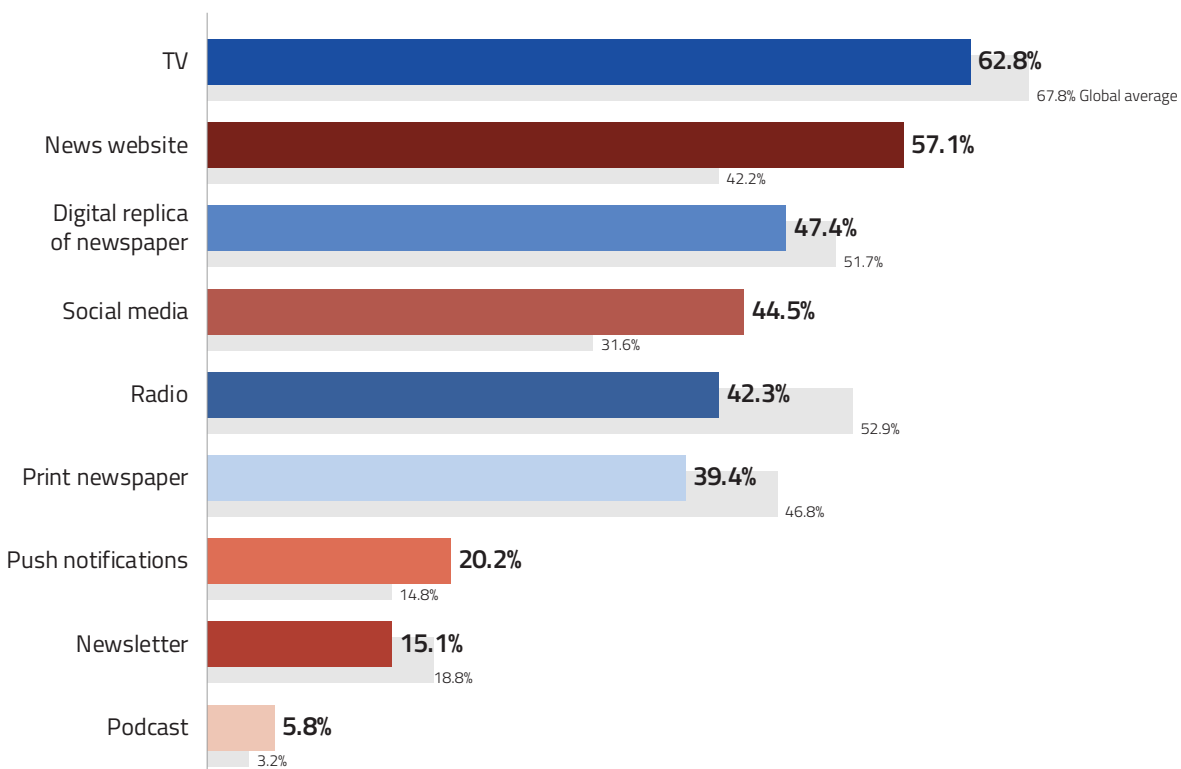
SPLIT NEWS FORMAT PREFERENCE IN SPAIN

Edition format preference in Spain



HIGH USE OF SOCIAL MEDIA FOR NEWS IN SPAIN

News consumption in Spain, compared to global average

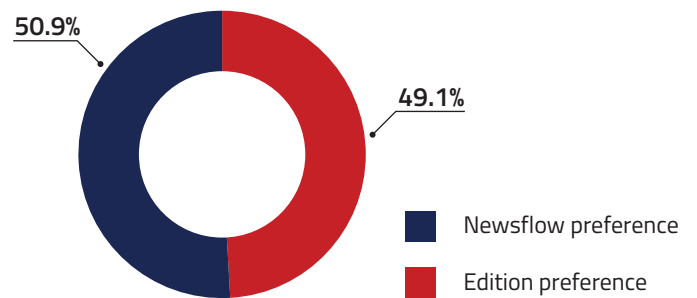


COUNTRY PROFILE: SWITZERLAND

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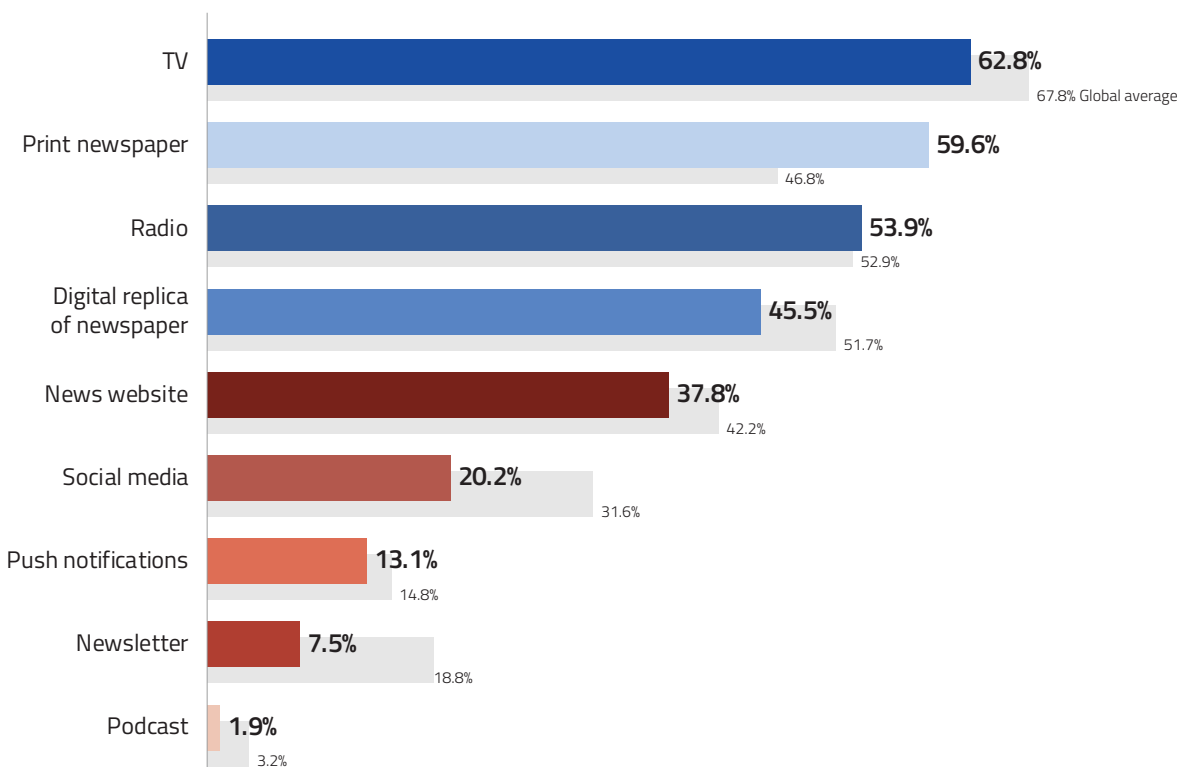
SPLIT NEWS FORMAT PREFERENCE IN SWITZERLAND

Edition format preference in Switzerland



LOWEST USAGE OF PODCASTS AND NEWSLETTERS IN SWITZERLAND

News consumption in Switzerland, compared to global average



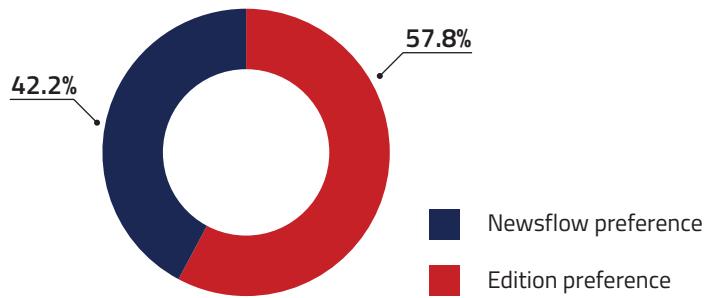
COUNTRY PROFILE: UNITED KINGDOM

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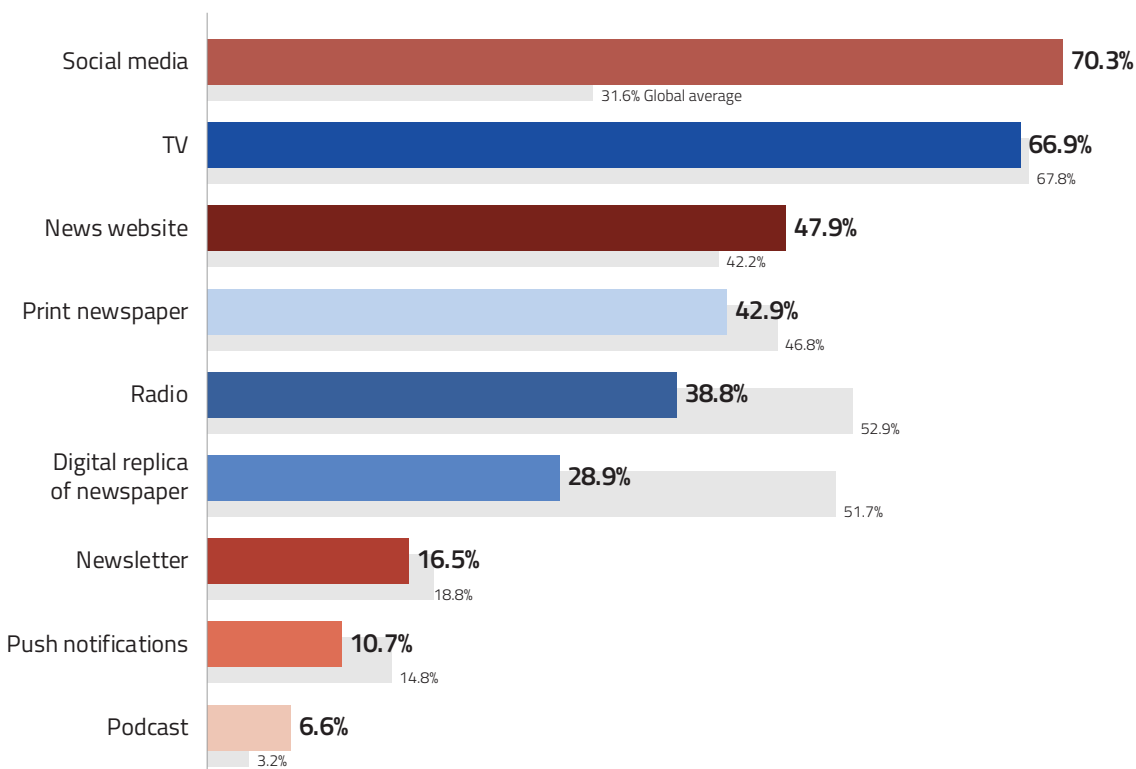
MAJORITY PREFER EDITION FORMAT IN UK

Edition format preference in the United Kingdom



SOCIAL MEDIA IS MOST USED NEWS SOURCE IN THE UK

News consumption in the United Kingdom, compared to global average

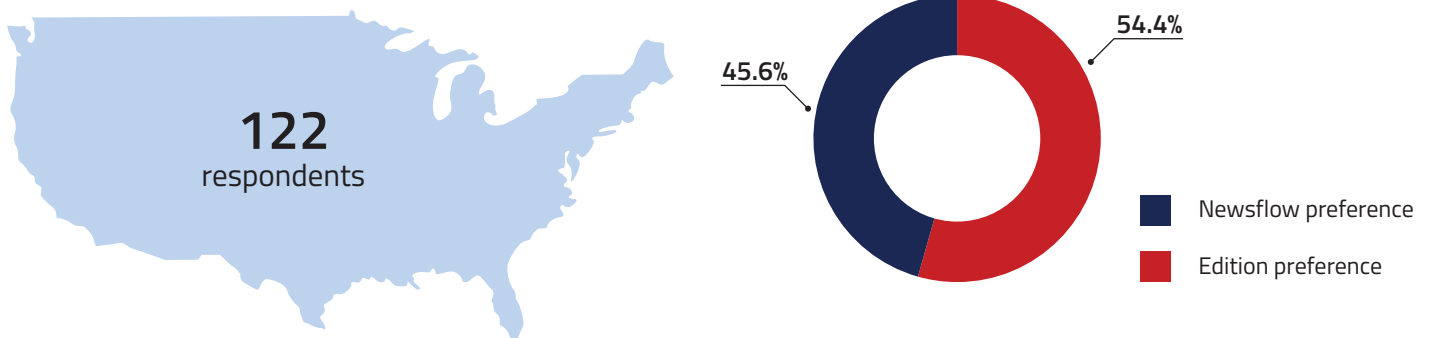


COUNTRY PROFILE: UNITED STATES

To receive a more detailed country profile on the US, please contact us at contact@twipemobile.com.

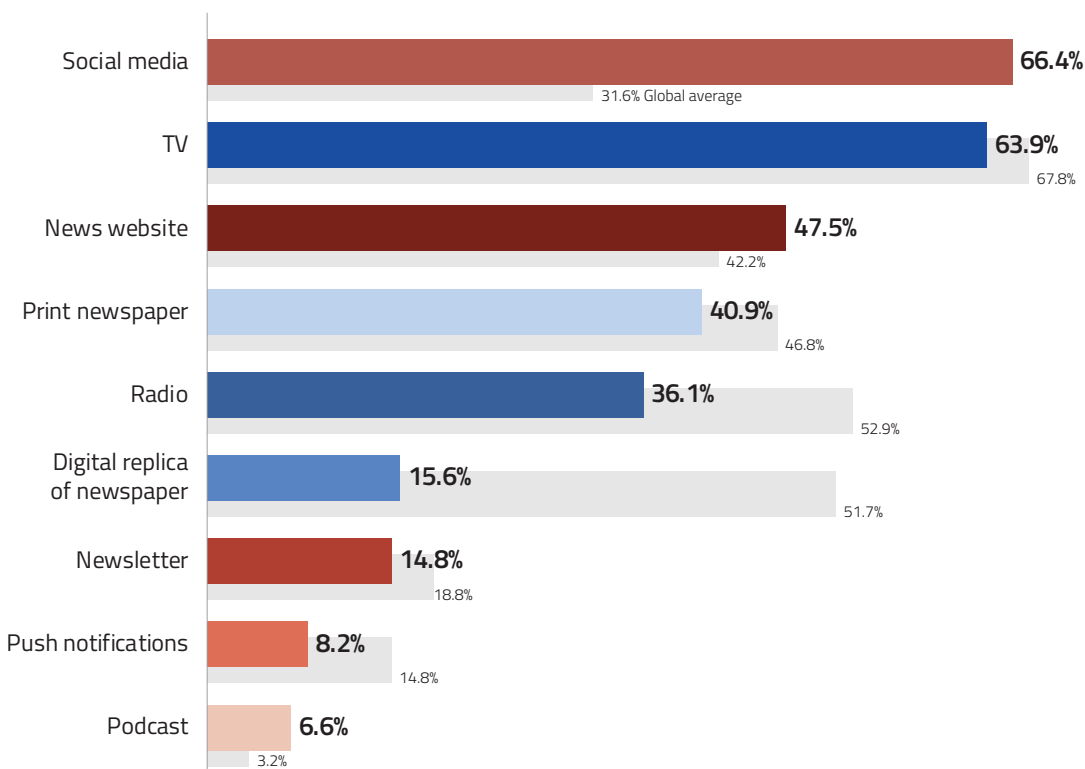
PREFERENCE FOR EDITION FORMAT IN THE US

Edition format preference in the United States



SOCIAL MEDIA AND PODCASTS STAND OUT IN US FOR NEWS SOURCES

News consumption in the United States, compared to global average



NEXT STEPS

In our first research report, we showed why digital-only editions such as *Espresso* from **The Economist** or *L'édition du Soir* from **Ouest-France** have been created and what has made them successful. In this new chapter in our **Reinventing Digital Editions** series, we focused more deeply on readers, their habits, motivations, and preferences. This research indicates that roughly half of all news consumers prefer to receive news in an edition format. This finding holds true across age groups and has been validated within several countries.

As we continue into the next stage of our research, we will focus more on the new technology being leveraged in the creation, distribution, and promotion of editions. We will look further into artificial intelligence to see where there is room for growth.

We will delve deeper into the value proposition for digital editions in our next chapter in this series.

QUESTIONS, COMMENTS, AND IDEAS

- Please share your thoughts with us at contact@twipemobile.com
- Follow us as we dive deeper into the future of news each week, with our newsletter [Twipe Insights](#)
- [Book a meeting](#) with us to discuss your digital product strategy and explore our technology solutions for publishers



MEGAN

NEWSFLOW READER

🕒 age: 20

📍 Belgium



In past week, consumed news via social media, website, radio, and push notifications



Has a paid subscription for digital news through family

“

After I get up, I watch a YouTube news show where every weekday world news is shared. This is centered around the United States, but other countries will also be discussed. If I have enough time in the morning, I read the local newspaper on the computer because we have a subscription. Throughout the day (at school, with friends, waiting for the bus) I visit Reddit on my smartphone. This is a website where many topics are discussed together, including world news. At school I study communication management where media and news are important, so there also newspaper articles, interviews, press conferences and other videos are shown. When I am at home, I often check the website of my local newspaper and sometimes I read the articles from the national newspapers. Throughout the day, I watch the headlines on the iOS news widget. I also have a national newspaper app on my smartphone because of a subscription, but I use it almost never.

”

We are grateful for the effort that has gone into the Reinventing Digital Edition research series and into making this report happen.

Thank you to the 4,000 readers who shared their news consumption routines and preferences with us. We also want to thank the publishers that worked with us:

- **Ouest-France** (France)
- **Grupo La Información – Diario de Navarra** (Spain)
- **L’Avenir** (Belgium)
- **Mindener Tageblatt** (Germany)
- **Le Quotidien Jurassien** (Switzerland)

Finally thank you to the entire team at Twipe, with a special thanks to Adriaan Van Gerven for his data analysis.

Please do not hesitate to contact us with any questions, comments, or ideas for further exploration.

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