



The Role of Print in the Digital News World

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1. Introduction

There are few stranger professional experiences in media than working in the print news industry in India. I write this, in 2018, fully aware of the fact that the media industry around the world has gone through a period of unprecedented change around the world for a decade or more, and that wondering about the future of print is hardly a novel idea. Yet, I would contend that in no other context is there a sharper contrast between the bare economics of the industry — often presented in hugely positive numbers — and the caution expressed by those who work in the industry as to its future.

The continued growth of print newspapers in India was enough of an economic anomaly, globally, to merit an explainer in 2016 by *The Economist* which noted that in the previous year, the country's newspaper industry grew by 8 per cent¹. In 2017, figures released by the country's Audit Bureau of Circulation noted thereafter, that over the last decade newspaper circulation has grown from 39.1 million copies in 2006 to 62.8 million in 2016 — a 60% increase for which there is no global parallel². Much of this growth is driven by regional language dailies whose increase in circulation is in turn fuelled by a rise in income and literacy rates over the last two decades.

For English language dailies, such as *The Hindu*, the publication for which I work, the prognosis is hardly bleak and other surveys such as the Indian Readership Survey (IRS) suggest that they have seen a total growth in circulation of about 10 per cent over the last three years³. There is, to some degree, a debate about the methodology behind arriving at these numbers and their validity. What is more pertinent to note however, is that you'd be hard pressed to find anybody who works at an English language daily who does not believe that a big part of the future will be in digital and mobile. As of 2017, India has over 500 million smartphone users and that number is expected to rise to 700 million by 2020. According to a survey by the Internet and Mobile Association of India, smartphone users on pre paid plans, a significant majority, spend

¹A.A.K. (2016, February 22) Why India's newspaper business is booming. Retrieved from www.economist.com

² Tharoor, Shashi, 2017, May 22) The last bastion of a profitable press. Retrieved from www.gulfnews.com

³ ET Bureau (2018, January 22) Newspapers add 110mn new readers in 3 years: IRS 2017. Retrieved from www.economictimes.indiatimes.com

72 percent of time on their phones accessing content online. Combine that with statistics that say India will be the youngest country in the world by 2020, with an average age of 29, and you're looking at a society that will be going digital at an unprecedented rate.

Side by side, is a huge legacy print infrastructure that is often compelled to react to market forces while simultaneously going through periods of self reflection. This dichotomy is perhaps best reflected in comments made by Bobby Ghosh, the former editor of one of India's biggest national dailies, *Hindustan Times*, at a conference organised by the Italian Daily *La Stampa* in 2017 to debate the future of newspapers. When asked, as part of a panel, if he believed if there is a future for print, Ghosh said that *Hindustan Times* not only believes that there is a future for print but has backed it up by launching a new print edition in Pune, a city in Western India, with an initial print run of 100,000 copies. In the same answer, however, he reflects that the form of the paper has to change.

"The paper cannot look, feel and read like it has for the past 75 years. People don't read news like that anymore.. Today when I wake up, I check my phone, my Twitter and my email. It could be a full hour before I check the newspaper and nothing in that paper is likely to be fresh. How do we present something that is fresh? What is the excuse for the reader to pick up the newspaper?"⁴

With some variations, these particular predicaments characterise many of the discussions taking place in legacy print organisations in India today, including *The Hindu*, which, in 2015, launched a new print edition in Mumbai. There is incentive to expand circulation to new markets to pull in more advertising and with it, the competing pressure of having to distinguish a print product from several others in a saturated market. Additionally, there is the constant need to develop the newspaper's digital presence on various platforms.

There has been a fair amount of work already, including papers published by the Reuters Institute for the Study of Journalism, on Indian Newspaper's Digital Transition and the ways in which some organisation have attempted to restructure their newsrooms and editorial work flows to pursue a digital first news strategy. Less though, has been written about the role of the newspaper itself in this digital transition and how it can be positioned in the media set of news companies that are already delivering news through a variety of different channels. The paper has to change, as Ghosh and many other editors acknowledge, but what should the newspaper for the digital age look like?

⁴(2017, June 22) The Future of Newspapers, Panel 1 - Editor's view. Retrieved from www.youtube.com

1.2 Discussions around print today

Before moving to the question of the role of print in the digital age it's worth looking at some numbers relating to the print industry today. The World Press Trends 2017 report, an annual survey of 70 countries by the World Association of Newspapers and News Publishers (WAN INFRA), estimates that print product's share of total revenues for newspaper companies was 91.6 per cent.⁵ The other big headline from the report was that reader revenue was overtaking advertiser revenue. Though this is offset by the fact that revenues from advertising had already been on a downward trend for several years the overall message focused on building loyal audiences who would then be willing to pay for print and digital subscriptions.

2017 also saw the publication of some important academic research on the ways in which audiences engage with print. In various conferences around the world in 2017, WAN INFRA also presented a report titled *Print Online Performance Gap*, an elaboration of an earlier US based study by H Iris Chyi and Ori Tenenboim that studied 51 metropolitan newspapers, leaving out some of the bigger national players like *The Washington Post* and *The New York Times*. The study found that though total circulation had dropped for these newspapers over a period from 2007-2015, the print version of the product still reached far more readers than the digital offering. The fall in circulation, in other words, was not being offset by people opting to read the online version of the paper. The paper thus calls for a rethink about the transition from print to online and calls on publishers to drop the death narrative for print.

In February 2017, a study by Dr Neil Thurman from The City University of London, attempted to calculate how much audience attention newspapers' print, PC and mobile version attract.

"The results show that, of the time spent with 11 UK national newspaper brands by their British audiences, 88.5 per cent still comes via their print editions, 7.49 per cent via mobiles, and just 4 per cent via PCs... For publishers, this research calls into question the transition from print to online, showing how "dead-tree" editions are their most important platform.⁶ Dr Thurman points out however, that the circulation of print editions is in steep decline and that "unless the qualities that make newsprint so much more engaging than online journalism can be harnessed to propel a reading resurgence, newspapers decline will continue".

⁵ World Press Trends 2017 - WAN INFRA

⁶ Thurman, Neil (2017, February 1), *Newspaper Consumption in the Mobile Age*

Markets and situations vary of course — India, as already mentioned, has not seen a sharp drop in print circulation — but the point that both papers make in terms of the print being a more engaging medium are still relevant. As a business proposition, the issue of reinventing print for profit was highlighted by the Innovation Media Consulting Group in 2015 in an annual report compiled for WAN IFRA⁷. The key to doing that, according to the report, is to ask whether the editorial model that once sustained print is still relevant. “If people already have access to news digitally then what should be the day after paper?” it asks.

In markets where there is not a steep decline in print circulations, it says staying flat is the new up — a phrase that quite accurately reflects the market situation of English language dailies in India which have held a fairly steady position for years. The challenge then, according to the report, is to reinvent print so that circulation stays flat, or goes down marginally, but revenues go up. Print, it says, should move toward being a premium proposition and companies should charge more for the product, preferably in a multiple of 5.

1.3 Context in India

Though India is one of the only large markets where print is growing it is still susceptible to global trends in terms of the drop in advertising revenues. Digital advertising numbers are likely to go up by 30% in 2018 to Rs12,337 crore as Indians spend more time on mobile devices, according to media agency GroupM’s annual forecast released in February⁸. The differential between print and digital advertising is likely to even out by the year 2021 and while that still means a fairly healthy share for print, it will translate to heavy losses for major legacy media companies where print revenues are almost completely driven by advertising. Moving to a business model more centered on reader revenue is imperative but at the same time, hugely complicated. Only one leading newspaper, *Business Standard*, has experimented with an online paywall and *The Hindu* is the only national daily to have adopted a strategy in which the print product is priced up by a significant differential.

The Hindu’s experiment with pricing will form one of the case studies for this paper because it directly addresses a central question — what is the formula for restoring the value of the print product in a digital news age. Moving beyond India, the paper will also pan out to look at case

⁷ Innovation in Newspapers World Report 2015 - Innovation Media Consulting Group

⁸ Tandon, Suneera (2018, February 2018), Indians still love their morning newspapers, but advertisers would rather catch them online. Retrieved from www.quartz.com

studies from around the world of newspaper that are reinventing print in innovative ways and see if this could provide a roadmap of sorts for English language newspapers in India.

“Newspapers do have unique attributes,” writes *Financial Times* CEO John Ridding in an excerpt from a recent collection of essays about the future of media.⁹ “At a time of limitless information and limited time, they provide the valuable service of selection and judgment for readers and an informed hierarchy of importance. They also enable the satisfaction of completion, a contrast with the wormholes of the web.” In the Indian context, as companies plan for a future where revenues from print will fall, it may be time to realise the full potential of the paper product — not as the traditional multi section paper that provides old news but as a curated offering that plays to the strengths of the medium that Ridding outlines here.

The death of print has been foretold many times. And while it has largely proven to be resilient, there is no doubt that circulation figures will continue to fall and that print’s role in the media world will continue to change. *New York Times* CEO Mark Thompson was the latest to put a timeline on print when he remarked recently that the print newspaper as we know it probably had another ten years.¹⁰ Whatever the eventual number or time period, I believe that there is one last reinvention of the print product, where it may change in both form and frequency, but still form an important, and profitable, part of the news set. This paper looks ahead to that process and is intended as a small beginning to that conversation in the Indian context.

⁹ Ridding, John, (2017, January 12) Who wants today’s newspapers. FT Chief John Ridding on why print still has a future. Retrieved from www.thedrum.com

¹⁰ Eil, Kellie, (2018, February 12), New York Times CEO: Print Journalism has maybe another 10 years. Retrieved from www.cnbc.com

Chapter 2: Digital Born and The Business of News After Advertising

To start this chapter I would like to refer again to the World Press Trends report released by WAN-IFRA at Durban last year and one of its headline figures - that the print product's share of total revenues for newspaper companies was 91.6 percent. Is this evidence that print is still healthy or, if posited another way, is it evidence rather of the failure of news companies to monetise their digital products? The former view would place print in opposition to digital in the larger media set and the latter view is an acknowledgement that the fate of both are perhaps more inextricably linked than people realise.

I would like to examine this proposition for the Indian context from the prism of recent debates around the business of news after advertising. For several reasons, though mostly because of the fairly dramatic numbers involved, it is impossible to talk about media in India without acknowledging the dominant position that advertising plays in its growth trajectory. Starting with digital media first I rely on work and interviews already done in an excellent report published by the Reuters Institute for the Study of Journalism on Digital Journalism Startups in India published in 2016.

Outlining the business opportunities in the Indian market that both digital media start-ups and legacy media expanding their digital operations were pursuing, the paper noted that 'at an estimated INR 62.5 billion (about \$975 million), digital advertising in India grew by a factor of ten between 2008 and 2015 and is expected to continue to grow by 20–30 percent a year in the immediate future.'¹¹ As is the case across the world, the paper notes, Google and Facebook dominate digital advertising. In 2014, search and social media accounted for an estimated 48 percent of all digital advertising in India, leaving everybody else to compete for the remaining half.

Despite this considerable challenge, there is clearly optimism of the potential for expansion that the Indian market represents. Among others, the paper focuses on two for-profit news start-ups - *Scroll* and *The Quint*. Of *The Quint*, it notes that *BuzzFeed*, *Mashable*, *Vice*, and *Vox* are amongst

¹¹ Sen and Nielsen (2016), Digital Journalism Startups in India. Reuters Institute for The Study of Journalism

the digital start-ups that have influenced the site's vision and strategy. The distribution strategy is social and mobile first and the business strategy is premised on rapid growth in audience reach and volume and built in large part around digital advertising and planned partnerships with television.

Of *Scroll*, the paper notes, the business is based on the idea that there is an up-market audience in India that *Scroll* can serve and that will in turn be attractive to advertisers who will increasingly turn to digital media as internet use and smartphone ownership continues to increase. The authors interview *Scroll's* CEO Samir Patil, who says that internet use in India has now reached a scale, and shows a growth rate, where digital only media have become an attractive proposition. In particular, Patil points to the potential of native advertising, sponsored content and possible forays into content-led e-commerce as the way forward.

Scroll and *The Quint*, in this context, are particularly interesting case studies — and here I speak anecdotally here from my familiarity with developments in Indian media as a reporter at the time for India Today, India's largest selling news magazine. I believe that the launches of both sites, in 2014 and early 2015 respectively, represented a particularly high period of optimism for digital born media and an anxiety among more traditional media houses to respond with digital first strategies, or at least, an increased emphasis delivering news for their online platforms.

In a significant change to the business model, that was not previously outlined in the Reuters Institute paper at least, *Scroll* introduced a subscription model, in March earlier this year. The offerings for subscribers are still being developed, but for a start they have access to all sites published in the past and to an ad free site.¹² They join some of the first movers in the digital news space who are starting to experiment with paywalls, including the independent news portal *NewsLaundry*, the business daily *Business Standard* and a newer subscription-only business news website *The Ken*. Most legacy news media companies remain sceptical but there are signs of a quiet, albeit slow, change taking place in the digital news market.¹³

¹² Reddy, C Rammanohar (2018, March 25), The Readers' Editor writes: To be financially viable, publications need subscriptions as well as ads. Retrieved from www.scroll.in

¹³ Bansal, Shuchi (2016, October 27), The big digital paywall question. Retrieved from www.livemint.com

2.1: Global perspectives on digital advertising

A recent panel discussion at the 2018 International Journalism Festival held in Perugia, Italy, invited different perspectives on the business of news beyond advertising from industry leaders as diverse as the *Financial Times*, *Huffington Post* and *Gizmodo*. Setting out the premise of the debate at hand, Raju Narisetti, then the CEO of *Gizmodo* and a former Managing Editor of the *Wall Street Journal* Digital Network, pointed out that news companies looked at revenues coming in through two streams - subscription and advertising.

“When we all decided to go digital, 15 or 16 years ago and over the past decade, most publishers very conveniently abandoned reader revenue and thought they would make money on advertising. They’ll scale and things will be great but as you all know, things aren’t great”.¹⁴

Academic research has also attempted to explain the thinking of news organisations in the digital age, even when confronted with the fact that they were now operating in a market with far more choice in terms of news sources. Early on in the 1990s for instance, advertising agencies imagined that digital display advertising — with its potential for reach and offering features like interactivity — might reach a CPM of \$80 (cost per mil, the cost per thousand views).¹⁵ Yet, as growth in choices for media outstrips demand that is not how things evolved. Figures from the US in 2011 still give a sense of how different the rates for digital advertising are from offline advertising. That year, industry observers estimated a \$60 average CPMs for print newspapers, \$23 for primetime network television, between \$3.50 and \$2.50 for generic online advertising, \$0.75 for mobile display advertising, and just \$0.56 per thousand impressions on social networking sites.¹⁶

These concerns around monetising audience reach and numbers are reflected in recent figures released about digital born brands that have most aggressively chased large audiences across different platforms. Among those at that are struggling to meet revenue targets and investor expectations are *Buzzfeed*, *Vice* and *Mashable*. All the while as Google and Facebook tighten their

¹⁴ Panel discussion on the Business of News Beyond Advertising, International Journalism Festival 2018. Retrieved from www.youtube.com

¹⁵ Turow, Joseph. 2011. *The Daily You : How the New Advertising Industry Is Defining Your Identity and Your Worth*. New Haven, Conn; London: Yale University Press

¹⁶ Rasmus Kleis Nielsen. 2018. *The Changing Economic Contexts of Journalism*, ICA Handbook of Journalism, Routledge

grip on the online ad market.¹⁷ These troubles extend to other parts of the world with shares in the Axel Springer group, one of Europe's biggest conglomerates, fell by 8 percent earlier this year. ¹⁸ Springer owns Germany's best-selling newspaper, *Bild*, but has worked in recent years to reinvent itself as a digital media company, with the acquisition of companies like Business Insider. These are serious developments and all point, conclusively, to the fact that the 'pure player' model, based on building reader volume and driven by advertising revenue, is not viable.

For those brands who have aggressively chased audiences across countries and platforms, and have neither subscribers, members or offline revenue to sustain them, the challenges of building a profitable advertising-supported news business is particularly pronounced. However the challenge is not unique to them. *The Guardian*, the *Mail Online*, and other newspaper websites face the same pressures on their advertising revenues. Some legacy publishers acknowledge that their digital operations are still not profitable, and many domestic digital-born news media too continue to struggle with sustainability.¹⁹

Writing about the decline of newspaper advertising in 2016, an article in *The Atlantic* speculated about the future with a poignant thought. 'This future of the newspaper business would serve as a corrective, returning the industry to its distant past',²⁰ it said. We can conclude now and argue rather strongly that that sentiment should apply across the news publishing business, whether newspaper, magazine or digital.

"Technology, virtual reality, gadgets, widgets, events, ecommerce, is really not going to be the salvation of publishing. We need to get back to reader revenue," said Juan Señor, president of Innovation Media Consulting, speaking at the Digital Innovators Summit held in Berlin earlier this year while releasing the Innovation in Magazine Media word report for 2018. ²¹

The report, a survey for FIPP - a global trade association for the media content industry (?), says, in no uncertain terms that the only way to find redemption from the 'original sin' of giving content out for free, is to start charging readers. A good benchmark, it says, is to aim for

¹⁷ Sharma, Amol and Lukas I. Alpert (2017, November 16) BuzzFeed Set to Miss Revenue Target, Signaling Turbulence in Media. Retrieved from www.wsj.com

¹⁸ Buck, Tobias (2018, March 18) Axel Springer shares fall as analysts question outlook. Retrieved from www.ft.com

¹⁹ Rasmus Kleis Nielsen (2017, December 5) Is the digital content bubble about to burst? For some of the publishers chasing the broadest scale maybe. Retrieved from www.niemenlab.com

²⁰ Thompson, Derek (2016, November 3), The Print Apocalypse of American Newspapers. Retrieved from www.theatlantic.com

²¹ Gavin, Jamie (2018, May 10), Reader Revenue, not new technology, will be the salvation of journalism. Retrieved from www.fipp.com

40 percent of reader revenue, acknowledging at the same time, that there are various approaches to achieving this.²²

A whole section of the report also outlines the need to get away from distributed content and get rid of the idea that Facebook or other platforms is going to deliver the audiences that will lead to increased revenue. Publishers simply do not make enough money on Facebook, says Greg Piechota, a researcher at Harvard University and the Reuters Institute for The Study of Journalism.²³ Piechota found that Facebook contributed just 7 percent to the digital income of WAN-IFRA members and that even leading publishers who have embraced the idea of cross platform publishing and built vibrant communities on Facebook have not been able to monetise that engagement.

Recent research also suggests that this may be a particularly good time to try out subscription models. One recent study found that people who subscribe to a print newspaper and younger people (who are more likely to being accustomed to paying for digital content and services like apps, games, music, or video) are significantly more likely to pay for online news.²⁴

2.2 Moving beyond advertising

It has been noted that news media in India face many of the same challenges as elsewhere in terms of breaking even on the basis of digital advertising, but matters are further complicated by a long tradition of very low print cover prices heavily subsidised by advertising.²⁵ The dominance of advertising in the print media landscape is perhaps best illustrated by a statement made by a director of the *Times of India*, India's largest selling English daily, in a 2012 profile by the *New Yorker* - "We are not in the newspaper business, we are in the advertising business", he said.²⁶ Adding that "if ninety percent of your revenues come from advertising, then you are in the advertising business".

²² Wilpers and Senor (edited), *Innovation in Magazine Media 2018-2019 World Report*, A survey by Innovation Media Consulting for FIPP - The Network for Global Media

²³ 'It's finally time to end the facebook addiction'. From the *Innovation in Magazine Media 2018-2019 World Report*

²⁴ Fletcher, Richard, and Rasmus Kleis Nielsen. 2016. "Paying for Online News." *Digital Journalism* 0 (0): 1–19. <https://doi.org/10.1080/21670811.2016.1246373>.

²⁵ Rasmus Kleis Nielsen. 2018. *The Changing Economic Contexts of Journalism*, ICA Handbook of Journalism, Routledge

²⁶ Auletta, Ken (2012, October 8), *Citizens Jain*. Retrieved from www.newyorker.com

That figure would hold good for most newspapers in India and it is the reason why even leading titles sell for just a few cents. For thousands of families, it is customary to get up to three or four newspapers a day, delivered to home and for millions of others, waking up to a newspaper delivered to your door every morning is simply an ingrained part of the morning routine. Yet, as mentioned in Chapter 1, there are already signs that print advertising is growing slower than advertising in other media and several observers believe that a tipping point has already been reached. The drop in print advertising came even before the launch, in 2015, of the Jio telecom service by Reliance Industries, that has now made affordable 4G enabled smartphones available to millions of Indians who could not afford the service before. Even given a margin for exaggeration, the company recently declared stratospheric numbers - reporting that about 300,000 to 500,000 Indians are migrating everyday to the 'Jio Phone' in order to access high speed internet.²⁷

The rapid changes in the digital media market has of course, not gone unnoticed by legacy news organisations, the majority of whom have invested heavily in their websites and other digital operations. Owing to the historical leverage that their brand power affords them, their reach, in terms of audience numbers, is often exponentially higher than newer digital-born players like *Scroll*. But as with major newspaper brands internationally like *The Guardian* and *Mail Online*, many are reaching the same conclusions - that increased audience reach does not translate to increased advertising revenues. This is not to say that advertising revenue will not still be a dominant factor - and it is likely that organisations will switch from simple display advertising to various forms of programmatic or native advertising - but there is as yet very little original research on these developments and their implications for journalism.²⁸

If it is accepted however, that reader revenue has to provide a significant portion of a news organisations income - and the move toward this trend by digital born media players like *Scroll* and *NewsLaundry* is an important indicator in this regard - then this leaves newspaper companies in an interesting position. In a world where revenues were driven by advertising it was easy to assume that one kind of audience reach (print) would eventually be replaced by another, possibly with more scale (digital) and that eventually one medium would simply replace another. Broadly speaking, the development of most newspaper websites in India seem to have subconsciously operated on the belief in this idea of replacement — with much of the news on print simply being transported to the website, with a mix of softer news to get more

²⁷ ET Bureau (2018, March 17) Reliance Jio network may make India 4G leader in 2019: Mukesh Ambani. Retrieved from www.economictimes.indiatimes.com

²⁸ Rasmus Kleis Nielsen. 2018. *The Changing Economic Contexts of Journalism*, ICA Handbook of Journalism, Routledge

'clicks'. It is arguably only over the last few years that web teams have worked to produce original content. A shift to reader revenue for the digital offering would naturally necessitate a lot more attention to distinctive content online and the way in which it is presented to readers.

When this happens, the newspaper absolutely cannot remain static in form. Barring some notable exceptions like the business daily *Mint*, newspapers in India have never really experimented with changes to the product's architecture - most follow the multi-section format, acting primarily as a compendium of yesterday's news. If readers are to be charged for digital news, it is only logical that the print product should represent a different proposition - a leaner, more streamlined product providing a reader experience that digital cannot offer. Newspaper brands around the world who are successfully navigating the digital challenge all use and position their print products in interesting ways around their larger media mix and some examples of this will be discussed in subsequent chapters.

Indian newspapers can approach this problem from a unique position of strength. Years of reliance on advertising and cheap cover prices may have inhibited major innovation in structure, but it has created a strong reader base and culture for reading newspapers, neither of which is likely to disappear soon. Before a future in which digital subscriptions can start paying the bills, the industry must first look to a period in which print can also be treated as a commodity worth paying for.

Chapter 3: Reading in a digital world

It may be instructive here to start out with a basic premise. It's indisputable that print has several advantages even in the digital age - it is still a wonderfully tactile, focused, quiet and memorable experience. Yet, a surfeit of paper can easily detract from these advantages, making the newspaper experience seem overwhelming when it really should be the opposite. India's vast direct distribution network means that about 98 percent²⁹ of all its newspapers (about 110 million per day, in various languages), are home delivered. Club that with extremely low cover

²⁹ Kansal, Rahul (2011, July 14). India's thriving market depends on robust distribution network. Retrieved from www.inma.org

prices and you have a situation where most households that receive newspapers, and especially readers of English language titles, will get at least two and up to four papers delivered per day.

The mix could take in different combinations - several households get a combination of a vernacular language paper along with an English title while even single paper subscribers, like with the *Times of India* in Mumbai, have their subscription packages compulsorily clubbed with the Times group's tabloid offering, *Mumbai Mirror*. Consider that the *Times of India* alone, is a multi-section newspaper covering local, national and international news with opinion pages, offers a daily city supplement that leans toward entertainment features and a series of other pullout supplements during the week on themes like education and real estate. These supplements are of course, major vehicles for advertising and the intense competition in that space means that the majority of news titles follow the same format with supplements. For households that subscribe even to two newspapers, that is a lot of paper.

3.1 Paper vs Screen

Consider now the factors that set paper apart from other mediums in the digital world. From around the 1980s onward, researchers in fields ranging from psychology, education, information science and engineering have investigated the question of how technology changes the way we read. An exhaustive article in *Scientific American* attempts to summarise the bulk of this research, noting first that it is relevant for just about everyone who reads.

“To anyone who routinely switches between working long hours in front of a computer at the office and leisurely reading paper magazines and books at home; to people who have embraced e-readers for their convenience and portability, but admit that for some reason they still prefer reading on paper; and to those who have already vowed to forgo tree pulp entirely. As digital texts and technologies become more prevalent, we gain new and more mobile ways of reading—but are we still reading as attentively and thoroughly?”³⁰

The article, written in 2013, notes that while people still prefer paper for intensive reading, attitudes toward tablets and e-reading technology may be changing as people start getting use to them. Recently however, that seems to have changed. In 2016, a Nielsen survey found that

³⁰ Jabr, Ferris (2013. April 11) The Reading Brain in the Digital Age: The Science of Paper versus Screens

ebook sales in the UK had declined by 4%, the second consecutive year sales had shrunk.³¹ A corresponding report from the US found that ebook sales declined 18.7% over the first nine months of 2016.³²

Surveys about reading on digital devices have often focused on questions of learning and comprehension and have thus often been centred around schools and universities. Some of the more prominent studies are summarised in *Scientific American*:

“In a 2011 survey of graduate students at National Taiwan University, the majority reported browsing a few paragraphs online before printing out the whole text for more in-depth reading. A 2008 survey of millennials (people born between 1980 and the early 2000s) at Salve Regina University in Rhode Island concluded that, "when it comes to reading a book, even they prefer good, old-fashioned print". And in a 2003 study conducted at the National Autonomous University of Mexico, nearly 80 percent of 687 surveyed students preferred to read text on paper as opposed to on a screen in order to "understand it with clarity".

More recently, a study comparing the ways in which we read on print and onscreen by Naomi S Baron, a Professor of Linguistics at the American University in Washington, gathered data from 429 university students drawn from five countries (the U.S., Japan, Germany, Slovenia and India). Baron found that 92 percent said they concentrated best when reading in print.³³ They were also much more likely to multitask when reading on screen.

A handful of studies have also attempted to look at the question of reading news on screens as against print. They show for instance, that print newspapers and online newspapers are different objects with which users have specific experiences. First, while readers perceive the print newspaper as an object that is complete in itself, they lose the sense of the totality of the object in the case of online artefacts.³⁴ Studies have also indicated that people read news differently (paying less attention) on smaller screens like mobile phones.³⁵

³¹ Cain, Sian (2017, March 14) Ebook sales continue to fall as younger generations drive appetite for print. Retrieved from www.theguardian.com

³² Kottasava, Ivana (2017, April 27) Real books are back. E-book sales plunge nearly 20%. Retrieved from money.cnn.com

³³ Baron, N.S. (2015). Words onscreen: The fate of reading in a digital world. New York, NY: Oxford

³⁴ Fortunati, L., S. Taipale and M, Farinosi. 2015. Print and online newspapers as material artefacts. *Journalism* 16 (6): 830-46

³⁵ Laura, H.O. (2018, April 13). People read news differently (i.e., worse) on phone than they do on desktop, new research suggests. Retrieved from www.niemanlab.org

A new research also highlights an important case study of *The Independent*, the first major newspaper in the UK that shut down its print edition in March 2016 and went digital only. Largely seen as a major portent for the end of print, the new research shows that while stopping the print edition saved *The Independent* some money, it significantly reduced the attention it receives.³⁶ At the time that it shut *The Independent* had about 40,000 print subscribers and 58 million monthly unique views, but research shows that those print readers were responsible for about 81 percent of all time spent consuming *Independent* content. Readers for the digital only platform spend far less time engaging with the site, sampling or glancing through it. It's no coincidence that when the BBC runs a section featuring the front page of all major national newspapers on their website, the *Independent* sends a mock up of what their front page may look like of a print edition still existed.

Perhaps more striking than any academic study however, are the words of Roger Fidler, a new media visionary who came up with a vision for people reading newspapers on mobile reading devices like tablets as far back as 1981. When Apple launched the iPad Fidler's words seemed prophetic. And when Apple sued Samsung over design infringements, the latter used Fidler's initial drawings to argue that the idea was in the public domain. Speaking to the *Columbia Journalism Review* in 2016, Fidler wonders if he had in fact got it all wrong.³⁷ "I have come to realize that replicating print in a digital device is much more difficult than what anybody, including me, imagined."

3.2 The new 'new' media?

All of these studies of course, lead back to print. Strangely enough, rather than newspaper companies themselves reevaluating the materiality of their primary product in order to set it apart in a world of multiple media options, the rediscovery of the affordances of print seems to have begun as an effort by 'new media' companies. Various described as softening boundaries or even as the coming of new 'new media', several well known digital publications, in the US in particular, have ventured into print in moves that seemed counterintuitive. Prominent examples include *Politico*, *Tablet*, *The Pitchfork Review* and the technology website CNET.³⁸ Perhaps the most interesting recent example of 'new print' is Facebook, which has also launched a quarterly magazine called *Grow*.

³⁶ Thurman, N. and Fletcher, R. (2018). Save Money, Lose Impact. *British Journalism Review*, 29(3), pp. 31-36. doi: 10.1177/0956474818798538

³⁷ Rosenwald, Michael (2016). Print is dead. Long live print. Retrieved from www.cjr.org

³⁸ Blair, Cory (2014, December 10). CNET's plunge into print. Retrieved from www.ajr.org

All these platforms believed that deeper, reported pieces work better on print. They also see print as a way to curate content to reinforce a strong sense of community. Alana Newhouse, editor-in-chief of *Tablet*, for instance, says that one of the advantages of print over the web, is that it doesn't have to appeal to everybody. In fact, it's better when it doesn't. "This magazine might not be for you," she writes in her letter from the editor in the first print edition. People want to be part of a tribe, *Tablet's* editorial team notes, and magazines with tailored content for an ardent readership reinforce a strong sense of community.³⁹

3.3 The Print Premium

We've covered so far in this chapter, two key realisations about the materiality of print - that people turn to print over digital when it comes to reading longer, more detailed pieces and that a print product, curated well, can foster a sense of community or tribe. The third feature to reimagining print, and one that is particularly crucial for India, is the price point. It is understandable to assume that older readers who have been buying newspapers or magazines at reduced costs for years and may not consume a lot of news online, will object to the cost price of the print product rising. But what of the younger readers who will eventually become the main customer base?

The conventional thinking around younger readers, or millennials, is that they don't read or read online and only consume content that is free. While it may be true that they consume the bulk of information online, research from the US in particular, reveals that millennials are actually willing to pay for print. For example, millennials are opting for the print edition of *The New Yorker* at a rate 10% higher than older demographics while over at the Atlantic, new subscribers aged 18-24 have jumped 130 percent since November 2016. At *The Economist*, similarly, a spokesman told Politico that the 18-24 and 25-34 age groups have been key drivers of new subscriptions. *The Washington Post* and *New York Times* also reported similarly, that their subscriber growth rates were highest among millennials.⁴⁰ The print experience is now seen as an antidote to lives lived in front of screen. Millennial love print because it presents an escape

³⁹ Gourarie, Chava (2015, December 7) Print is the new 'new' media. Retrieved from www.cjr.org

⁴⁰ Schwartz, Jason (2017, 21 October), Young subscribers flock to old media. Retrieved from www.politico.org

from digital.⁴¹ As Michael Brunt, Chief Marketing Officer for *The Economist* put it - "You can read to the end of the economist but you cannot read to the end of the internet."

Can these trends on print be applied to other contexts and to other countries? Politico partly attributes the growth of print subscriptions the so-called Trump bump, with people feeling the need to get more politically engaged, suggests that the level of engagement with news may be a big factor. In Brazil for instance, broadsheets like *O Globo*, that are trying to innovate with digital subscription models and a redesign of the paper, do so from the perspective that young readers do not engage very much with news. Both the digital subscription offers and the redesigned newspaper are aimed at readers above 55, according to *O Globo's* executive editor Leticia Sorg.⁴² Elsewhere, studies from Europe like the Reuters Institute study on paying for news, while not focusing on print, have found that millennials are at least willing to pay for news online.

In India, it is fairly clear that people not only engage with news but also like to do so with the print product. The fact that positive numbers for the growth of regional newspapers is directly correlated with rising literacy numbers is enough indication for this. In an era of unprecedented internet use in the country, driven by cheap smartphones and falling data prices, it is undeniable that news companies have to compete for immediacy, for putting out the news as it happens. But in a digital world where the flow of information is overwhelming, it is more important than ever to stand out - to tell the story of who you are while telling the story and make a deeper association with your readers. The print product is the perfect vehicle to do this. There is a reason after all, why the the country's newest digital start up opted to call itself *The Print*. The promoters say this is to signal to its readers that 'standards would be high'.⁴³

There are millions of readers still, who enjoy the print product as it is for the daily delivery of news. We must conclude though, that there are more readers, current and future, who will enjoy a print product but not the multi-format, compendium of news that it is now. Distilling the materiality of print, and pivoting toward a premium, subscription based model is a process that should start now.

⁴¹ The new lean, mean print magazine (2018) From: Innovation in magazine media 2018-2019 world report.

⁴² Author's interview with Leticia Sorg (2018, April 21)

⁴³ Prabhakar, Binoy (2017, October 5). India's most famous newspaperman Shekhar Gupta pivots to digital with *The Print*. Retrieved from www.thespicenewsroom.com

Chapter 4: The newspaper for the digital age

The next two chapters will delve into the editorial model, addressing issues of design and content. Through some important case studies from around the world, they will address the question of what a printed newspaper should look like, playing up the inherent qualities of paper, in an age where much of the news is already a known quantity before the paper is published.

For print innovation with the daily newspaper, the most prominent example is perhaps the *Financial Times*. The FT is of course, a pioneer in the transformation from newspaper company to digital enterprise where revenue from online subscriptions pays most of the bills, so it should only follow that they were the first to seriously consider where the print product fit into this new universe.

When the FT announced its redesign or ‘refresh’ in 2014, it had 677,000 subscribers - but only 222,000 of those were buying the paper edition.⁴⁴ The other subscribers had digital subscriptions, thus reversing the heavy print majority that prevailed earlier — print circulation reached a peak of 504,000 in 2001. Yet, despite print circulation dropping by nearly half, FT’s editor Lionel Barber was keen to stress the continuing importance of the print edition, variously referring to it as a fashion accessory and marketing tool, and as a vital part of advertising revenue.⁴⁵

Speaking to *Quartz* about the the paper’s redesign, Kevin Wilson, FT’s head of design, said: “We increasingly define ourselves as a digital operation, but we still have a successful print newspaper with a good readership, providing valuable ad revenue. And we thought it was time to show we still cared about that product. But also to redefine some of our priorities—what is the print newspaper, what can it deliver best, and what is its relationship to digital?”⁴⁶

In the print edition, that meant a focus away from breaking news and toward more analysis and longer reportage. For starters, apart from a new font called Financier, a new six-column grid replaced the earlier, denser, eight-column page, giving stories more room to breathe. The rest of

⁴⁴ Silverberg, Michael (2014, September 15), The Financial Times reboots even as readers flock to digital. Retrieved from www.qz.com

⁴⁵ Giner, Juan Antonio (2014, June 17) From a news business to a networked business: The FT pushes its workflows to digital. Retrieved from www.niemanlab.com

⁴⁶ Silverberg, Michael (2014, September 15), The Financial Times reboots even as readers flock to digital. Retrieved from www.qz.com

the redesign had as much to do with aesthetics as with FT's ongoing deliberations on the interplay between print and digital.

The basic philosophy behind this had already been outlined by Barber in a speech made back in 2011 titled "The Future of News and Newspapers in the Digital Revolution".⁴⁷ Barber explained that the web product will increasingly serve as the form which produces "the news now" and will be rawer and more immediate than the printed form. Editors, he said, will have to distinguish between high worth news and analysis — that would go on the web — and material that can be enriched and refined for a more lasting form for print. "In sum, the web will likely adopt more of a broadcast mentality, compared to its more considered cousin, the newspaper."

Other publications, Barber pointed out, had already made moves in this direction. In particular, he used the example *Svenska Dagbladet* or SvD, an upmarket tabloid in Stockholm that had propagated the notion of "fast" and "slow" journalism for the web and print. An article that appeared in *The Guardian* in the same year as Barber's speech noted that SvD been making a name for itself with radical changes to its editorial policy that saw it go into profit at a time when many titles in Sweden were losing revenue.

"To that end, the news pages — including the front page — are heavily planned ahead, with up to 40% produced in advance. The newsroom is divided into two streams: "fast", covering events that cannot be controlled, such as tsunamis, for both web and print; and "slow", concentrating on what SvD describes as its "agenda-setting" journalism."⁴⁸ The motto of its managing editor, Martin Jonsson, quoted in the article was, "Anything that can be done in advance, must be done in advance."

4.1 Redefining workflows

In implementing these ideas in their redesign, the FT first started by reducing the amount of paper it put out. According to Robin Kwong, head of digital delivery at FT, who has worked with the publication for the past ten years, the paper moved from having multiple London editions that were constantly updated, to a single global edition and a single UK edition. The changes in newsroom structures were also evident to see. "The newspaper production team for

⁴⁷ September 14, 2011, Lionel Barber's Fulbright Lecture: The Future of News and Newspapers in the Digital Revolution. Retrieved from www.ft.com

⁴⁸ Wilson Emily (2011, May 9) Newspaper's key to boosting circulation is planning to be better. Retrieved from www.theguardian.com

the night shift went down from a team of 40-45 people to just about seven,” Kwong says.⁴⁹ And the production process itself was made easier by the fact that the FT introduced a set of templates pages that editors could choose from. This typically followed the format of a news story on top and an anchor piece below which offered readers more depth and analysis. While not straying completely into magazine territory, the print edition, in effect, became something of a hybrid — a ‘newzine’ if you will.

While the templated pages standardised formats made forward planning easier, the ad department also responded by rethinking ad sizes, concentrating them down to a small number of standard shapes. In an interview with design consultant, Mario Garcia, Wilson also says that the FT created a more standard form for infographics, making them more identifiable with the FT. This was important as the reader research showed how important the FT’s infographics were and now that they were being shared on social media it was important to give them a sharper character that could translate easily from online to print.⁵⁰

More crucially, as Mark Leeds, the design consultant for the project explained, the more concise edition of the paper played well with reader groups. “No one was asking for more (stories, pages etc). However, they did want clarity and ease of use.” A commitment to print and its possibilities, as the FT redesign clearly was, did not involve more paper but simply a more focused use of it.⁵¹

4.2 The Emergence of a Trend

Writing for *Nieman Lab’s* ‘Pushing to the future of Journalism’ series in December 2016, Kathleen Kingsbury, managing editor for digital at the Boston Globe, writes that many of the biggest newsrooms have already started to carve out print desks with dedicated resources.⁵²

“This started as an effort to free newsgathering teams to concentrate on digital and the masses it serves. But what’s happened is these smaller, isolated teams report they’re putting out higher quality, more tailored products,” she writes. In 2017, she continues, more news organizations will come to see print as a platform, taking advantage of its best self, particularly as a means to

⁴⁹ Interview with Robin Kwong. (2018, June 23)

⁵⁰ Garcia, Mario (2014, September 15) Financial Times: a classic redesign for the digital age. Retrieved from www.garciamedia.com

⁵¹ Garcia, (2014, September 15)

⁵² Kingsbury, Kathleen (2012, December) Print as a Premium Offering. Part of the Nieman Lab predictions for journalism in 2017. Retrieved from www.niemanlab.org

display large graphics, ambitious illustrations, or life-sized photos. Kingsbury refers in particular, to the *New York Times*, which in 2015 announced that it was moving most print production responsibilities away from individual desks and placing them in the hands of a centralized group of editors.⁵³

What follows from these experiments with print now is a more composite idea of what a digital first newsroom should look like - geared toward reaching readers first on digital platforms while still respecting the print product, which for many cases still provides the bulk of the revenues while still being an important product for both readers and advertisers.

The German daily *Die Welt*, for instance, took note of the *New York Times*' changes to its print desk, similarly restructuring its own newsroom so that a group of only a dozen editors and designers bring out the print product. The team doesn't assign stories and only draws from what has been published online.⁵⁴

Speaking recently at the Reuters Institute for the Study of Journalism, Gary Liu, the CEO of the *South China Morning Post* in Hong Kong who was appointed in 2016 to oversee the paper's digital transformation, also described how the paper created a dedicated print desk. "The pages were redesigned and most of the pages were also templates which made them easy to lay out. This didn't affect the quality of the print product," he said.⁵⁵ Similarly, in Brazil, the broadsheet *O Globo* is in the process of redesigning its print product to make it more selective and more analytical with a smaller team, even as its operations are geared toward bringing in more digital subscribers.⁵⁶

4.3 The redesign of an Indian business daily

It is from the perspective of these changes taking place elsewhere that we can now assess what is perhaps the most prominent attempt to change the architecture of a newspaper in India — the redesign of the business daily *Mint* in 2016. In a note accompanying the paper's first edition in broadsheet (it was previously published in a Berliner format) editor R Sukumar noted that the paper will have "the navigational aids, wraps, long-form narratives, and data stories that in

⁵³ 2015, October 6, Changes to News Hub Operation - note to staff by executive editor Dean Baquet. Retrieved from www.nytc.com

⁵⁴ Wang, Shan (2015, October 30) German daily Die Welt wants to bundle print, digital, and TV into a single newsroom (and brand). Retrieved from www.niemanlab.org

⁵⁵ (2018, June 11) Gary Liu seminar at The Reuters Institute for the Study of Journalism

⁵⁶ Interview with Leticia Sorg, Executive Editor, O Globo. (2018, April 27)

many ways define what a newspaper should be in the digital era. In effect, this isn't just a cosmetic change in design and size but a fundamental rethink of a print product—and in terms of content too."⁵⁷

While largely conforming then, to the trends noted earlier in using the print product to play up longer narratives, opinion and infographics, the redesign of *Mint* features a few prominent differences. For starters, it goes bigger rather smaller, moving to a broadsheet format that Indian readers are perhaps more familiar with. It also features a number of design elements, especially in terms of navigability, that attempt to recreate a user experience that people might want to find on the web. Chief among these is the concept of having two front pages — front for business and back for politics — that creates easy access for going straight to the type of stories the readers is looking for. A daily briefings page then summarised the major events in short, much as a concise online newsletter would, and parts of the paper feature digital pointers — flagging the print reader's attention to interesting and complimentary offerings on *Mint's* digital platforms.

"Navigation was key in that change," explains Mario Garcia, who oversaw the design. "Also, eliminating brief items that people consume digitally and giving more space to longer in depth and analysis pieces. People come to print to have a larger meal, not merely snacking."⁵⁸

Perhaps the best way to understand this redesign is to place it in the Indian context where print is still predominant but forward looking editors have noted the incredible growth of digital media and a coming change in the status quo. It's impossible to put a time frame on that change, so *Mint's* redesign can perhaps be seen as a preliminary attempt to create a distinct role for the paper within the larger media set. For *Mint*, as with *South China Morning Post* and *O Globo*, the majority of revenue still comes from print and at the time of writing, neither *Mint* or *SCMP* have online subscription offers. There is an increasing realisation however, as with the case of *FT*, that loyal print readers may not seek more in terms of pages or stories but may come to the paper for a more relaxed experience, to make sense of news they already know.

The newspapers of the future will, and must, increasingly take this shape — of playing up the strengths of print reading for opinion, analysis, long form narratives and infographics. Where possible, as several companies have shown, moving toward a forward planning schedule, more akin to a magazine, can also significantly free up resources that can be used to develop ways to find new audiences digitally while still maintaining and even enhancing the appeal of the print

⁵⁷ Sukumar, R (September 13, 2016), A newspaper for the digital era. Retrieved from www.livemint.com

⁵⁸ Email interview with Mario Garcia (2018, June 16)

product. Mediums do not replace each other, as discussed in previous chapters, but they can often displace. The newspaper might well become the new magazine, in small doses on weekdays and in a more defined way on the weekend.

Chapter 5: The Right Time for Print - Addressing the Question of Frequency

In a forward looking media set, even one in which the majorities of revenue come from online subscriptions, such as the Financial Times, the print newspaper still has an important role to play in terms of defining the brand and giving readers something tangible to associate with. In monetary terms however, could the future of print, as a profitable part of the media set, hinge on the targeting of readers at certain key times?

The weekend newspaper as a different, larger proposition to a more humdrum weekday offering is not a new one. In Britain for instance, the idea of a multi-sectioned weekend product with a variety of supplements was pioneered by *The Sunday Times* with the intent of stopping readers buying rival titles. The phrase 'reading the papers' on a Sunday still has a colloquial association with the *Times*. Retaliating soon after was the *Daily Telegraph*, expanding its Saturday paper, so that, as Stephen Brook writes for *The Guardian* in 2008, "the quality Saturday papers had eclipsed their Sunday counterparts in pagination and sections."⁵⁹ These days, the battle for the weekend seems to take a more holistic approach — a print heavy product with stories that remain relevant on both Saturdays and Sundays, a concept first introduced by titled like the FT.

Even back in 2008, sales of the Weekend FT, which included sections personal finance, lifestyle, food and wine, was selling higher than the weekday edition. That concept has not changed in 2018, but when editors now speak of the 'opportunity of the weekend' they are projecting to a time, foreseen for some time, when there will be a fundamental shift in newspaper reading habits. That is the death of the weekday newspaper and the focus of print shifting entirely toward a weekend art.

⁵⁹ Brook, Stephen (2008, 21 April), Who's winning the weekend? Retrieved from www.theguardian.com

“People will want to disconnect on the weekend, and the power to disconnect will be powerful,” says Mario Garcia, design consultant and senior adviser on news design at the Columbia University School of Journalism. “Some call it the luxury of paper, the luxury of lean back consumption of news and information without alerts, push notifications, or the temptation to go to emails or social media. The weekend paper will be more in depth, more magazine, more essential in helping people with their daily lives.” Many newspaper houses around the world, Garcia says, are already looking to a time when newsprint will no longer exist Monday to Friday.⁶⁰

It is that line of thinking that informed the Weekend FT’s latest refresh in 2017, which the company promoted through a marketing campaign focusing on the tagline: World Class Writing. The campaign is visually evocative, showing for instance, five consecutive images of a woman walking with a laptop then followed by an image of her with a surfboard — conveying the idea that the work week would be followed by a more relaxed experience over the weekend. The campaign, in the words of FT’s marketing department, was aimed at “a growing readership who favour the immersive experience of print on the weekend while remaining highly engaged with digital journalism during the week.”⁶¹

For the product itself, a refresh in 2017 meant more focus than ever in building a strong weekend paper with sections culture, arts, travel, style, property and food and drink accompanied by a redesigned FT magazine and a raft of new columns and sections. After the relative austerity of the weekday editions, the FT Weekend, a proposition of plenty with its range of features and supplements, can be leisurely consumed all through Saturday and Sunday. When done right, it’s easy to see why the weekend read is seen as the future of the printed product, and why the pivot toward making print a premium offering is hinged on the weekend edition.

When thinking about the weekend newspaper though, it’s important to remember that a balance must be struck. Juan Senior, President of Innovation Media Consulting Group, and my supervisor for this paper, uses the analogy of a supermarket to describe the print business. A supermarket makes most of its money on the weekends when people are free to shop. Nevertheless, it has to stay open through the week. Ceasing to print from Monday through Friday, especially in markets where print remains relatively strong, is a strategy laden with risk.

⁶⁰ Email interview with Mario Garcia (2018, June 16)

⁶¹ (2017, May 13) Designing FT Weekend’s New Branding, Retrieved from www.swystuncommunications.com

Navigating that risk, and coming up with ways in which print and digital strategy can effectively work together, forms the second and more interesting part of the frequency question.

5.1 Compacts and digital editions

The previous chapter attempted to tackle the question of the kinds of content that should go into a print product in the digital age. While it discussed strategies such as introducing templated pages and planning ahead for publication schedules, the overarching theme, perhaps, was that it had to provide a sense of something finite and selected. A product that can cut through the clutter of information in the online world and suggest to readers that this seeming overload of information can still be assembled in a hierarchy of importance. That approach can work with a smaller, streamlined print product but it's also an approach that can be translated to the web where creating packaged publications with a beginning and an end has helped publishers better engage with their readers than typical news flow websites.⁶²

One of the strongest proponents of this edition-based approach is the *The Times* and *The Sunday Times* which, in 2016, moved away from the constant updating of digital news to a focus on creating three updates for their digital editions each day. In the first year of this digital transformation, *The Times* and *The Sunday Times* have seen massive growth and the average number of pageviews up 300%.⁶³ The approach may also have helped the *Times* titles announce for the first time this year that digital subscribers now outnumber the number print subscribers for the first time.

While the *Times* titles adopt this approach across their digital platforms, there are also effective strategies for separating commodity news from a more curated edition-based approach. The influential German daily *Sueddeutsche Zeitung*, for instance, has a complex subscription model that is a mix of free, metered and premium. Visitors can see basic news for free and up to 10 articles written by correspondents and reporters before being asked to subscribe. For subscribers, a separate Android and IOS application provides access to a daily digital edition of the paper.

⁶² Philips, Mary-Katherine (2018, July 10), Newspapers succeeding by returning to edition-based publishing. Recovered from www.twipemobile.com

⁶³ Philips, Mary-Katherine (2018, July 10), Newspapers succeeding by returning to edition-based publishing. Recovered from www.twipemobile.com

About a third of SZplus subscriptions come from print readers who want to 'live in both worlds', with a growing number looking at digital on weekdays and print on Friday and Saturday. The digital edition is popular with readers who want a finite, recognisable product.

"The free SZ.de app, which we call the white app, provides users with a constant stream of information, enabling them to see the most relevant news 24/7. In this app, you read and see what is going on in the moment. In contrast, the 'green' app follows the more traditional approach newspapers are known for: It's a bundle of content that you can download, which provides an overview of what happened during the day.⁶⁴ The app is not necessarily aimed at print readers, Koenig says, since SZ likes people to read them in print, but at everyone who prefers a three course meal to a buffet that is constantly changing.

Both the SZ and Times' strategy is an important way to think about how readers might want to access news, particularly when the majority of readers do not have time on weekdays to go through a large multi-sectioned newspaper or may, indeed, have little patience for a website that offers endless content. A digital edition of the newspaper online can also act as a supplement to print readership and eventually help in encouraging more people to embrace the idea of paying for news online that is curated in a finished form. The broad contours of the argument on frequency however, remain the same — less paper on the weekdays and a more streamlined news reading experience which then eventually leads to a burst of high quality print, covering a variety of topics, that can be consumed at leisure over Saturday and Sunday.

5.2 *The Hindu* and the weekend paper in India

In 2009 *The Times of India*, India's largest English daily and the world's largest selling English newspaper launched a weekend edition called *Crest*. It was launched as an attempt to go beyond the issues of the day, combining in depth, long form narratives with an eclectic range of features, referred to generally as 'back of the book' sections. In the words of the editor, *Crest* was meant to be a product in which good writing would heighten the joy of reading. The idea of *Crest* was a weekend edition that would be a weeklong read.

Four years later, in 2013, *The Times of India* shut down *Crest*, with the major reasons being that the weekend edition didn't pull in enough advertising. It was essentially a limited edition

⁶⁴ Email interview with Micheal Koenig, (2018, June 28)

product, said one company official and advertisers would not be willing to pay a premium for it.⁶⁵ It was noted soon after by media observers that valuable lessons could be learnt from the failure of *Crest*, particularly for those interested in premium content offerings, but that the industry was unlikely to analyse it in any great detail.⁶⁶ Certainly, As the behemoth title in the Indian newspaper industry, strategic decisions by the *Times of India* are often seen as a bellwether for what works and doesn't work in the market.

One way to understand the failure of *Crest* as a viable business proposition is to look at how the Indian advertising market evolved with respect to weekend editions.

"The weekend paper was always a vanity product, something to round off the paper and showcase its ability to do features. It used to sell for a higher price and was a different proposition for advertisers looking to reach different markets," says Sidin Vadukut, who was editor of the *Mint on Sunday*, a digital product that had a two year run before closing earlier this year.⁶⁷ The idea of carrying feature articles on lifestyle or entertainment during the weekday was controversial, Vadukut says, but that changed when the *Times of India* in the late 90s introduced a *Bombay Times* supplement — in the late 90s, a glossy pull out featuring content on celebrities, fashion and retail.

"*Bombay Times* basically legitimised the idea of doing features on the weekdays and every other paper basically responded by launching their own weekday feature supplement," Vadukut says. Within a couple of years, the weekday pull out became the most important advertising vehicle, subsuming virtually all of the advertising that used to go into weekend papers. What was already a vanity product became even more difficult to run as a business proposition for advertisers and it increasingly became sidelined in the larger business. Weekend editions continued to exist for all papers, but what the *Times of India* attempted with *Crest* — in terms of its scale and ambition as a unique content proposition for the weekend — was not replicated.

It is with this larger foregrounding that we can look at the decision by another national daily, *The Hindu*, to introduce a large, multi-sectioned Sunday newspaper in 2017. The *Hindu on Sunday*, launched with an accompanying advertising campaign with the tagline 'Sundays are for reading', was created very much along the lines of the lean back weekend reading experience emphasised by FT and others, with a clear focus on offering a range and diversity of

⁶⁵ Upadhyay, Venkatesh (2013, July 16) The Times of India to close Crest edition. Retrieved from www.livemint.com

⁶⁶ Rangaswami, Ananth (2014, December 21) Learning from the death of the Times of India Crest edition. Retrieved from www.firstpost.com

⁶⁷ Interview with Sidin Vadukut (2018, June 24)

content. It was also, by Indian market standards, a radically different price proposition. The Hindu on Sunday is priced at Rs 15 (by comparison, *Crest* was priced at Rs 6) while the price of the weekday paper was also increased to Rs 10.

“I believe that the future of good journalism depends critically on securing and then sustaining a paying audience,” Mukund Padmanabhan, editor of *The Hindu* says. “An environment in which newspapers are totally dependent on advertising for their revenues is necessarily an unhealthy one. We need to find ways to earn at least a substantial part of our revenue from circulation. We think there is a paying audience for good content and *The Hindu on Sunday* was launched out of this belief.”⁶⁸

In making the move to launch a larger Sunday edition, Padmanabhan says he was influenced by the experience of publishers in Europe.

“I talked to a number of people during a conference of publishers in Holland, and listened to their experiences and experiments about publishing on Sundays. There was also data suggesting that some newspapers depend critically on Sundays for their income and that their weekday circulation was poor,” he says.

Weekday circulation continues to remain strong in India and part of *The Hindu's* strategy, with the Sunday paper as well as with the main edition, was to emphasise that it was focusing on print. “From today, we bulk up by giving you more pages every week. We do this by increasing the number of base pages — dramatically on Sundays and fairly significantly on other days,” reads a note from the editor.⁶⁹

The Hindu on Sunday is a fascinating case study for two reasons — first it is perhaps the first attempt to test the willingness of readers to pay premium price. This is hugely significant in a market where news online is free and news on print, thanks to advertising revenue, is also virtually free. Conversely however, *The Hindu on Sunday* is a premium weekend offering that operates within the standard content structure of every major newspaper. Weekend features therefore, compete in print and online with weekday feature supplements. There are lingering questions, as with *The Times of India* and *Crest*, as to whether a more niche weekend edition can be sold as a valuable proposition to advertisers or indeed if reader revenue alone can ensure its survival.

⁶⁸ Email interview with Mukund Padmanabhan (2018, June 18)

⁶⁹ Padmanabhan, M (2017, February 16) Editor's note on the Hindu's relaunch. Retrieved from www.thehindu.com

Quite apart from this, is a more fundamental question. Does increasing the amount of paper on weekdays diminish the lean back reading experience that a weekend edition could offer? In an Indian market saturated with a plethora of offerings — in print, online and in television — the strategy of offering more and more content has to give way at some point to offering different reading experiences and better gauging what kind of news to deliver when. A move to a more streamlined weekday offering, and perhaps an edition based publishing approach online, is a must.

5.3 Print's second wave: pop up print

It would be remiss to exclude, in a chapter talking about frequency, some exciting experiments taking place with print that have all to do with timing. Take for instance, the Summer and Winter Weekly newspapers launched by the global affairs and lifestyle magazine *Monocle*. *Monocle* is a magazine that knows its readers intimately and spotted an opening in the market — they knew that their readers escaped to three or four popular resort destinations over summer and winter and wanted to reach a weekly newspaper, written in the signature monocle style, to its readers at a juncture where they had the time and luxury to read⁷⁰. Aside from global news the weekly newspapers, which had a four edition print run, also featured sections on food, wine, culture, art, architecture and design. *Monocle* founder Tyler Brule has previously stated that he is very interested in the idea of a weekly newspaper and *Monocle* continues to experiment, launching a Spring Weekly this year. Given the brand's success in leveraging the power of print — and more importantly making print profitable — it is an interesting space to watch.

Of more relevance to India and Indian newspapers perhaps is another example from the UK — *The New European* which launched as a print-only paid circulation weekly newspaper in July 2016 in response to the Brexit vote in the UK. The UK publisher Archant thought there should be a newspaper for the 48 percent of the UK population which voted no.⁷¹ Initially, the publisher only planned for issues but when it sold 40,000 copies of the third issue, they decided to keep publishing.

⁷⁰ Print innovations. From innovation in Magazine Media 2018-2019 World Report. Edited by Juan Senor and John Wilpers

⁷¹ Print innovations. From innovation in Magazine Media 2018-2019 World Report. Edited by Juan Senor and John Wilpers

“I’d always been struck by the concept of a newspaper or printed media being a form of visible demonstration of what you are,” editor Matt Kelly told FIPP.com. Print, he says, has a reputation for being old and tired, but it is still possible to innovate and it remains a powerful medium. “It can trigger engagement in many other platforms and has a very high sense of concrete value,” he notes.⁷²

The success of *The New European*, provides an intriguing glance into future possibilities with print in India. Projecting into the future, what if newspapers are published only during elections for instance, as a high quality product that has cut and keep value, at a time when political engagement in the country is high. Or perhaps during important sessions of parliament. As Matt Kelly observes again, print can sometimes be more agile than digital, and a good group of designers and writers may find it easier to bring out a print product than to design a bespoke website. Take print out of its formulaic position in the media set up, and the the possibilities are endless.

Conclusion:

Over the last six chapters, this paper has attempted to tackle different aspects of the debate surrounding the future of print. In particular, it has opposed the framing of that debate as one medium against another — as print vs digital. In the history of communication one medium of communication has never killed another. As a medium, the peculiar history of paper is that its presence has always caused anxiety, with various attempts being made through the years to imagine a world without paper. Yet it’s value remains eternal.

The past few years have seen a number of newspaper companies become major digital successes. From the *Washington Post* and *New York Times* in the US to the *Financial Times* and the *Times and Sunday Times* in the UK, the number of digital subscribers are beginning to overtake or have already overtaken the number of subscribers in print. None of these publications however, have announced any plans to stop their printed product. In fact, they are all treating print, arguably, with more care than before, looking for ways to reinvent it for profit. Take for instance, the *The New York Times International Edition*, which in content and format, now resembles a daily news magazine. Or the *FT Weekend*, which is strong enough to become the

⁷² Pecquerie, Bertrand (2016, September 29) ‘Pop-up’ newspaper The New European: Can print be more agile than digital? Retrieved from www.medium.com

future of the company's business even if it one day decides to stop its paper run from Monday through Thursday.

There are two important arguments to be made here. To start with the obvious first, if print is done well, with proper value behind it, it can thrive and flourish. This is not to say that print circulations will not decline, there is no returning to the golden age of mass circulation for newspapers and magazines. But the decline will not be precipitous, and at a certain level, circulation will flatten out and remain lucrative. Going back to an idea articulated in chapter 1, for print, flat may be the new up.

The idea of reinventing print for profit then, involves acknowledging the resilience of the medium itself as well as acknowledging that much of the news industry is in a difficult moment with digital media and the potential for advertising-led growth. The current debates surrounding the difficulties being faced by digital born media outlets are discussed in chapter 2 of this paper, which also links it to a larger debate about the business of news after advertising. For all the millions that have been invested in growing reach and garnering more audiences, leading industry figures in advertising such as WPP's Martin Sorrell and P7G's Marc Pritchard have noted that traditional media such as print still performs better when it comes to engaging people and holding reader's attention.⁷³ Their observations are allied to academic research such as professor Neil Thurman's, referred to in Chapter 1, that speaks to the higher user engagement with print.

Provided it changes and adapts then, print can continue to have a bright future. Yet, it is important to point out once again, that this paper is not a Luddite argument for print over digital or a contribution to a chorus of voices that Rasmus Kleis Nielsen, director of research at the Reuters Institute for the Study of Journalism, aptly refers to as 'media change deniers'.⁷⁴ That digital is the future should be beyond question. But as is the case when a new medium emerges, there is a period when the forms of the old are simply translated to the new. The text-based model may have worked successfully for years in print, but digital requires a new language and new ways of constructing narratives. Once it does that, print can then finally find its place within the larger media mix.

This paper has largely focused on examples in which print has already begun that journey, notably in companies that have already made great strides in finding that language for digital

⁷³ Pathak, Shareen (2017, March 1) The rise of the digital advertising truther. Retrieved from www.digiday.com

⁷⁴ Nielsen, R.K. (2018, May 24) Media change deniers: Why debates around news need a better evidence base — and how we can get one. Retrieved from www.niemenlab.com

and which are continuing to invest resources in exploring new forms of storytelling online. Digital transformation is the first priority, whether it be for the *New York Times*, *Financial Times* or the *South China Morning Post*, but based on those case studies, one can argue for a specific role for print.

The first is that every newspaper, in India or elsewhere, has to move beyond the American style multi-section format approach where page after page contains news that can either easily be sourced from elsewhere or which in most cases is already known to readers ahead of publication. This is of course, if they are serious about reinventing print for profit and are not merely interested in retaining it as a vehicle for advertising.

For the printed paper on Monday to Thursday or Monday to Friday, the print edition should be handled by a specialised, smaller team, incorporating a mix of 'slow' news stories that are planned or commissioned in advance, and refining and expanding on fast news stories that are derived from what is published online. The result should be a newspaper that allows stories the space to breathe with large displays and one that should be unabashed about its role as a selector and curator of news for its readers. The physical product after all, remains the best platform to showcase the newspaper's editorial judgment and values. There are several examples, from the *Financial Times* in the UK, to *Die Welt* in Germany and the *South China Morning Post*, to show how this can be achieved with templated pages and single print editions, so that resources can be devoted elsewhere.

The mix of a smaller, more considered weekly paper and the consumption of news through digital platforms should lead to a larger role for the print offering on the weekend. Resources have to be devoted to ensuring that it is truly 'lean back', that sections can be kept can be read across the weekend and that the content is truly worth paying a premium for. Because, most crucially, any strategy with reinventing print has to aim at pricing the product exponentially higher. In the Indian market, aside from *The Hindu*, which has priced its Sunday paper at Rs 15, no other news organisation has moved prices up for fear of losing readers.

That focus on readers is important because while volume has been the defining factor behind every business decision in an industry dominated by advertising revenue, there are signs that things are changing. The incessant search for traffic and hits is slowly giving away to an understanding that having a smaller, more dedicated reader base may be fruitful over the long run. It is for this reason, that this paper also argues for a more considered approach in presenting news online, perhaps with the adoption of a digital edition style strategy. Content is important here, and with in an Indian market with a veritable surfeit of digital offering from local news companies it's more important than ever to cut through the clutter.

Unlike many other markets, print circulation and advertising has remained strong in India. One might have expected that to be a factor in delaying any major change, but the past year has seen several consequential changes. Just as experts have noted that rising newsprint tariffs in the US could be a Black Swan event that may herald unprecedented changes in the print industry there,⁷⁵ India is similarly going witnessing an unprecedented rise in newsprint costs owing to a number of factors such as an increase in raw material costs, falling value of the Indian rupee against the US dollar and China imposing a ban on the import of several types of waste paper (it was earlier the world's largest paper recycler, producing the raw material that is essential for newsprint).⁷⁶

The pressure on newsprint will necessitate a number of changes which have already started. Various publications have already responded by increasing retail prices or cutting down pages. Whether that trend continues and if it represents a major reckoning for the newspaper industry remains to be seen. It adds another dimension however, to what is already a formidable concatenation of circumstances, starting with the rapid change in the digital market brought about by Reliance Jio and the consequent fall in print advertising numbers which mean that a major change in the way the industry functions is not far off.

These changes, to the largest newspaper market in the world, will, over the next few years, provide rich material for documentation and research. One can safely say that it is more important than ever now to be more aware of these changes while simultaneously learning from examples and trends set in other markets around the world where the narrative around digital transformation and the changing role of print are more advanced. I hope that this paper finds a place in what should be a long and evolving discussion.

⁷⁵ Doctor, K (2018, July 20), Newsnomics: Newspaper tariffs are a Black Swan event that could speed up the death of U.S. newspapers. Retrieved from www.niemanlab.org

⁷⁶ Saxena, N (2018, March 26) Spotlight: Newsprint price sees 40% hike, Industry worried. Retrieved from www.exchange4media.com

