

ENDERS|ANALYSIS

## **News consumption for DMGT**

2011 update

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**November 2011**

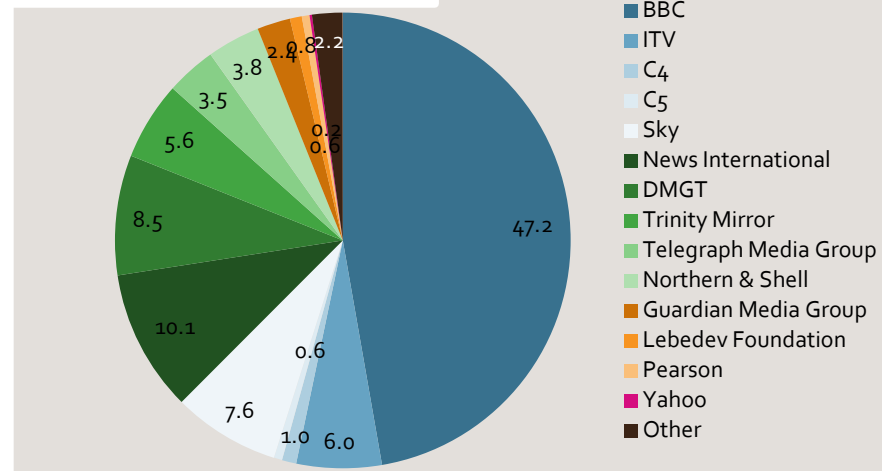
## Total news day

- The following slides outline the news day for the average UK consumer. We have used the same methodology as last year and we have added a few different scenarios: 30% of newspaper time is news, the absence of the BBC and different medium weighted by average attention, as defined by Ofcom in their 2010 Communications Market Report
- We started with the recognised source for consumption in the UK:
  - For Newspapers and News Magazines we took readership and time spent data for national newspapers from the NRS. We then multiplied the data out to cover all UK adults (newspaper's penetration is 98%). NRS classifies adults as 16+
  - For Radio we took listening data from RAJAR and made assumptions as to news minutage on a station-by-station basis. For BBC Radio 4 we assumed 16 minutes per hour, for BBC Radio 5 we assumed 11.2 minutes per hour and for all other stations we assumed 2 minutes of news per hour. We then multiplied the data out to cover all UK adults (radio's penetration is 91%). RAJAR classifies adults as 15+
  - For Online we used total time spent on News/Information websites based on Comscore definitions. We then multiplied the data out to cover all UK adults (news/information websites' penetration is 67%). Comscore classifies adults as 16+
  - For TV we conducted two runs on BARB. The first calculated the viewing share of the 24 hour rolling news channels, while the second looked at news programming on the five PSB channels (BBC 1 & 2, ITV1, C4 and C5). We combined these two runs and then multiplied the data out to cover all UK adults (TV's penetration is 96%). BARB classifies adults as 16+

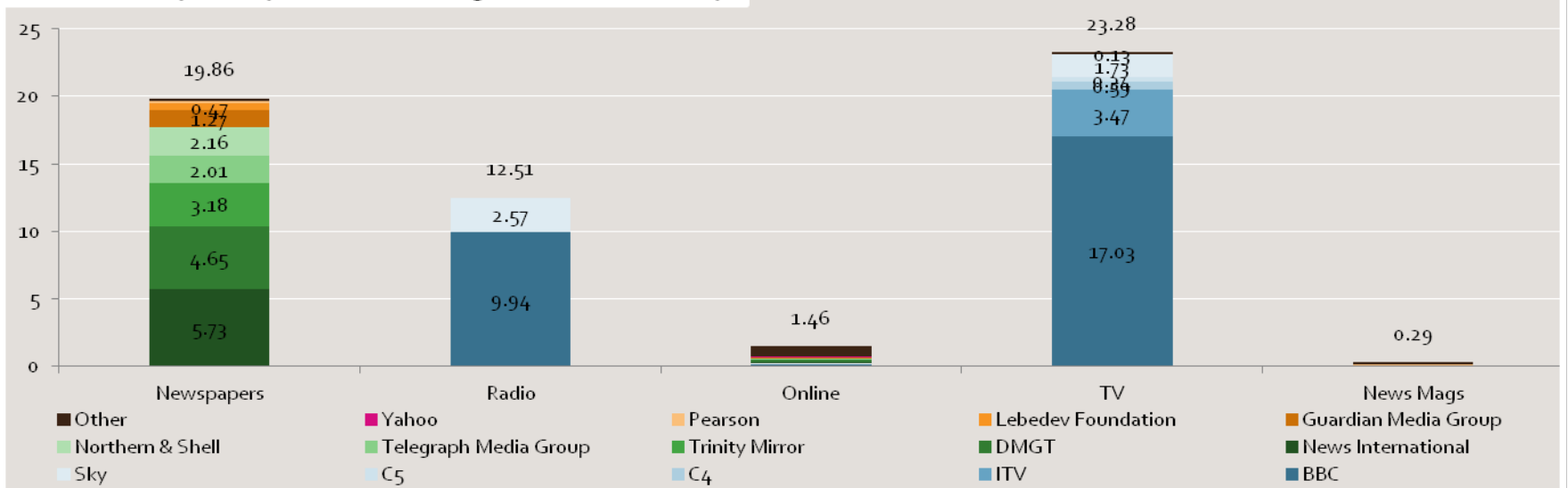
# Total news day with no adjustments – September 2011

- The average UK adult receives 57.4 mins of news a day
- 62% is broadcast, and 38% print, either physical or digital
- The BBC comes out as the dominant provider of news – BBC TV news is watched for 17 minutes a day and BBC radio news is listened to for just under 10 minutes a day, giving the BBC a 47% share of the total news market

News day by organisation (%)



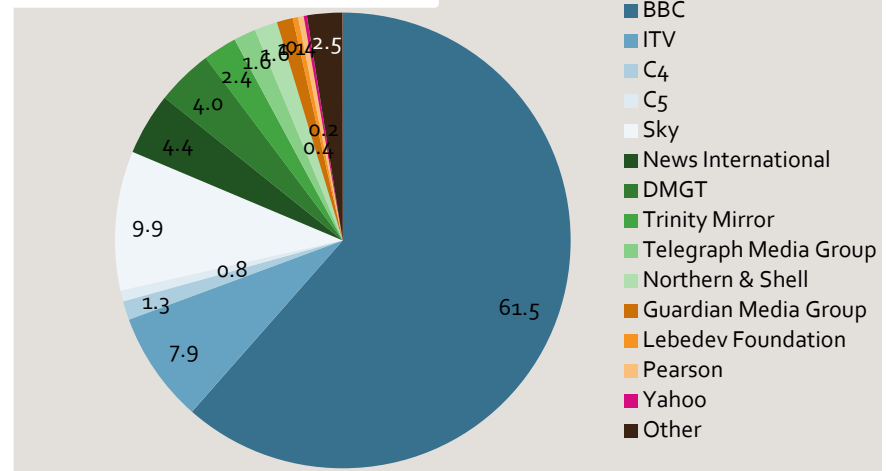
News consumption by medium and organisation (mins/day)



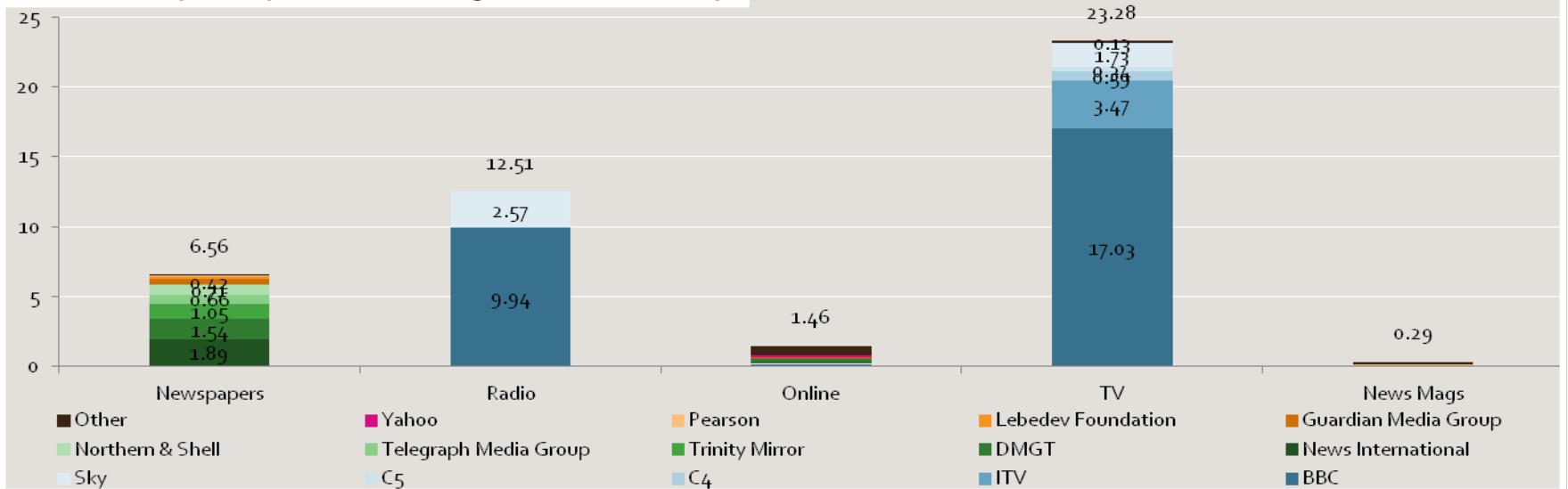
# Total news day: only 30% of newspaper time is news – September 2011

- In this scenario we assumed that only 30% of time spent with newspapers is time spent consuming news (the remainder being time spent with the crossword, lifestyle, features etc.)
- This had the obvious impact of reducing the print publishers share of time spent with news, and increasing the BBC's and other broadcaster's share of news provision
- In this scenario the total news day reduces to 47.2 minutes, with broadcast's share growing to 76%

News day by organisation (%)



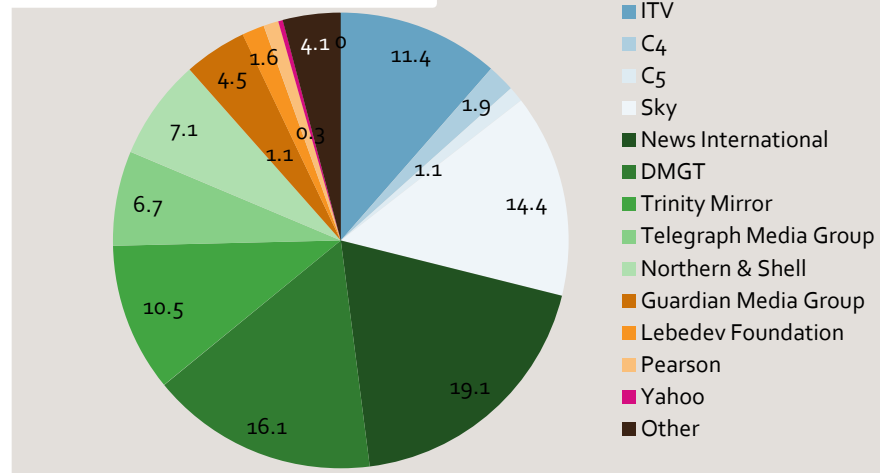
News consumption by medium and organisation (mins/day)



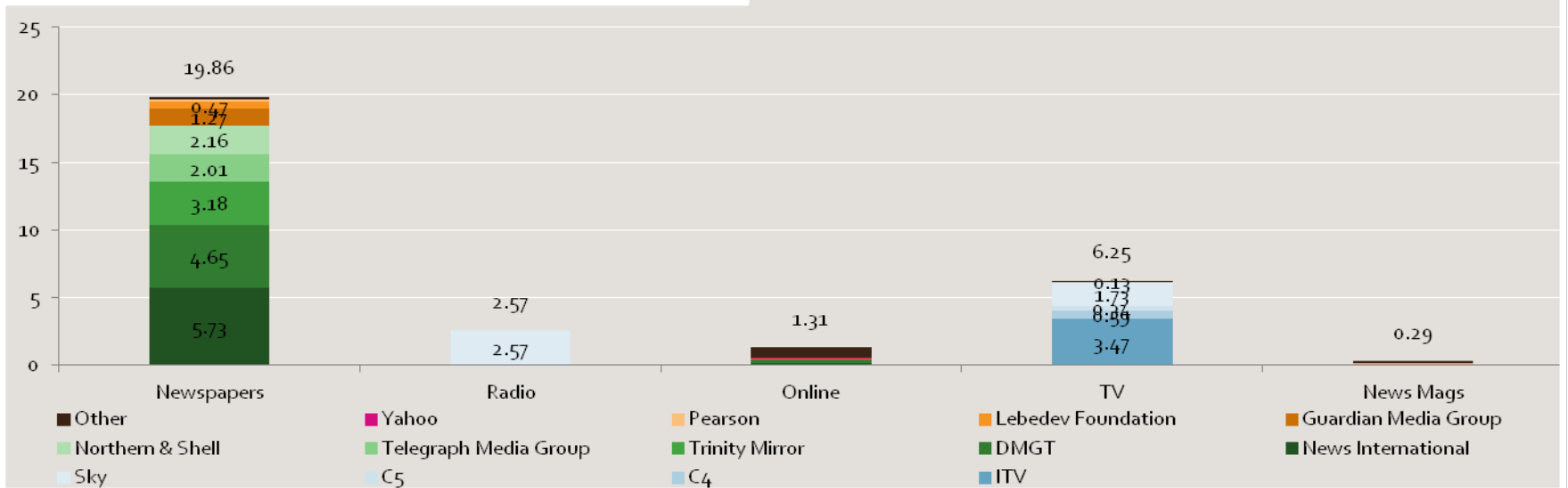
# Total news day: no BBC – September 2011

- In this scenario we have removed the BBC from the news market
- The total news day effectively halves to 30.29 minutes, and broadcast's share of new provision drops to 29%, with print growing to 71%

News day by organisation (%)



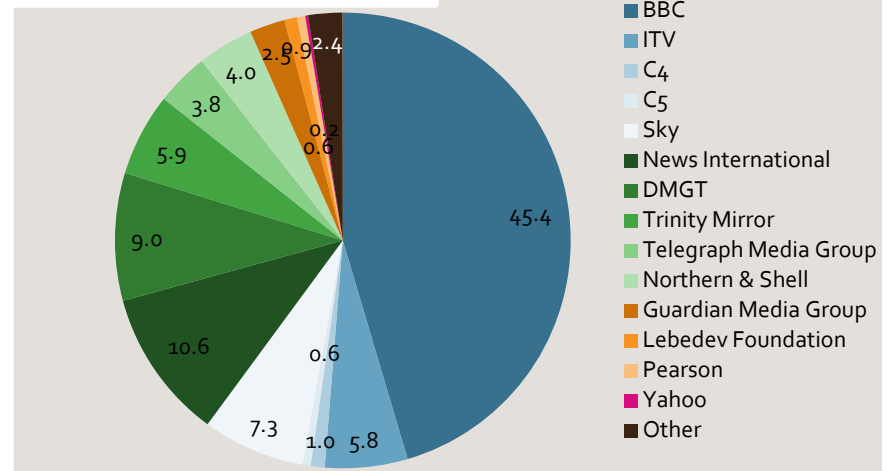
News consumption by medium and organisation (mins/day)



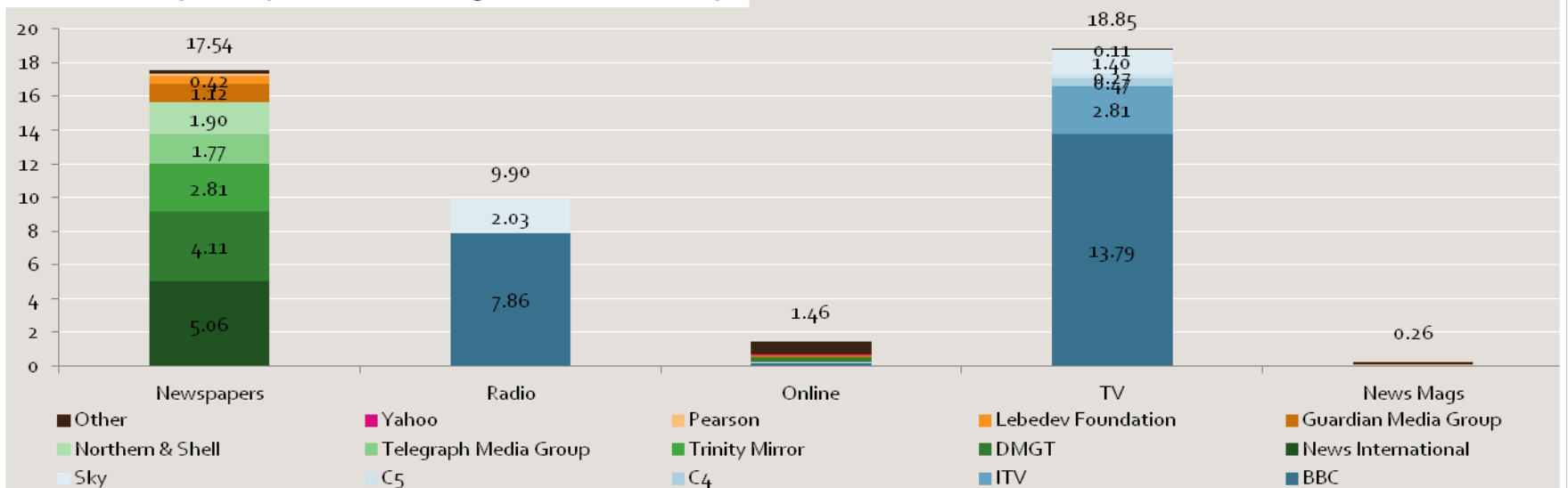
# Total news day: weighted by average attention – September 2011

- In this scenario we have weighted each medium based on Ofcom's attention level by activity chart in their 2010 Communications Market Report. Ofcom asked their panel to rate the attention they were paying to a media activity they were undertaking on a scale of 1 to 5 (5 being most attention). The figures we used to weight our results were:
  - Online: 3.68, Reading: 3.25, TV: 2.98, Radio: 2.91
- This had the effect of reducing the total media day to 48.01 minutes, and shrinking the broadcaster's share of the market. Broadcast's share of news provision fell to 60%, with print rising to 40%

News day by organisation (%)



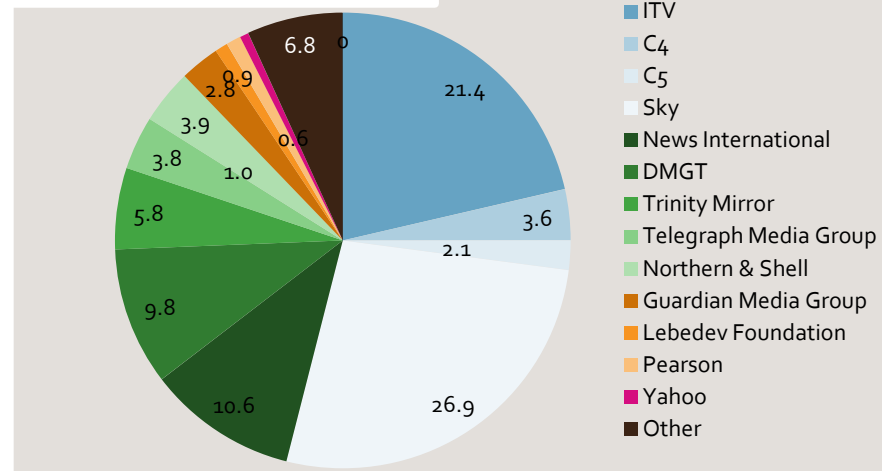
News consumption by medium and organisation (mins/day)



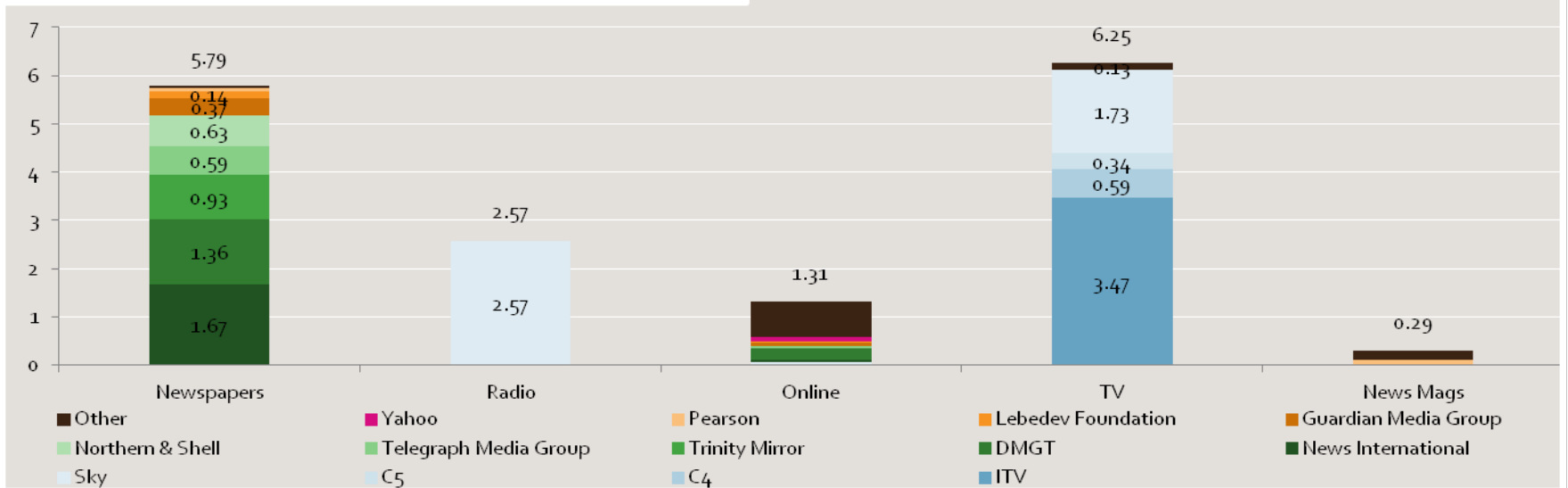
# Total news day: no BBC and only 30% of newspaper time is news – September 2011

- This scenario combines slides 4 and 5 to give a situation where there is no BBC and only 30% of newspaper time is spent reading news
- The total news day falls to 16.2 minutes, with a broadcast share of 54% and a print share of 46%

News day by organisation (%)



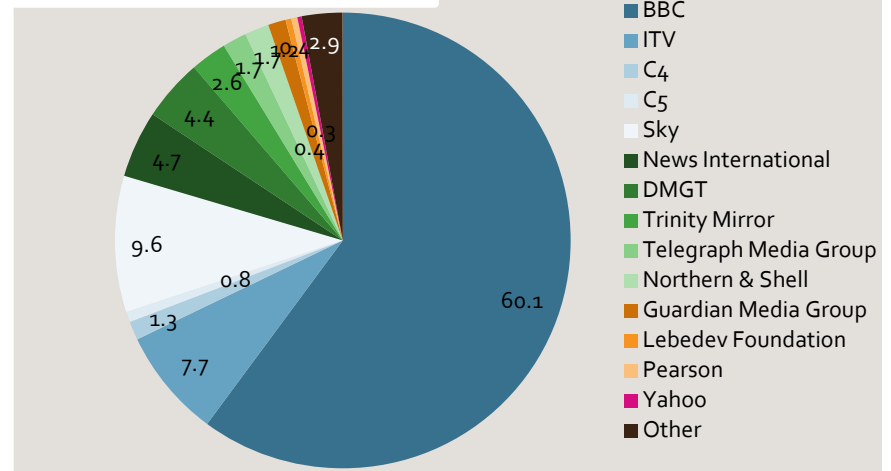
News consumption by medium and organisation (mins/day)



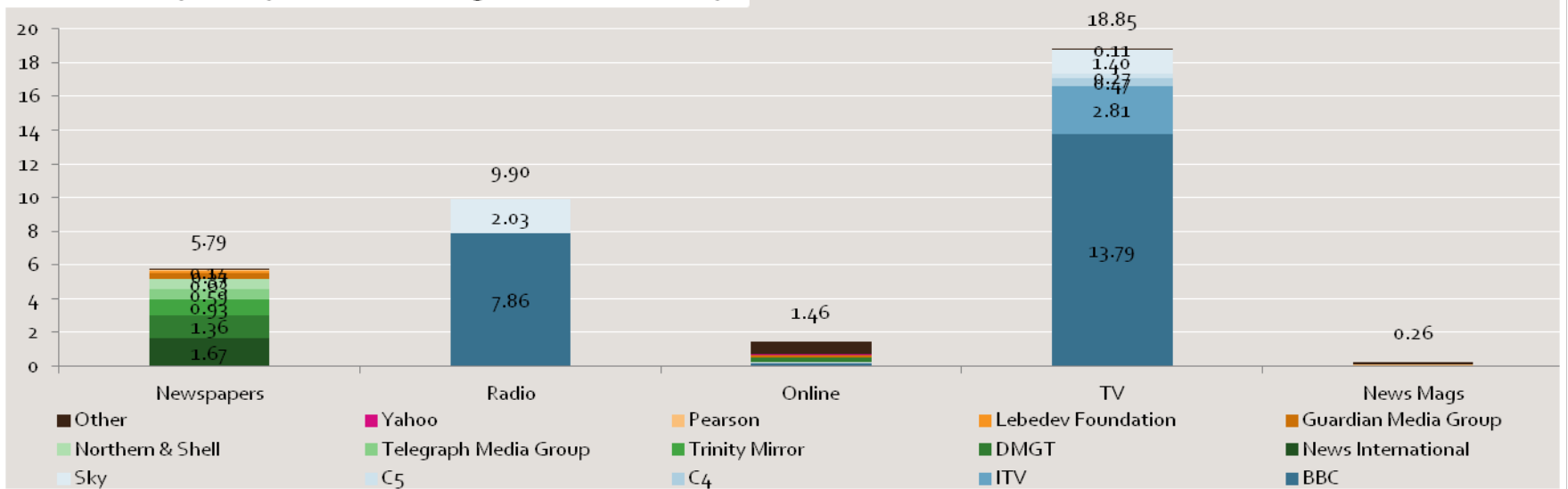
# Total news day: only 30% of newspaper time is news and weighted by average attention – September 2011

- This scenario combines slides 4 and 6 to give a situation where only 30% of newspaper time is news and the numbers are weighted by the average attention paid to different media
- The total news day falls to 36.3 minutes, with a broadcast share of 79% and a print share of 21%

News day by organisation (%)



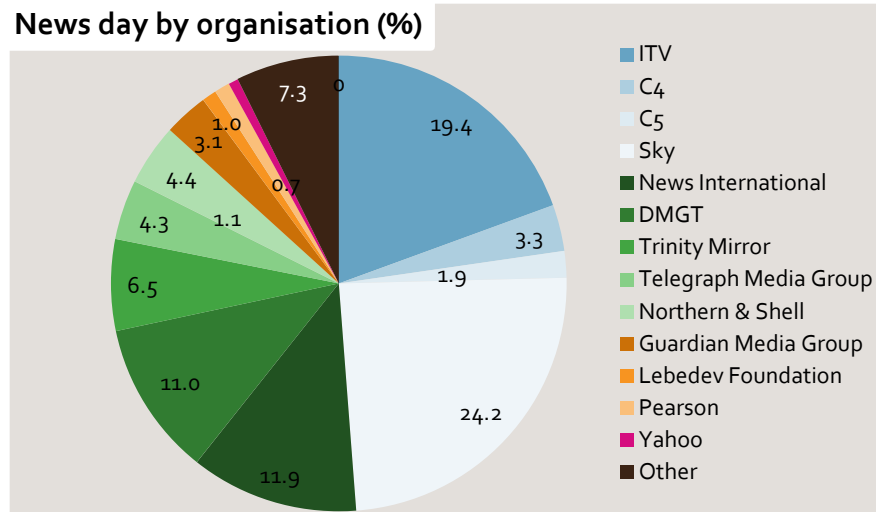
News consumption by medium and organisation (mins/day)





## Total news day: no BBC, only 30% of newspaper time is news and weighted by average attention – September 2011

- This scenario combines slides 4, 5 and 6 to give a scenario where there is no BBC, only 30% of time spent with newspapers is spent consuming news and the numbers are weighted by the amount of attention paid to different media
- The total news day falls to 14.5 minutes, with a broadcast share of 49% and a print share of 51%



### News consumption by medium and organisation (mins/day)

