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ENTERTAINMENT & MEDIA

THE FUTURE OF NEWS

Capturing a New Audience Online

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• Cross-Media Programming

THE FUTURE OF NEWS

Capturing a New Audience Online

The news industry has been in a slow transition for 20 years, but the pace of change has begun to accelerate dramatically: Portals, really simple syndication (RSS), and aggregators have become intermediaries, and blogs threaten to undermine consumers' relationship with mainstream media.

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Research Highlights

Web Site Customization: RSS Critical to Success

Customization and personalization have been hot topics since the earliest days of the commercial Web, but there have not been many new ideas in a long time. Really simple syndication (RSS) is becoming integrated into some of the best-known personalized sites as it presents new opportunities and challenges for sites wanting to offer their visitors more control. (October 31, 2005)

Online Local Content: Prioritizing Content, Blogs, and Community

While 26 percent of online adults prefer the Internet for national and international news, a much smaller portion prefers it for local news. Blogs are the latest fad to increase local community involvement. (March 31, 2005)

Executive Summary

The news industry has been in a slow transition for 20 years, but the pace of change has begun to accelerate dramatically: Portals, really simple syndication (RSS), and aggregators have become intermediaries, and blogs threaten to undermine consumers' relationship with mainstream media.

Key Questions

- How should news organizations position themselves online in the national and international news markets?
- What should local news organizations be doing to strengthen and grow the position of both their traditional media and online properties in their local markets?
- How can news organizations successfully address the emerging online news audience?

Key Findings

Online consumers look to cable news Web sites as much as they do to newspapers for national and international news: 30 percent visit cable news sites for the purpose of gathering news, while 29 percent read newspapers.

Two properties, Yahoo! and MSNBC.com, have emerged as the leaders in national and international news on the Web, with nearly 30 percent penetration within the category and growth rates of 15 percent to 35 percent.

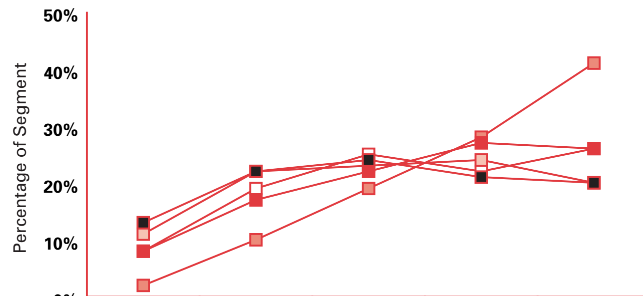
News media must go beyond using the Internet to serve their established audience and find a new audience of online users who may not be familiar with their traditional products. Only 25 percent of intensive newspaper readers are intensive online users.

News organizations must not only serve their traditional audiences online, but they also must find and capture the audience of online consumers they are not reaching currently. This will require deconstructing their Web site—treating individual stories (and not the Web site) as their most important product.

Understanding the New Audience for Online News

Newspapers' Audience Is Shrinking

Fig. 1 Online Media Consumption, by Age



	18–24	25–34	35–44	45–54	55+
Online users	13%	22%	24%	21%	20%
Intensive TV viewers	8%	17%	22%	27%	26%
Intensive newspaper readers	2%	10%	19%	28%	41%
Intensive online users	11%	22%	23%	24%	20%
Intensive magazine readers	8%	19%	25%	22%	26%

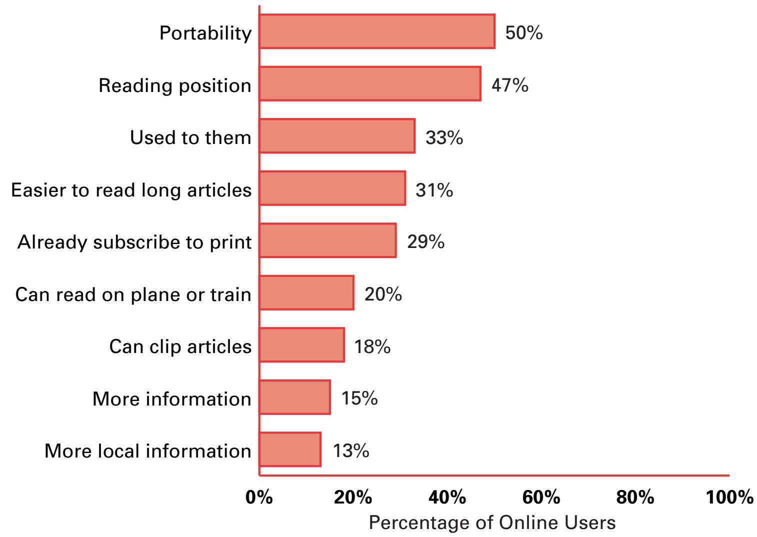
Source: JupiterResearch/Ipsos-Insight Entertainment and Media Consumer Survey (9/05), n = 2,991 (US only)

Intensive newspaper readers are substantially older than intensive users of other media are. JupiterResearch defines intensive users as the top 20 percent of users by hours spent with a given medium. When compared to intensive users of all other media, a much higher percentage of intensive newspaper readers are over age 55, and a much smaller percentage are under age 35.

According to *Editor & Publisher*, between 1970 and 1990, daily newspaper circulation remained flat, and since 1990, circulation has been declining. TV and geographic population shifts have been driving this trend, but the Internet is now in the process of establishing an entirely new set of news habits and expectations.

The Advantages of Print Over Online Are Declining

Fig. 2 Reasons Consumers Prefer Print Media to Online Media



Question: Why do you read magazines or newspapers in print rather than finding similar content and information on a Web site? (Select all that apply.)

Source: JupiterResearch/Ipsos-Insight Entertainment and Media Consumer Survey (9/05), n = 2,991 (US only)

The Web has established itself as an important news medium, and has displaced newspapers for many readers seeking timeliness and in-depth reporting. Readers' remaining preference for print over online rests on two shaky foundations: habit and form factor.

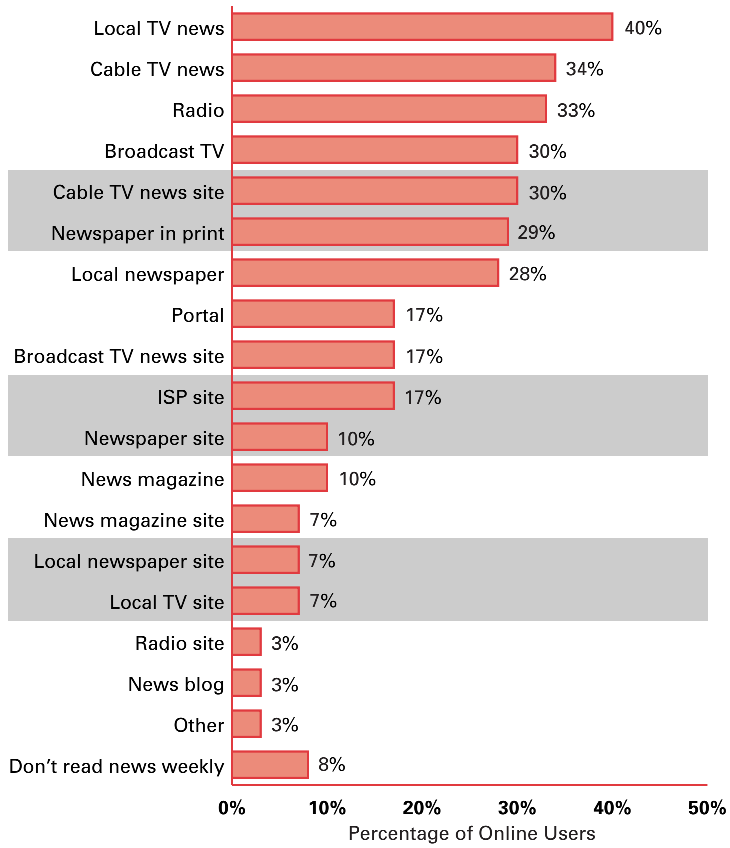
Habit is exemplified by survey respondents' declarations that they "already subscribe to" and are "used to" the print versions of magazines and newspapers. However, many newspaper readers are learning new habits. In addition, new habits are being formed among young people. It is already clear that intensive newspaper readers are older than intensive users of other media. Some preferences, such as "can clip articles," are not advantages of the physical form factor, although they are stated that way. Online media can be "clipped," so this preference represents a habit, rather than a true advantage of form factor.

Form factor preferences include "reading position," "easier to read long articles," and "can read on plane or train." Over time, these advantages will be diminished or eliminated by improvements in technology. Handheld devices are achieving higher resolutions, laptops are becoming lighter, and the prospect of digital paper looms on the horizon.

Print publishers, particularly newspapers, have been waiting for tablets and digital paper as the ideal platform for transitioning current print products to an electronic format. Newspaper prototypes developed for these within the industry look more like printed papers than like current Web sites. However, tablet devices are evolving as a result of the standards, content, and economies of scale established by personal computers and the Internet. They will almost certainly be seen as more flexible personal computers, rather than as an evolution of printed products. News products delivered to these devices are more likely to evolve from news Web sites than they are from newspapers.

Cable TV Is Winning the Race to Own Online News

Fig. 3 Percentage of Consumers Using Selected Media to Gather News



Question: Which of the following sources do you use to access national and international news on a weekly basis? (Select all that apply.)

Source: JupiterResearch/Ipsos-Insight Entertainment and Media Consumer Survey (9/05), n = 2,991 (US only)

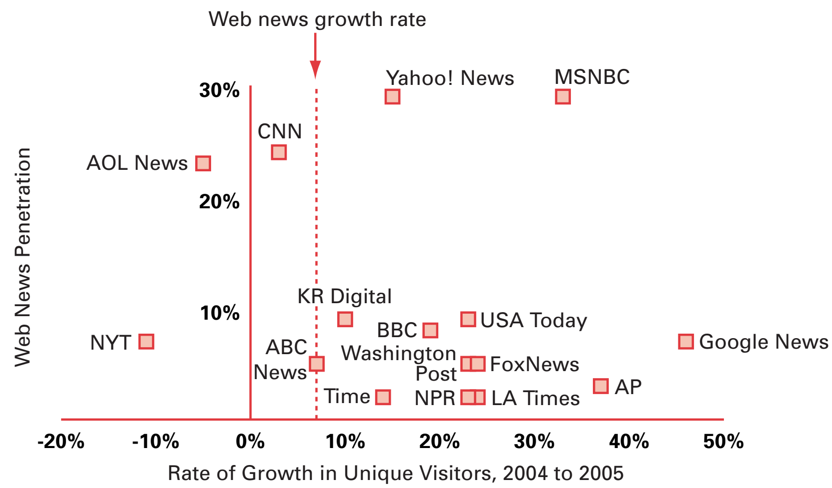
TV and radio dominate the audience for national and international news. The largest group of online consumers still get their national and international news from TV. According to a recent JupiterResearch survey, the four news media that online consumers most often consult weekly or more frequently for national and international news are local TV news, cable TV news, radio, and broadcast TV news. Cable TV news sites such as MSNBC.com and CNN.com are well established with the news audience. The big surprise is that online consumers are now a little more likely (30 percent versus 29 percent) to cite a cable TV news Web site than they are to cite a newspaper as their source of national and international news.

After newspapers, there is a steep drop in the percentage of users relying on the next set of sources, but aggregators have a strong position in the market. Portals and ISP news sites are tied to broadcast TV news sites (e.g., ABCNews.com), with 17 percent of online consumers citing each of them as a source. Portals and ISP sites are not news sites per se, and consumers are typically visiting them for other reasons and then subsequently using the sites' news. These sites are also often aggregators, displaying headlines from sites that actually generate the news. Increases and improvements in news sites' use of RSS feeds could improve the quality and attractiveness of portals and ISPs as sources of headline news.

Newspaper sites and news magazines are far down on the list, with only 10 percent of consumers using each medium at least weekly for national and international news. While this may not be surprising for news magazines, which have always been something of a niche product, it is startling that newspaper Web sites in aggregate have such a small self-declared audience. Meanwhile, seven percent of consumers use local newspaper sites, and another seven percent use news magazine sites. Aggregators such as portals and ISPs are getting a much larger penetration of the potential market for national and international news than these traditional sources are. Blogs are a very small share of the market, but their aggregated self-declared audience is already one-third the size of the audience for newspaper Web sites.

A Small Number of Sites Will Dominate National and International News

Fig. 4 Percentage of Online News Audience, November 2005 vs. Rate of Growth in Unique Visitors, December 2004 to November 2005



Note: Penetration reflects the average percentage of news category traffic that each site received from 1/05 to 10/05.

Source: comScore Media Metrix, 1/04–10/05 (US only)

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When the audiences (unique users measured by comScore Media Metrix) for the biggest news sites are charted by their penetration of the Web news audience and the growth in their audience (2005 average over 2004 average), several significant messages emerge. The news category grew by seven percent, compared with six percent for the Internet audience overall. Any news site with a growth rate of less than seven percent is losing ground. Only a small number of sites have the penetration and/or growth to be major players in national and international news in the future.

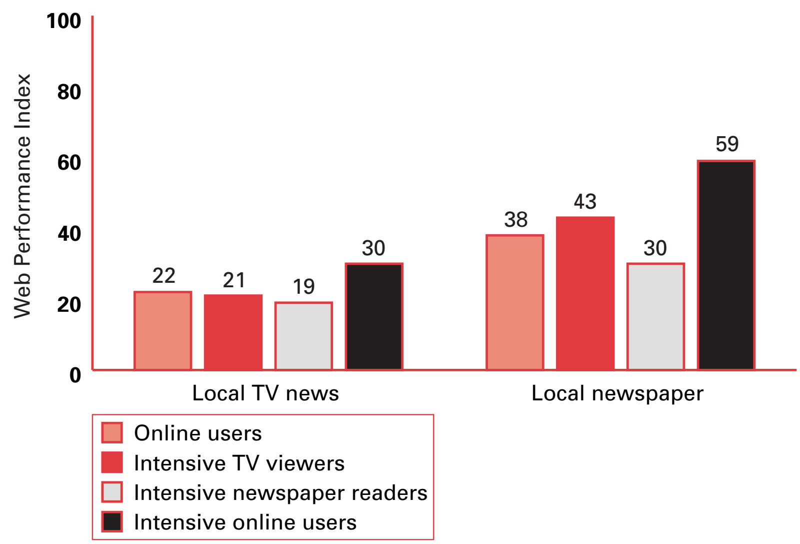
Yahoo! and MSNBC.com—a portal and a cable TV news site that is connected to the portal MSN.com, respectively—are the leading news Web sites, each having broken out from the pack to reach more than 26 million users. While Google News is much smaller, it has the fastest growth rate of any news site.

CNN is the third largest site, but is growing at a slightly slower pace than is the Web news category as a whole, so it is losing share. AOL is fourth, but it is shrinking in absolute size. ABCNews.com, an early leader in online TV news, is just keeping up with the growth of Web news.

The New York Times lost online readers in 2005. This raises the question of whether putting its most popular columnists in a paid subscription area (Times Select), although it appears to be financially successful, was a strategic misstep. Other national newspapers (e.g., USA Today, Washington Post) have similar market shares, but are growing much faster. None of these properties is growing much faster than market leaders Yahoo! and MSNBC are.

Newspapers and TV News Sites Are Missing Local Online Audiences

Fig. 5 Web Performance Index of Local News Sources, by Audience Segment



Note: Web performance index = Web site audience / traditional audience * 100

Source: JupiterResearch/Ipsos-Insight Entertainment and Media Consumer Survey (9/05), n = 2,991 (US only)

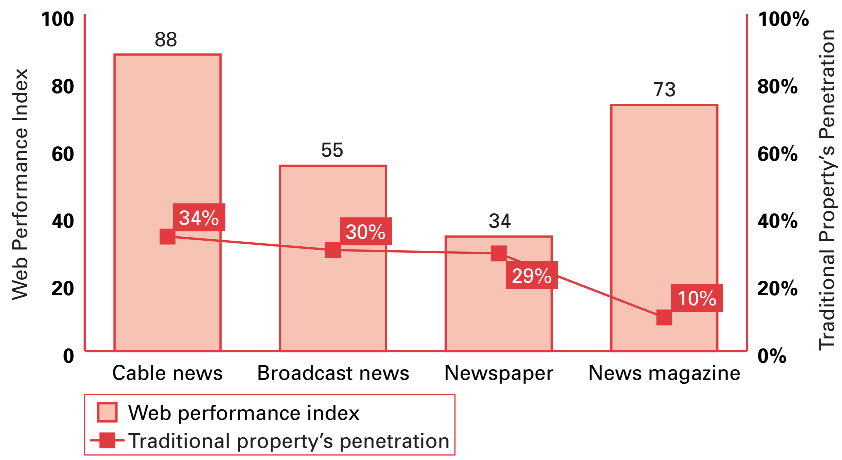
Local newspapers and TV news programs are not reaching their potential audiences online. JupiterResearch created the Web Performance Index (WPI) as an indicator of a traditional media property's success in reaching its potential audience online. Online consumers were asked what sources they use for local news. The WPI is calculated by dividing the percentage of respondents who reported using the online version of a medium (e.g., local newspaper Web site) by the percentage of respondents who used that medium's traditional version (e.g., local newspaper in print), and multiplying by 100.

Among the general online audience, the WPIs for local TV news and local newspapers are 22 and 38, respectively, showing that the Web sites of these news organizations are reaching only one-third to one-quarter of their potential. Intensive TV viewers are not much more likely to use either type of online property. Intensive newspaper readers are less likely to use the online versions of TV news programs and newspapers.

Local newspaper Web sites come nearer to a WPI of 100 for intensive online users only, suggesting that newspapers should be doing more on their Web sites to reach and serve this particular audience. Doing so will require more online promotion, as well as increased syndication, aggregation, Web-only content, reader feedback on stories, and permanent links on stories.

Cable News Web Sites Have Found Their Online Audience

Fig. 6 Web Performance Index vs. Off-line Market Share of News Sources



Note: Web performance index = Web site audience / traditional audience * 100

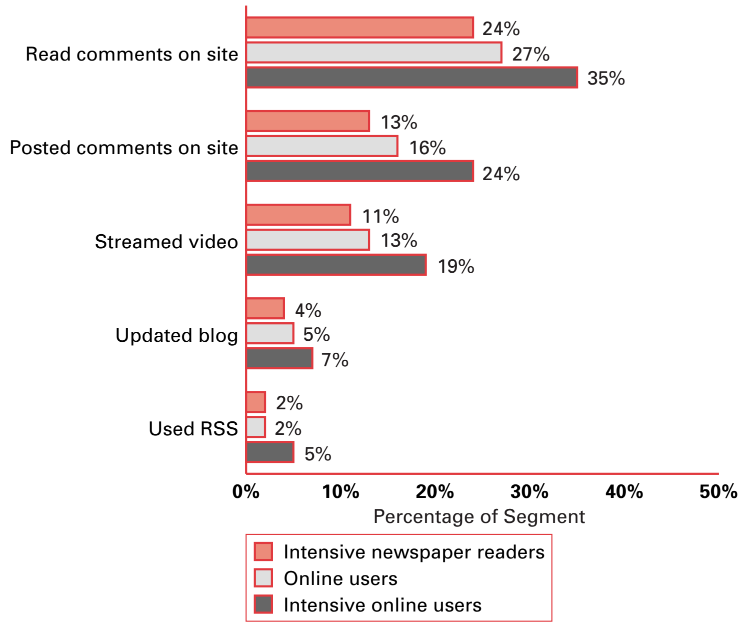
Source: JupiterResearch/Ipsos-Insight Entertainment and Media Consumer Survey (9/05), n = 2,991 (US only)

In national and international news, the WPI reflects the growth/penetration data in Figure 6. Portals and ISPs do not have a WPI, because they don't have an off-line property to index against. Cable news has a very strong profile in the WPI calculation. Not only did more online consumers report using cable news for national and international news than reported using any other medium, but it has the highest WPI of any medium. At current growth rates, there is no reason why it cannot have a WPI greater than 100, reaching a larger audience online than it is reaching off-line.

Newspapers and broadcast TV news have not yet reached their potential audiences online. As a category, news magazines have a strong WPI, but their overall audience is so much smaller than that of other off-line media sources that it will be difficult for the individual sites to achieve critical mass on the Web as standalone online properties.

Newspaper Readers Are Not the Most Savvy Web Users

Fig. 7 Consumers' Use of Advanced Media-Related Features, by Audience Segment



Question: Which of the following activities have you conducted monthly or more frequently in the past year? (Select all that apply.)

Source: JupiterResearch/Ipsos-Insight Entertainment and Media Consumer Survey (9/05), n = 2,991 (overall online users, US only), n = 510 (intensive newspaper readers, US only), n = 654 (intensive online users, US only)

Intensive newspaper readers are less likely to employ a variety of features offered on online news sites, such as reading and posting comments on a site, streaming video from the Internet on their computers, updating their own blog, and using RSS to receive news headlines. It is likely that their lower interest in leading-edge Internet activities is because intensive newspaper readers tend to be older than average online users are.

These data suggest that newspapers must have a two-pronged Internet strategy. They must address the needs of their core audience, who are likely to want an Internet product that seems familiar to users of the paper product. And they must address the needs of younger, more Internet-oriented users, who are more familiar with the advanced communication and navigation features of 21st-century Web sites. These two audiences are not the same. Only 25 percent of intensive newspaper readers are intensive online users. To neglect the needs of either audience is to court failure.

News Organizations Must Adopt the Grammar of the Web

Fig. 8 Adoption of Important Web Features by News Media Sites

	Typical blogger	CNET News.com	Portal	Cable news site	Newspaper site
Syndication	●	◔	●	◕	◕
Aggregation	◑	◔	◕	○	○
Permalinks	●	●	○	○	○
Online promotion	●	◔	◑	○	○
Multimedia	○	●	◕	◕	◔
Outside links	●	●	●	◑	◑
Feedback on stories	●	●	◔	◔	○
Web-only content	●	●	◔	○	○
Web-style writing	●	●	○	○	○
Trackbacks	●	○	○	◑	○

Low ○ ◔ ◑ ◕ ● High

Source: JupiterResearch (12/05)

Intensive online users are being conditioned by a whole range of sites, but especially by blogs, to expect more communication and accountability from news sites. Such sites can take advantage of advances in Web technologies and protocols to improve the quality of the experience they offer to users, as well as market their site more effectively. Figure 8 shows a range of features, many of which have been advanced significantly by blogs, and all of which are now commonplace in many users' experience. The features are ranked by relative impact on a site's attractiveness to sophisticated online users. The scores represent adoption by sites in a category, although there may be notable exceptions.

Syndication is one area in which the majority of news organizations have made a great deal of progress. Most sites now offer RSS feeds, and many have taken the additional step of making them customizable. Because of the sheer volume of headlines they offer, news sites must adopt customizable feeds to make them fully usable.

Aggregation is an area of tentative steps. A small number of news sites are experimenting with private-label RSS readers. JupiterResearch is aware of no major news sites that offer customized aggregation of feeds on their pages, a standard feature of portal sites.

Permalinks assume that a story's URL will not change and that the story will remain online. Unless there is a compelling reason, past news stories should no longer be sequestered in paid, proprietary databases that prevent them from being indexed by search engines, and linked to and tagged by users. They should have a URL that is easy to use and never changes. The UK's Guardian newspaper reports that one-third of the articles read on its site are stories that are more than one month old. Portals are at a disadvantage here because they do not generate their own content and cannot assure it will be available permanently.

Online promotion is necessary because Web properties should be promoted on the Web as well as via their parent media properties. They have a large potential audience of members who do not use the parent property. One key element of promotion is the use of permalinks and other features that encourage links from bloggers. Portals have an advantage because they can promote their news through their other properties.

Multimedia is emerging as a key content area. News properties, especially those of TV news organizations, are beginning to use more video and animation to tell stories. However, this activity is still in its infancy.

Linking cuts both ways. Good practice means linking outside the main site. This will also encourage bloggers to link to a news site.

Feedback facilities are critical. Virtually all bloggers allow readers to comment on stories. Yet, very few news sites permit this, resulting in opportunities for other sites to host discussion of a news organization's stories and alienating potential readers who are biased against "mainstream media." Permitting comments is easier for local and focused sites than it is for general news sites. Comments are a potential competitive advantage for new entrants into a news market. CNET's News.com does well in this area.

Web-only content and Web-style writing will become essential as well. In the long run, news organizations will have to write news specifically for the Web and other online media. Until that time, most news will be repurposed from other media. News sites currently offer little Web-only content—and, consequently, little Web-style content.

Trackbacks list all, or most, sites that link to a story. For technical reasons, trackbacks have been subject to spam recently. However, a site could host edited lists of interesting sites and blogs linking to its news. Newsweek's Web stories list pages that link to its stories.

Local Markets Are Up for Grabs

The markets for news and advertising in the US can be divided into local and national segments. While there is no necessary connection between advertising and news, advertising is still the principal source of revenue for online news sites, and the Internet is a major threat to the advertising revenue of local news organizations.

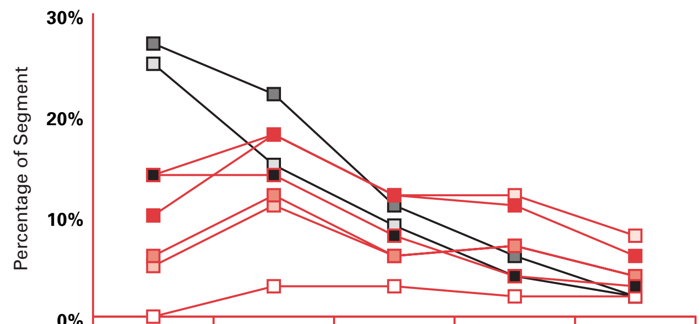
Local news organizations, whether they are newspapers, TV, or radio, have not traditionally had a significant share of national advertising. Their core advertising customer base consists of local businesses. However, on the Internet, local news organizations have depended upon a larger share of national advertising while the local advertising market continues to develop. JupiterResearch estimates that the local online advertising marketing was $3.2 billion in 2005. However, 72 percent of this market consisted of local classifieds, in which local newspapers have significant competition from national players such as Craigslist, eBay, Monster.com, AutoTrader, and CareerBuilder. Meanwhile, Yahoo! and Google are working furiously on building products that are competitive in the local advertising market.

The national market, while much larger than any given local newspaper market, or even the collective markets of a large newspaper chain, is also a brutally competitive market in which newspapers' content and audiences are not particularly desirable. Faced with ruthless competition in the national market and strong potential entrants in their core markets, local news organizations should be increasing the depth of their local coverage and courting local audiences beyond their core users to shore up their home markets before it is too late to defend them.

To reach Web audiences who are not newspaper readers in their home markets, local newspapers should adopt online marketing techniques. Because the local online advertising market is relatively undeveloped, newspaper publishers can take advantage of inexpensive and unsophisticated local advertising markets. This has the added advantage of giving the paper an opportunity to learn how to serve its local advertisers better. At the most basic level, local newspapers should be the top result for searches on the names of their communities, neighborhoods, points of interest, prominent citizens, and significant events. They should be advertising prominently on local blogs, Web sites, and mailing lists. They should promote partnerships with local Web sites, encouraging these sites to carry custom headline feeds or selections of content appropriate for their audiences. Finally, they should provide promotional incentives to local merchants who promote the newspaper's site or headlines. It is critical that local newspaper sites offer content that respects the grammar of the Web, or at least be moving in that direction, for such a strategy to be successful.

Mobile News Is Still a Nascent Market

Fig. 9 Percentage of Consumers Interested in Selected Content via Cell Phones, by Age Group



	18–24	25–34	35–44	45–54	55+
Sports scores	14%	14%	8%	4%	3%
Breaking news	10%	18%	12%	11%	6%
Headlines	6%	12%	6%	7%	4%
Traffic	5%	11%	6%	7%	4%
Weather	14%	18%	12%	12%	8%
Stock prices	0%	3%	3%	2%	2%
Music	25%	15%	9%	4%	2%
Games	27%	22%	11%	6%	2%

Question: Which of the following types of content are you interested in receiving on your cell phone? (Select all that apply.)

Source: JupiterResearch/Ipsos-Insight Entertainment and Media Consumer Survey (9/05), n = 2,991 (US only)

In the long run, news will have to transcend the Web and be available via a wide variety of protocols and standards on an even wider variety of devices. The challenge is deciding what to do in the short run to prepare for these changes. While the evolution of such standards and devices is unclear, there are things publishers can do now to prepare.

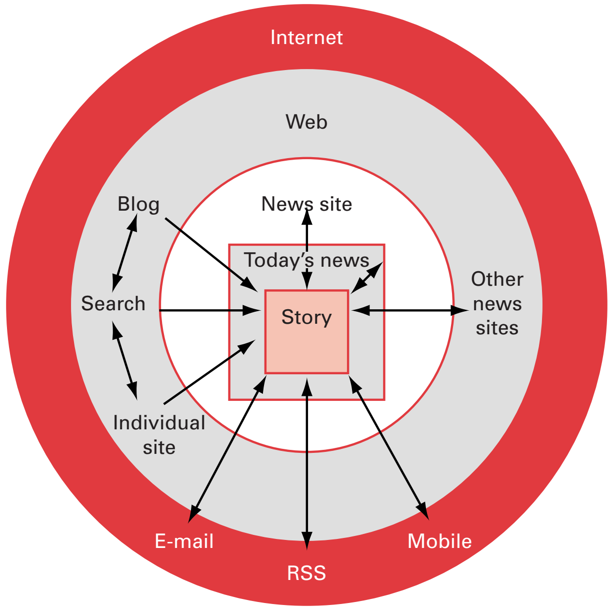
In the near term, news organizations should not focus on mobile devices at the expense of the urgent task of deepening and improving their Internet services. Fewer than 18 percent of online consumers of any age expressed interest in breaking news or headlines. The most substantial interest (at 18 percent) was among those ages 25 to 34. Consumers are most interested in games and music; this desire is especially strong among those ages 18 to 24.

In the short term, news organizations should prioritize the opening of their stories for linking and syndication and address other Web grammar issues rather than focus on delivery of headlines to mobile devices. However, now is a good time for news sites to experiment and test the ability of their infrastructure to deliver news in multiple formats and protocols, including those for mobile devices. Yet, it would be premature to place a major bet on any mobile carrier, device manufacturer, protocol, or markup standard.

By deconstructing their Web sites now, news organizations can better prepare themselves for a future in which users will gather information in multiple ways and on multiple devices.

Web News Organizations Should Deconstruct Their News Sites

Fig. 10 Overview of Story-centric Web Design



Source: JupiterResearch (12/05)

News organizations must find new audiences online, adopt the grammar of the Web to attract and keep them, focus on local news and information to serve them, and build a system that can deliver and aggregate news to multiple devices and sources.

To achieve these goals, news organizations must deconstruct their Web sites before their users do it for them. While it is desirable to deliver a Web site that is a coherent product, it would be a mistake to assume that any Web site is experienced that way. Web publishers cannot predict where users will enter their site, nor should they attempt to control it. Instead, it is important to assume that any page is an entry point and put enough navigation and information on that page to draw people further into the site. This concept can be thought of as story-centric design. While Web designers should assume that any story could be a user's entry point to a site, story-centric design treats the story as the basic service delivered to the user.

Publishers must make their sites the archive and Google their search page. Every page should be permanent and accessible at a single address indefinitely. Access should be direct, without a registration requirement. Archives should be open and permalinked, available to anyone who finds the site. Readers should be encouraged to bookmark, share, and link to their favorite stories, while sites should highlight the most linked to stories in their archives. Publishers must take advantage of the metadata included in links from readers, bloggers, and sites to make their stories more accessible on search engines. If users search Google for the name of their mayor, a story from the local newspaper should be the first item they see in the results.

Local publishers must focus on local customers. Instead of using registration to filter out non-local customers, a focus on regional news and information will attract these desirable users. The local audience will form itself; less intrusive means, such as user surveys and IP address information, can be used to tell advertisers what percentage of the audience is not local. Local publishers must deliver more local breaking news on the Web to appeal to both traditional audiences and new, Web-only users.

It is critical for news sites to focus on syndication and aggregation. This will yield Web traffic and provide a platform for delivering headlines to other media. In 2006, Web sites should be able to deliver customized feeds of news and classified advertising to their users. They must also prepare to serve news and headlines from other sources to their readers.

News sites must improve the attractiveness of their site to bloggers, particularly local bloggers. This could include the use of edited trackbacks, permalinks, links to local bloggers, and aggregation of headlines from related blogs.

Report Methodology

The core of JupiterResearch's products is the perspective and opinion of JupiterResearch's professionals. JupiterResearch's analysts are immersed in the industries they cover through ongoing contact with corporate and technology leaders, daily study of trends and events in the online world, and their collective professional experience. Individual analysts' perspectives are filtered through rigorous collective debate and deliberation, producing research that reflects the combined sensibility of JupiterResearch's entire team.

Analysts' perspectives are enhanced and refined through JupiterResearch-designed market research. JupiterResearch uses many data research tools, including consumer surveys, systematic polling of leading industry executives, comScore Media Metrix measurement data, and a rigorous approach to building market forecasting models. Specialists with JupiterResearch's data research group assist analysts in the technical development of these tools, such as survey design, sample building, data weighting, and data analysis.

This report benefited from a number of specific market research projects, described below.

JupiterResearch/Ipsos-Insight Entertainment and Media Consumer Survey

In September 2005, JupiterResearch designed and fielded a survey to online consumers selected randomly from the Ipsos US online consumer panel. A total of 2,991 individuals responded to the survey. Respondents were asked approximately 26 closed-ended questions about their behaviors, attitudes, and preferences as they relate to consuming media and entertainment online. Respondents received an e-mail invitation to participate in the survey with an attached URL linked to the Web-based survey form. The samples were carefully balanced by a series of demographic and behavioral characteristics to ensure that they were representative of the online population. Demographic weighting variables included age, gender, household income, household education, household type, region, market size, race, and Hispanic ethnicity. Additionally, JupiterResearch took the unconventional step of weighting the data by AOL usage, online tenure, and connection speed (broadband versus dial-up), three key determinants of online behavior. Balancing quotas were determined by an ongoing weekly random digit dialed (RDD) survey of almost 5,000 US households. The survey data are fully applicable to the US online population within a confidence interval of plus or minus three percent.

In this survey effort, JupiterResearch worked with its research partner, Ipsos-Insight, on the technical tasks of survey fielding, sample building, balancing, and data processing. Ipsos-Insight is one of the largest market research companies in the US and maintains a general research panel of 400,000 households. Ipsos-Insight also has access to the Ipsos US Online Panel, which comprises two million Internet users, offering JupiterResearch an easy way to target and survey current online users. Panel-based market research enables researchers to have baseline knowledge of each survey respondent, increase survey participation rates, and permit careful rationing of survey fielding to reduce survey burnout.

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