

Change of the Media Ecosystem and Innovation of Traditional Media and Journalism


Dr. Stefanie Lemcke

 **@stlemcke**

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- 
- 1 Innovation in Media: too late, too little or just making it?
 - 2 Traditional Media: New formats, packaging, pricing
 - 3 New Kids on the Block: There is money in media
 - 4 Outlook for the industry

Newspaper Death Watch



...cycling the Decline of Newspapers and the Rebirth of Journalism

Media Companies in a Race to ...om?

... 28, 2014 - 8:01 am - Posted in [Advertising](#), [BusinessModel](#), [Circulation](#), [NewMedia](#), [OnlineMedia](#), [Solutions](#)

...worthy reporting eye-popping traffic growth and planning to hire teams of reporters, ...ring whether sharing is the new currency of media success.

...give readers enough top-ten lists and animated GIFs they'll do all your

Paywall-Free

Search NDW

Go

Subscribe by RSS or
E-mail



Competitive
Content
distribution
environment

Advertising shift:
print ads decline
categories +
Slow growth

Free content
User generated
Content

Over 120 local and national
newspapers that existed more than
10 years have closed



Parody by GeekWire.com, not an actual Washington Post cover

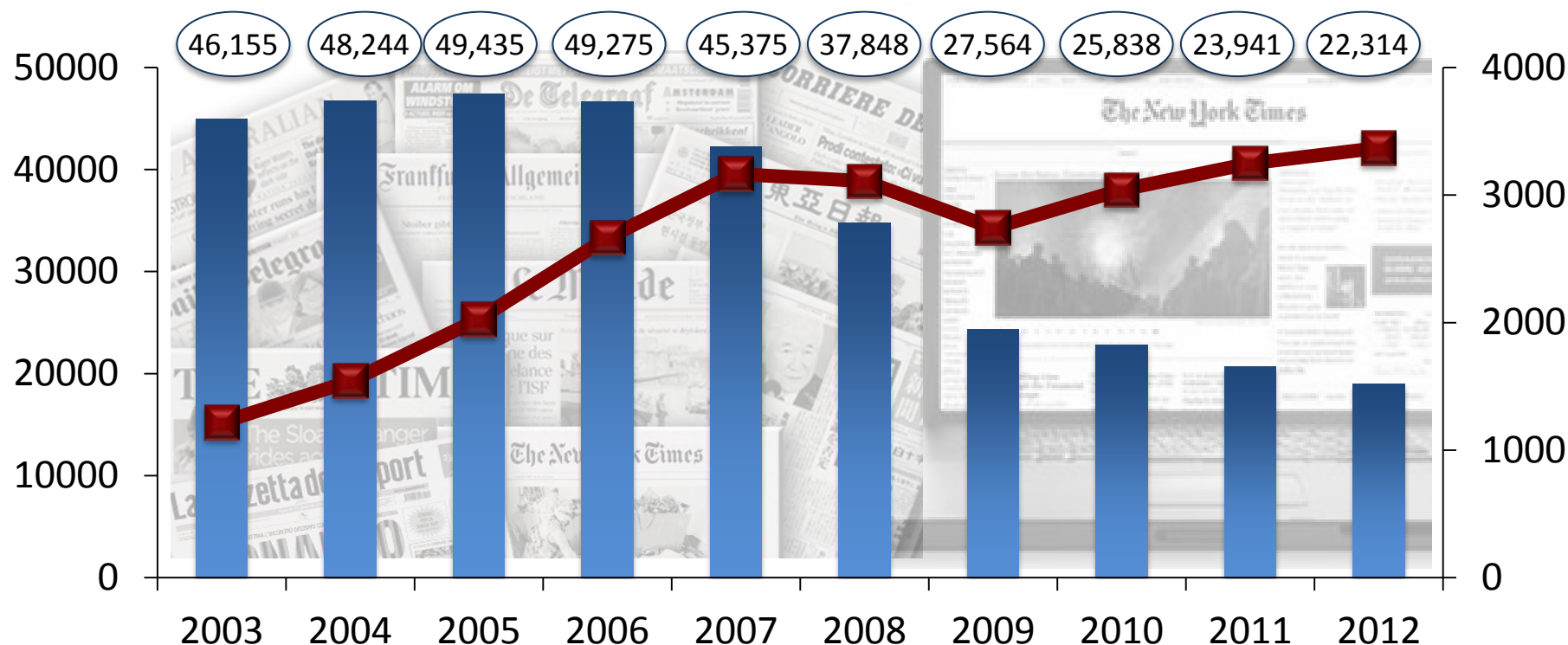
The digital new revenue gap in the US 2012

Print advertising revenues fall, online grows:

Print advertising revenue is now just 45% of what it was in 2006.

The growth in online ad revenue has been slow

Million US\$



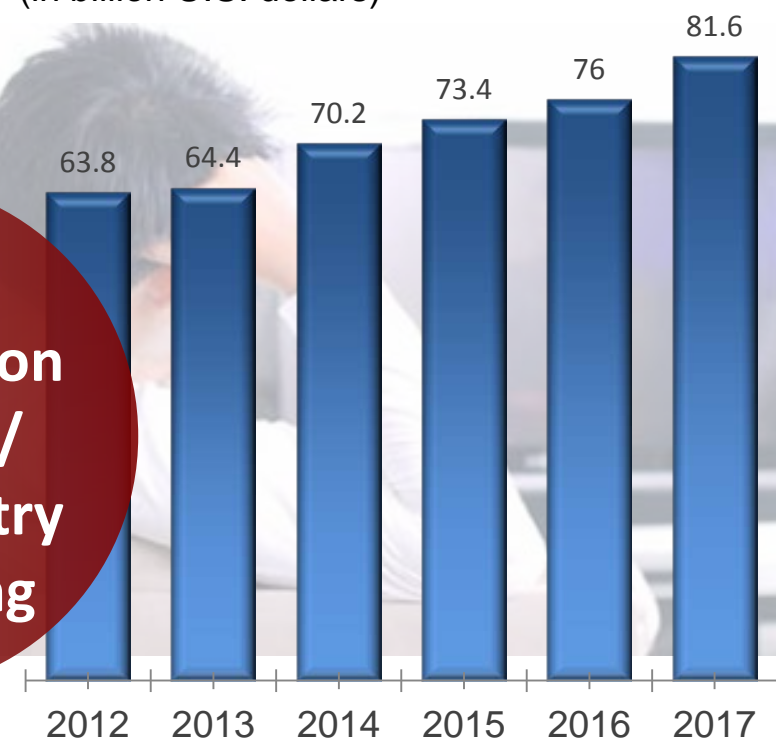
Source: Newspaper Association of America

Revenue of the U.S. newspaper + TV publishing industry from 2012 to 2017 United States

**Revenue of the newspaper publishing industry
in the United States
from 2012 to 2017**
(in billion U.S. dollars)



**TV-advertising revenues
in the United States
from 2012 to 2017**
(in billion U.S. dollars)



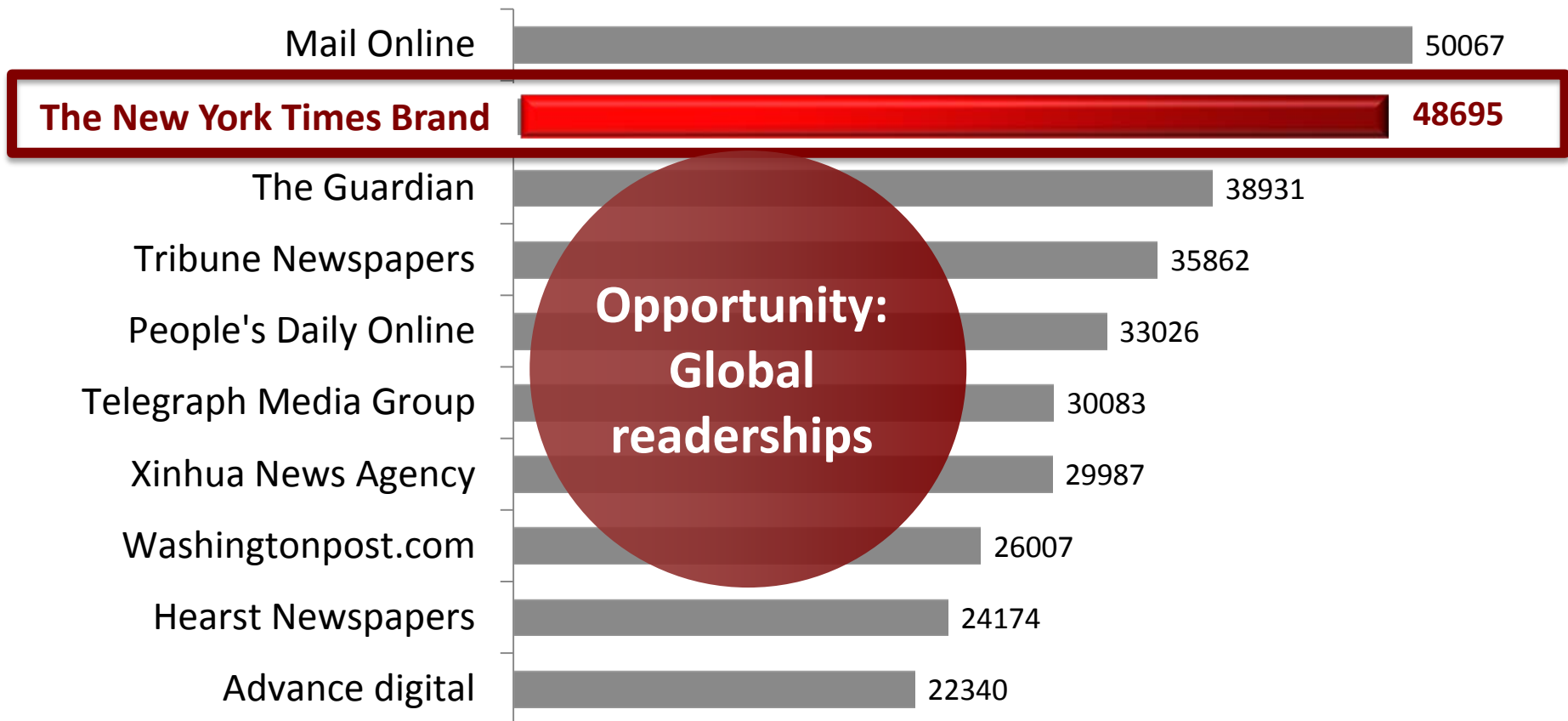
**Despite
fragmentation
television /
video industry
still growing**

Note: further information regarding this statistic, such as comments and footnotes, can be found on page [8](#).

Source: IBISWorld, ibisworld.com

ID 242659

Top 10 Online Newspapers Worldwide Ranked by Unique Visitors (000)



New York Times: Digital reinvention

"All the News
That's Fit to Print

The New York Times

Late Edition

Today, clouds and fog yielding to

NOW
THERE'S AN EASIER
WAY TO STAY
TO THE MINUTE

From The New York Times

700,000 digital
Subscribers

Majority of revenues
Now comes from readers

nytnow

Stories at the speed of life.

Ukraine rushes to
Power and Restore

Lawmakers fire top members of
President Mervyn's cabinet.

Support the new
rallying to the

ars in Seoul

6th April

Save

YOUR DAILY BRIEFING



Good morning.

SUNNY 73° F

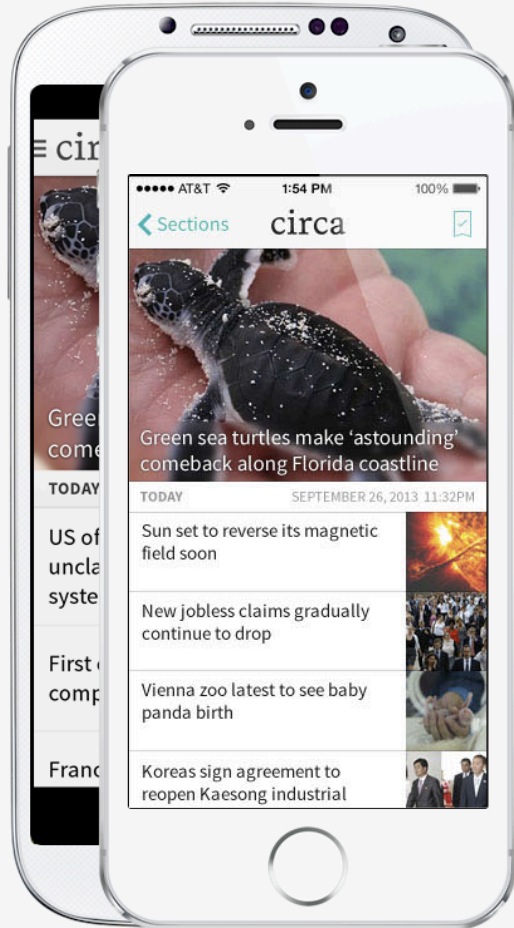
What you need to know to start your
Monday: Obama and Boehner meet at the
White House, turmoil in Ukraine, and the
markets are up.

6th April

GOVERNMENT

Times Premier

Learning from startups: mobile first strategies



NEW 2.0
circa
Save time.
Stay informed.

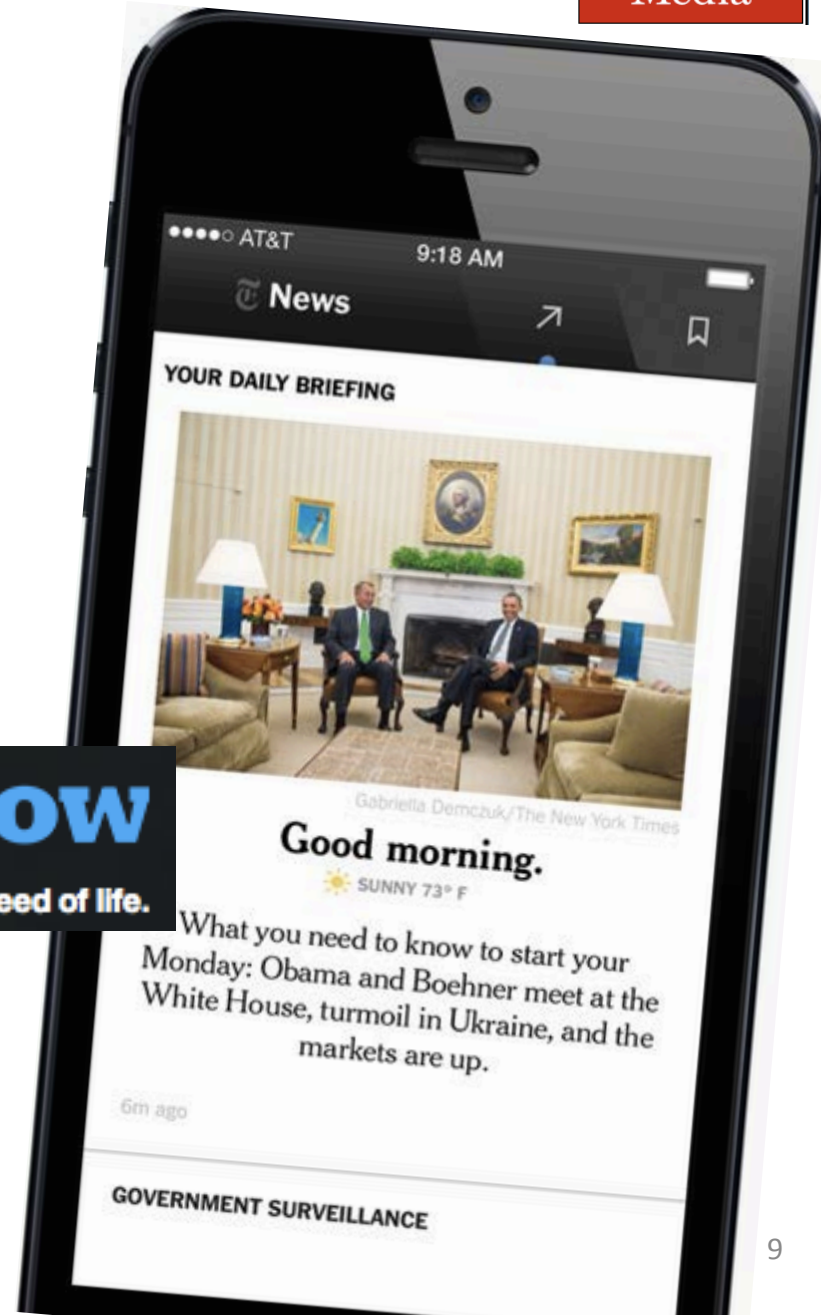
Free in the App Store
and Google Play

Enter your email or phone
number to have a link to Circa
sent directly to your phone.

Email Address or Phone #

nytnow

Stories at the speed of life.



The image is a collage featuring several Wall Street Journal publications on the left and a digital subscription offer on the right. The publications include 'WEEKEND JOURNAL.', 'PERSONAL JOURNAL.', 'MONEY & INVESTING', 'MARKETPLACE', and 'THE WALL STREET JOURNAL.' The digital offer is presented on a website interface for 'The Wall Street Journal Europe'. It includes a 'Country of Residence' dropdown menu set to 'Germany', a phone number '426 1313', and a 'GO' button. A large red starburst graphic with the text 'Digital subscription model' is overlaid on the website. Another red starburst graphic with the text 'Mobile advertising' is overlaid on the right side. A third red starburst graphic with the text 'Video' is overlaid on the bottom center. A blue button with the text 'CONTINUE ≈' is at the bottom right. The offer details are: '€3.15 a week for 12 weeks, then €26.20 a month!'. A small orange box with the text 'WEEKS' is also visible.

Digital subscription model

Mobile advertising

Video

WEEKS

GO

€3.15 a week for 12 weeks, then €26.20 a month!

CONTINUE ≈

New revenues streams: Digital Subscriptions / Paywalls

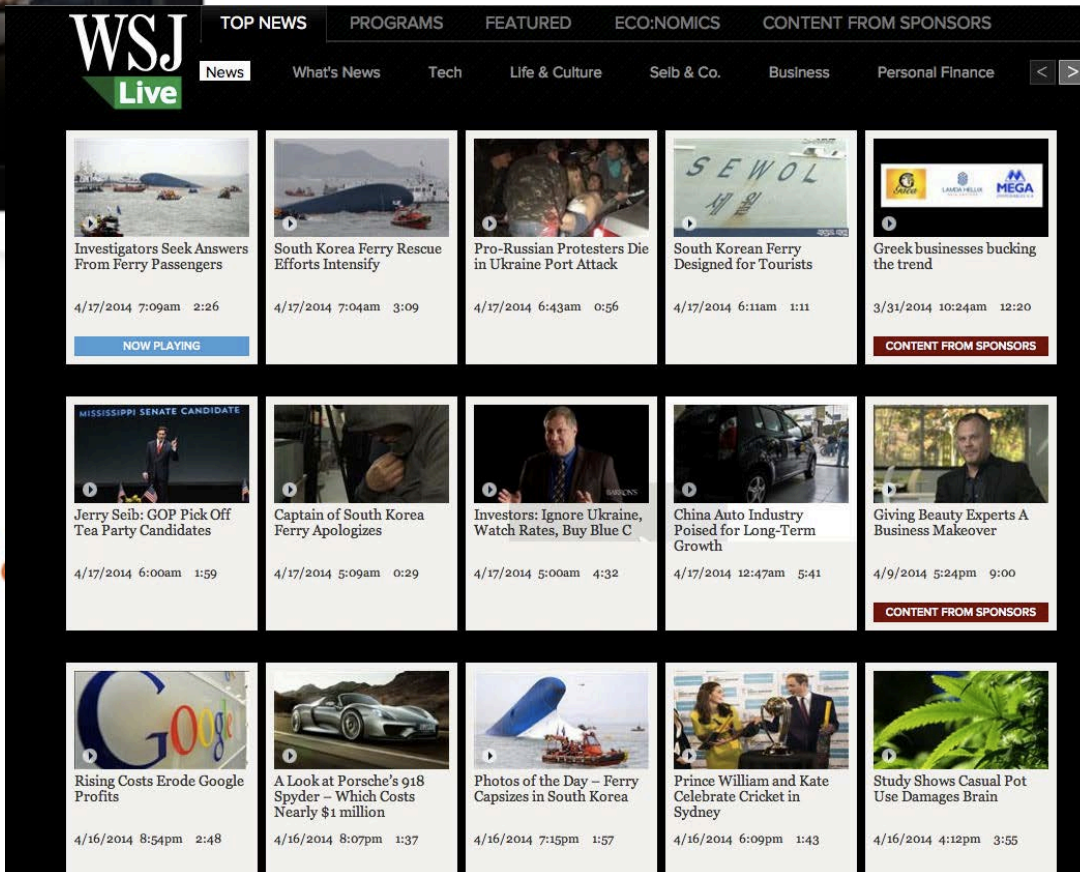
Become a Digital Subscriber starting March 28.

Introducing three great ways to get unlimited access to NYTimes.com and more.



Video as growth motor for new revenues

- LIVE news programming for the Markets, Tech, Opinion
- Access to entire video archive of The Wall Street Journal



New Digital Media Cos

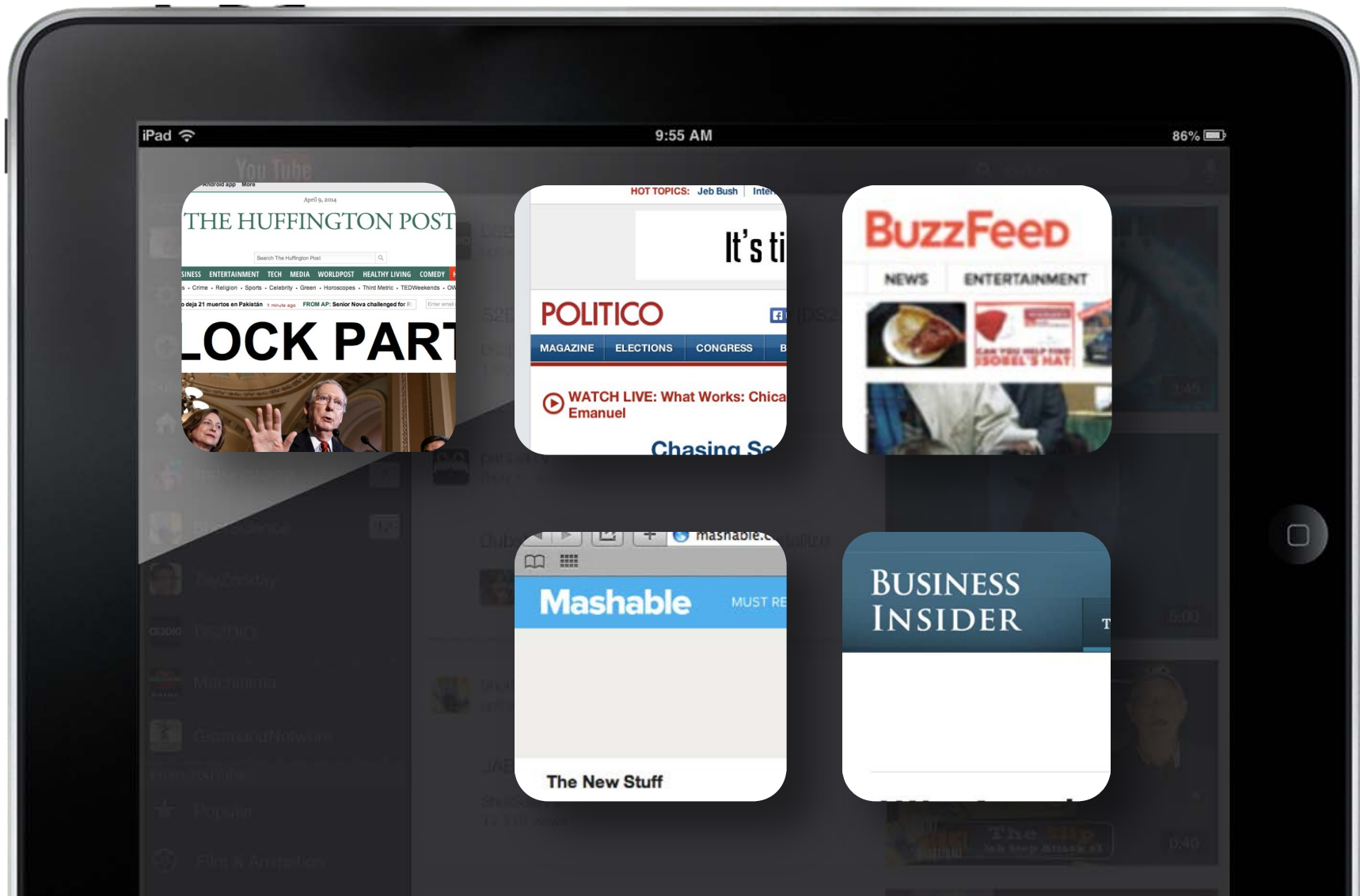
- Huffington Post
- Business Insider
- Politico
- Mashable
- BuzzFeed

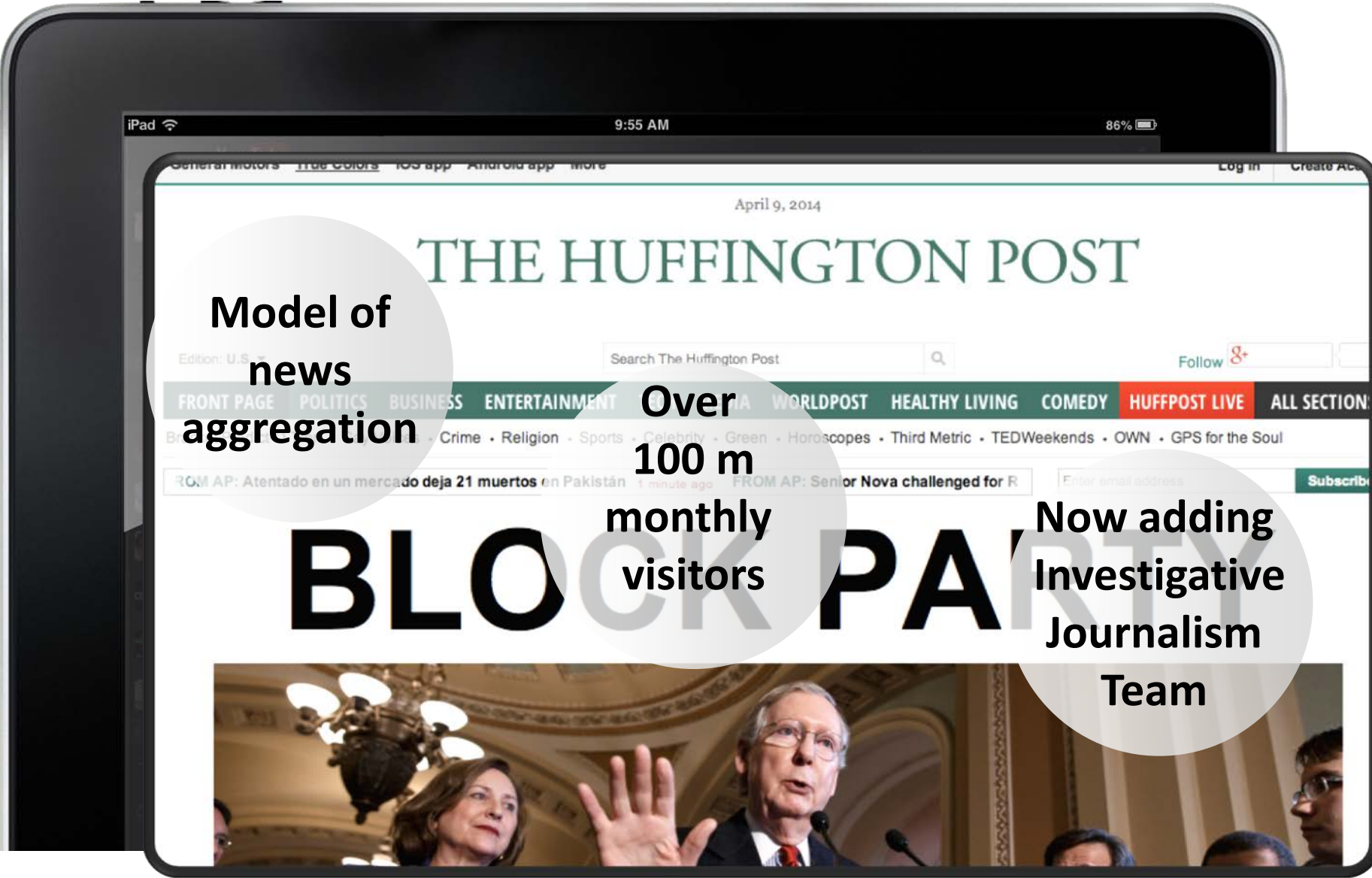
Leading Traditional Innovation

- The Atlantic
- NY Times
- The Guardian



New Kids on the Block





Model of
news
aggregation

Over
100 m
monthly
visitors

Now adding
Investigative
Journalism
Team

US news readership



1 | Yahoo! News

30 - eBizMBA Rank | **125,000,000** - Estimated Unique Monthly Visitors | *29* - Compete Rank | *30* - Quantcast Rank | N/A - Alexa Rank | Updated: April 1, 2014.

The Most Popular News Sites | eBizMBA



2 | HuffingtonPost

41 - eBizMBA Rank | **105,000,000** - Estimated Unique Monthly Visitors | 26 - Compete Rank | 14 - Quantcast Rank | 82 - Alexa Rank | Updated: April 1, 2014.

The Most Popular News Sites | eBizMBA



3 | CNN

63 - eBizMBA Rank | **85,000,000** - Estimated Unique Monthly Visitors | 50 - Compete Rank | 79 - Quantcast Rank | 59 - Alexa Rank | Updated: April 1, 2014.

The Most Popular News Sites | eBizMBA



4 | Google News

80 - eBizMBA Rank | **80,000,000** - Estimated Unique Monthly Visitors | *75* - Compete Rank | *85* - Quantcast Rank | N/A - Alexa Rank | Updated: April 1, 2014.

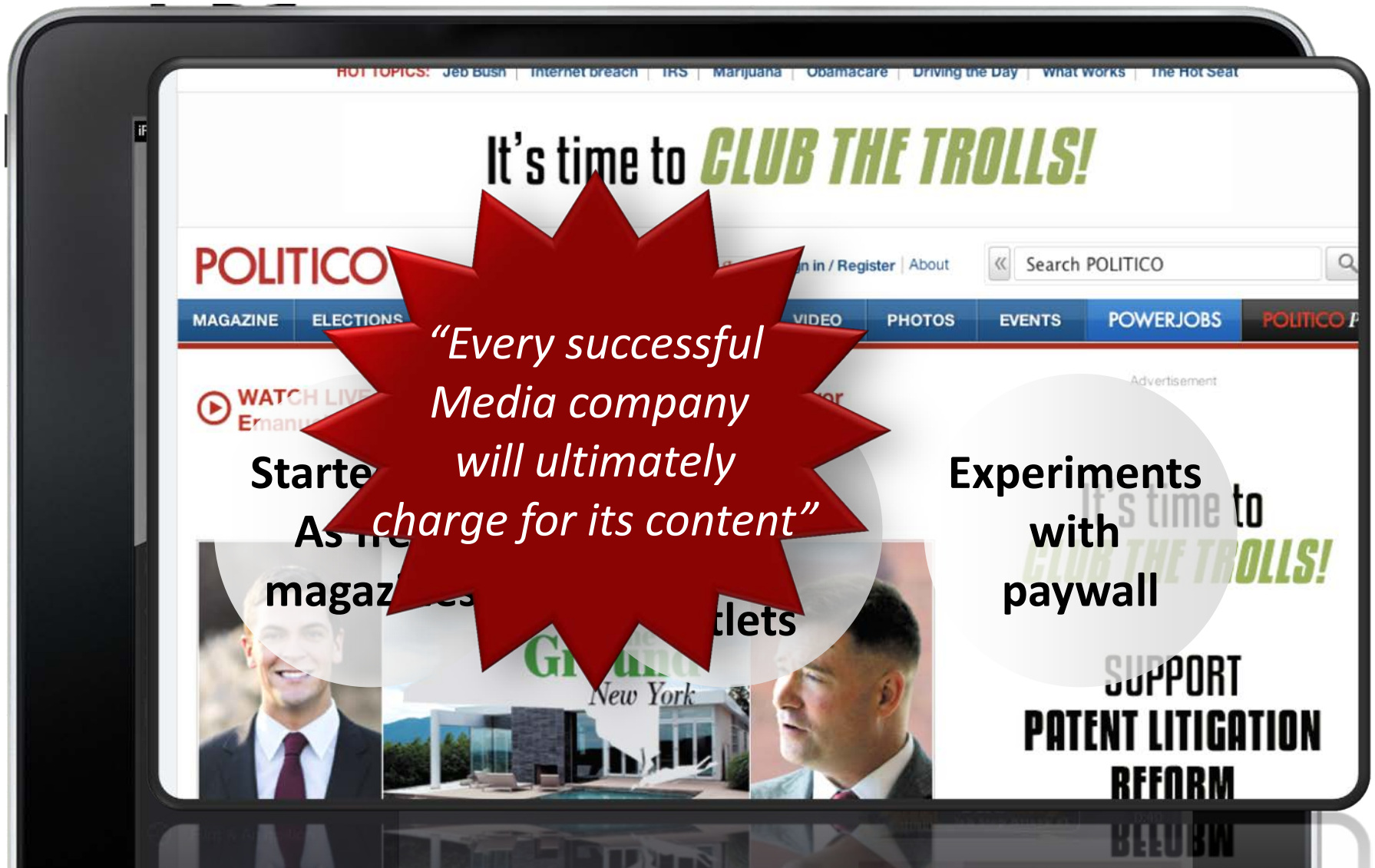
The Most Popular News Sites | eBizMBA



5 | New York Times

83 - eBizMBA Rank | **70,000,000** - Estimated Unique Monthly Visitors | 81 - Compete Rank | 50 - Quantcast Rank | 117 - Alexa Rank | Updated: April 1, 2014.

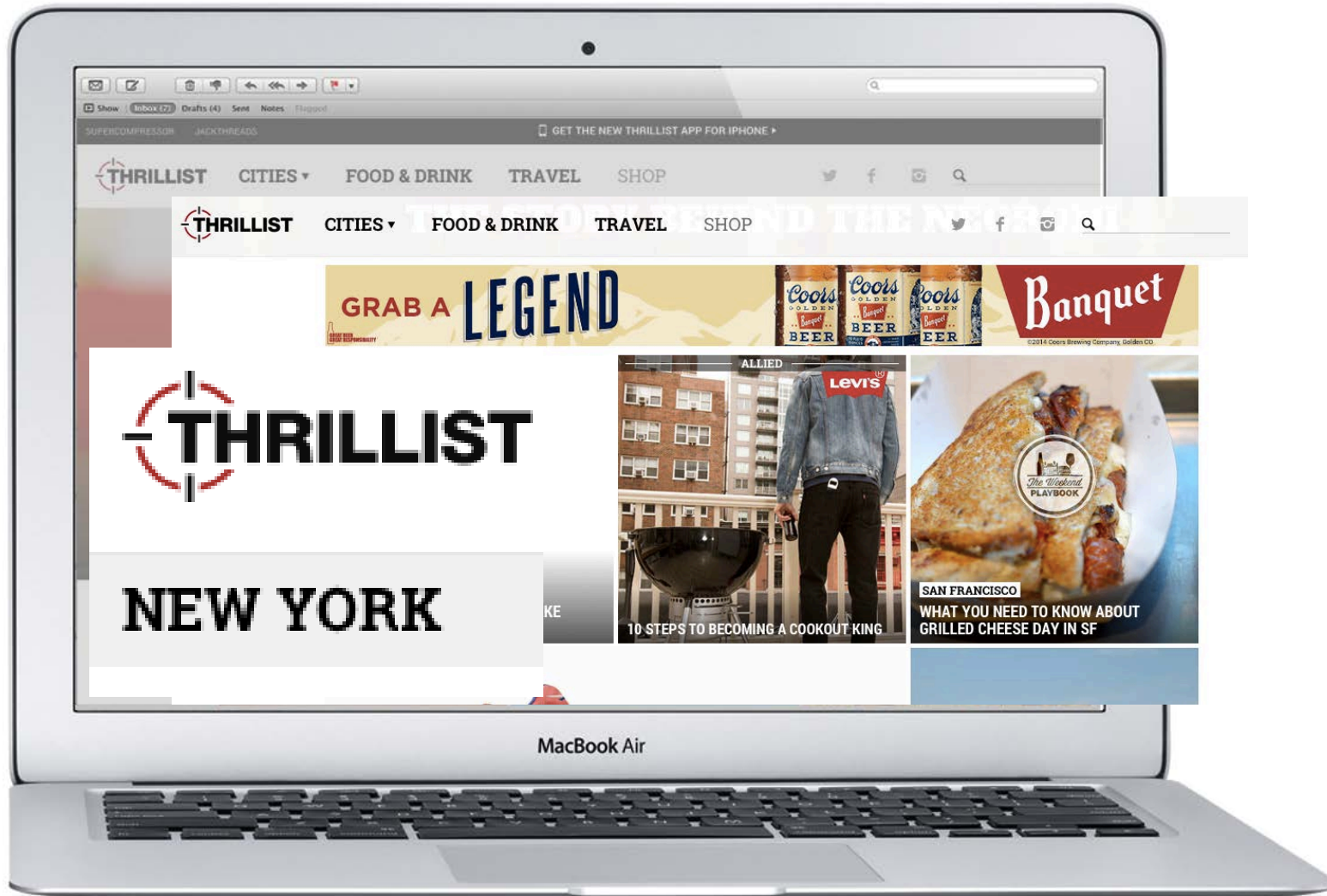
The Most Popular News Sites | eBizMBA



New Kids on the Block: The freshman



New Revenue streams: Content meets (and Merges) Commerce

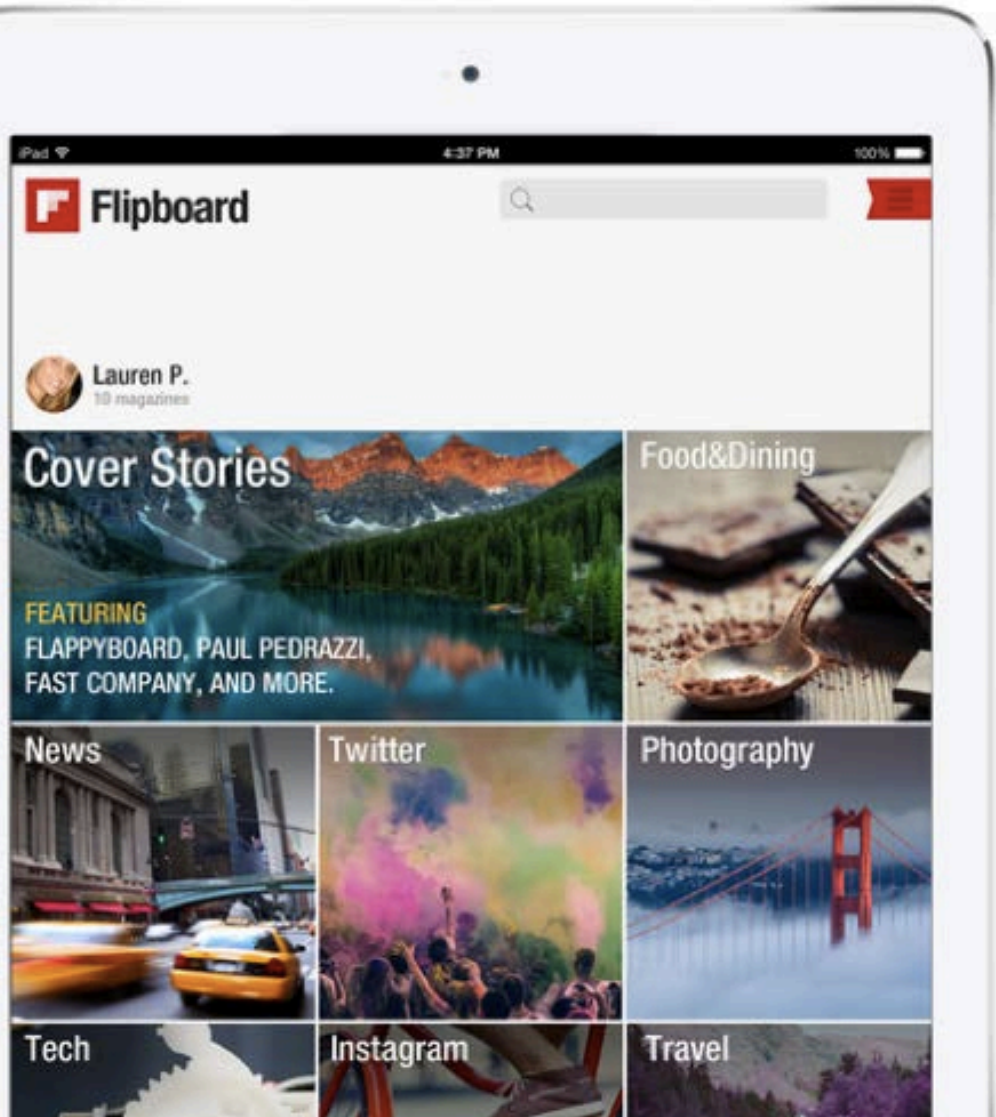


What happens to long form Journalism?



Journalists need to build their own followers and brand

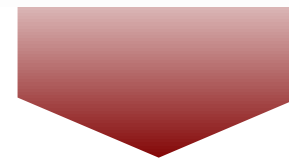
Magazines are going mobile



WIRED



RANDOM HOUSE



**Personalized
magazines**
W9&9S!U62

Innovation in Media :

Transition from Regional Know How to Global Expertise -

Quantum
Media



THE WORLD BANK

Bloomberg





Parody by GeekWire.com, not an actual Washington Post cover

Learnings

1

Digital first: Young audiences have created new user habits – there are huge opportunities in a global access

2

There is money in media: If run like a digital enterprise

3

Businesses Opportunities Online video, mobile and native advertising, curated content




4

News outlets are much needed to curate content and narrate important stories

5

Native advertisement and story telling important for business and newsoutlet alike

Quantum Media

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CONSULTANTS TO MEDIA, ENTERTAINMENT
AND INFORMATION COMPANIES

WHO WE ARE

Quantum Media is a consulting firm with deep expertise in the media, information, and entertainment industries. Since Quantum Media's founding in 1998, our consulting work has spanned every aspect of the media business, from developing an Internet business strategy for a Fortune 500 company to advising a young entrepreneur on launching a niche magazine.

[More about Quantum Media »](#)

WHAT WE DO

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Consumer & B-to-B Marketing :: Branding ::
Product Launches :: Strategic Planning ::
Financial Analysis :: Content Development ::
Interim Management **MORE »**

Clients

Digital Media companies :: Magazines ::
Newspapers & Newsletters :: TV & Cable
companies :: Ad Agencies :: Media Investors ::
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Media Guru



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With Media
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EVENTS

October 08: Media Guru:
Rob Grimshaw,
Managing Director, FT.com

November 20: Media Guru:
Bonita Stewart,
Vice President, Strategic
Partnerships, Americas,
Google

Quantum Media

Dr. Stefanie Lemcke

460 Park Avenue South # 1205

New York, NY 10016

stlemcke@quantummedia.com

twitter



@stlemcke

04 13: Lemcke Featured
at "International Media
Conference Berlin"
04 13: Google at EdTech
Conference on "Building an
Ed Tech Ecosystem"

MORE NEWS »

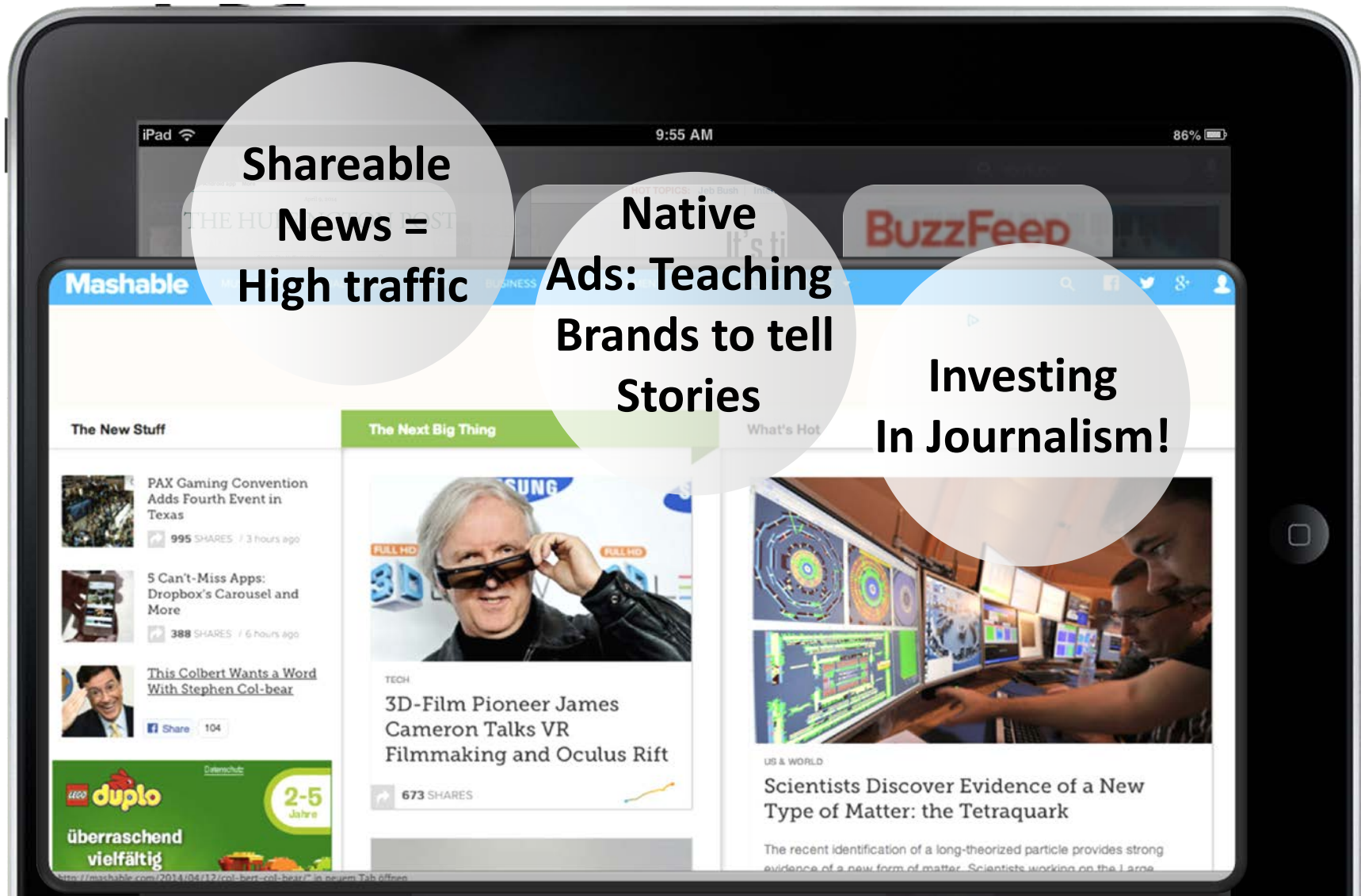
OF INTEREST

Backups

Shareable
News =
High traffic

Native
Ads: Teaching
Brands to tell
Stories

Investing
In Journalism!



Vice new media factory going public?

The image shows a screenshot of the Vice website homepage. The top navigation bar includes the Vice logo and links to various content categories: HOME, VIDEO, NEWS, MUSIC, FASHION, PHOTO, TRAVEL, SPORTS, TECH, FOOD, NSFW, MAGAZINE, and DOS & DON'TS. Below the navigation bar, there are social media sharing buttons for Facebook, Twitter, and Tumblr, along with a Reddit link. The main content area features a large article titled "CULT TO CLASSIFY NY" with a sub-headline "IPA has no policy in place". To the right of the main article is a "FEATURED" section with three video thumbnails: "Fresh Off the Boat: Chengdu - Part 1", "VICE NEWS Last Chance High - Part 1", and "MUNCHIES Callie Speer". At the bottom, there is a "LATEST VIDEOS" section with a video thumbnail titled "DEMAND".

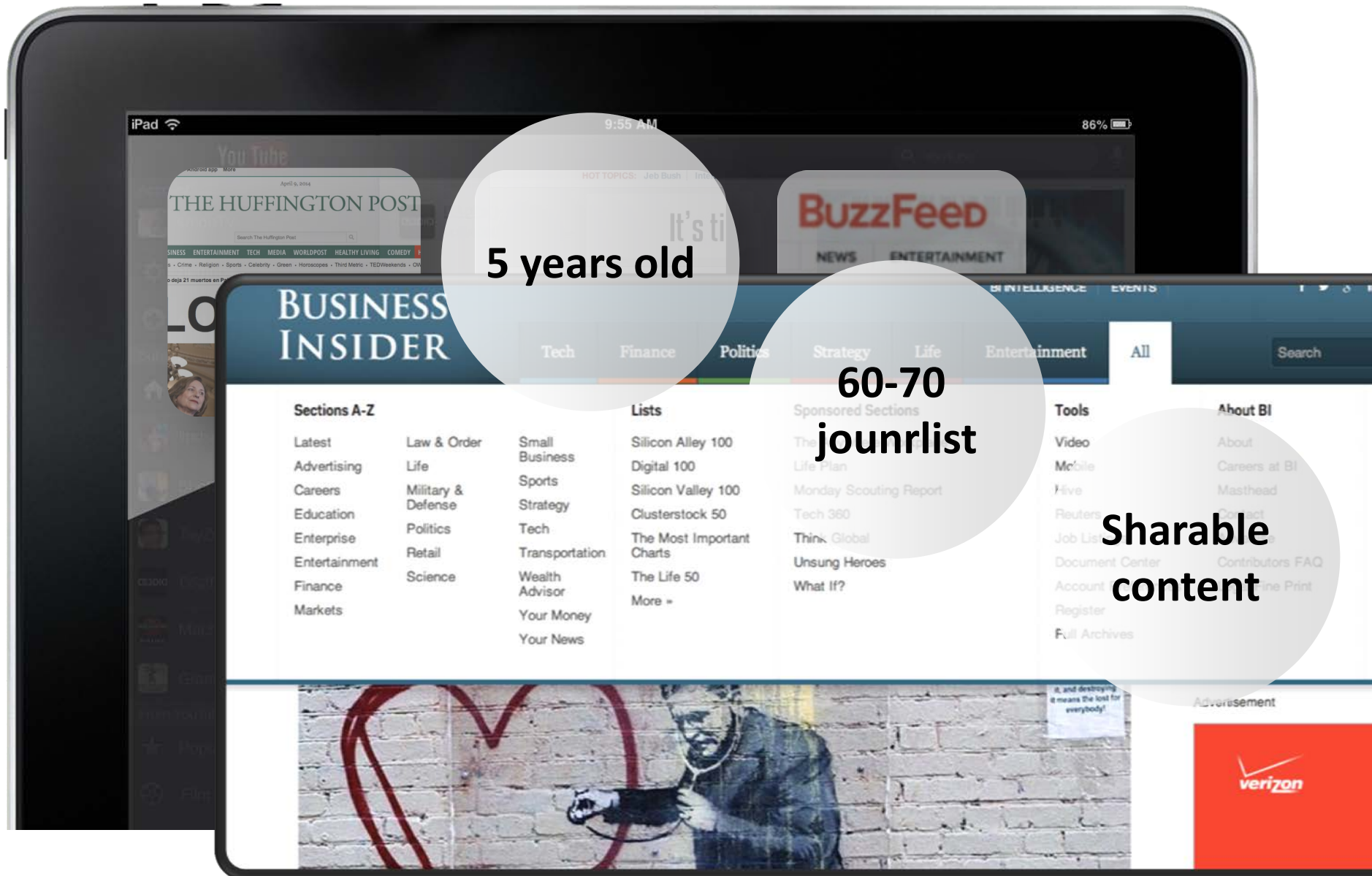
Vice predicted to double revenues to \$ 1 billion by 2016

From free magazine to global video outlet

Murdoch stake 5%

New Kids on the Block: Business Insider

Quantum
Media





Parody by GeekWire.com, not an actual Washington Post cover



As filed with AAM. Subject to audit.

Wall Street Journal Daily Average Circulation

Statement Period End Date	Print Circulation	Digital Replica Circ	Nonreplica				Total Digital Nonreplica	Total Average Circulation
			Restricted Access Website	eReader w/o Advertising	Tablet	Mobile/ Smartphone		
9/30/13	1,356,065	0	704,837	22,736	133,476	56,653	917,702	2,273,767
9/30/12	1,499,204	0	673,410	29,893	60,250	31,041	794,594	2,293,798
9/30/11	1,558,700	0	453,867	41,677	20,185	21,740	537,469	2,096,169

New York Times Daily Average Circulation

Statement Period End Date	Print Circulation	Digital Replica Circ	Nonreplica				Total Digital Nonreplica	Total Average Circulation
			Restricted Access Website	eReader w/o Advertising	Tablet	Mobile/ Smartphone		
9/30/13	676,633	15,043	859,742	50,152	122,774	173,546	1,206,214	1,897,890
9/30/12	717,513	13,089	654,031	61,606	77,392	90,234	883,263	1,613,865
9/30/11	770,586	18,107	235,190	55,982	70,724	0	361,896	1,150,589

Site	Unique audience	Time spent per person	Pageviews per person
NYTimes.com	29,933,000	13:08	12
Wall Street Journal Digital	14,550,000	9:28	11

Top 25 Daily Newspapers

Newspapers by Circulation (September 2012)

	Total Circulation Excluding Branded Editions	Total Branded Editions	Total Circulation	Total Circulation as of Sept. 2011	% Change
Wall Street Journal	2,293,798	-	2,293,798	2,096,169	9.4%
USA Today	1,713,833	-	1,713,833	1,784,242	-3.9
New York Times	1,613,865	-	1,613,865	1,150,589	40.3
New York Times	1,613,865	-	1,613,865	1,150,589	40,3
San Jose Mercury News	161,966	362,933	524,933	521,966	0.5
New York Post	522,868	-	522,868	512,067	2.1
Washington Post	462,228	-	462,228	507,465	-8.9
Chicago Sun-Times	263,292	169,163	432,455	389,352	11.1
Denver Post	402,564	10,105	412,669	353,115	16.9
Chicago Tribune	411,960	-	411,960	425,370	-3.2
Dallas Morning News	257,133	152,997	410,130	409,642	0.1
Newsday (N.Y.)	392,989	-	392,989	404,542	-2.9
Houston Chronicle	325,814	-	325,814	369,710	-11.9
Tampa Bay Times*	231,944	81,059	313,003	240,024	30.4
Newark Star-Ledger	311,904	-	311,904	210,586	48.1
Minneapolis Star Tribune	300,277	-	300,277	298,147	0.7
Philadelphia Inquirer	236,953	59,474	296,427	331,132	-10.5
Cleveland Plain Dealer	293,139	-	293,139	243,299	20.5
Orange County Register	175,851	109,237	285,088	270,809	5.3
Arizona Republic	275,622	-	275,622	292,838	-5.9
Las Vegas Review-Journal	142,775	109,399	252,174	213,078	18.3
Boston Globe	230,351	-	230,351	205,939	11.9
Oregonian	226,406	2,193	228,599	242,784	-5.8
Honolulu Star-Advertiser	155,654	69,319	224,973	178,082	26.3

Source: Alliance for Audited Media publishers' statements for the 26 weeks ending September. M-F combined averages of total circulation.

Print advertising revenue is now just 45% of what it was in 2006. The growth in online ad revenue has been slow.

Print vs. Online Ad Revenue

In Millions of Dollars

	Print	Online	Total
2003	\$44,939	\$1,216	\$46,155
2004	46,703	1,541	48,244
2005	47,408	2,027	49,435
2006	46,611	2,664	49,275
2007	42,209	3,166	45,375
2008			37,848
2009			27,564
2010			25,838
2011			23,941
2012			22,314

Inhalt / Zahlen = Folie 7
Kommt hier neues?

Source: Newspaper Association of America
PEW RESEARCH CENTER
2013 STATE OF THE NEWS MEDIA