

National Newspapers - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Heightened controversy over the spread of fake news and misinformation in 2016 has presented established national newspaper brands with an opportunity to reaffirm to the public the important role they play in terms of offering reliable journalism.”

– **Rebecca McGrath, Senior Media Analyst**

This report looks at the following areas:

- **Ad blockers and aggregators threaten advertising revenue**
- **Fake news controversy opens door for newspapers to re-establish authority**

The now well-established trend for national newspapers continued in 2016, with print circulation declining further while online browser numbers increased. Mintel’s research shows that few people now purchase a print newspaper more than once a week and the *Independent’s* decision to become digital-only (the first UK national newspaper to do so) further cements that the future of national newspaper titles rests on the success of their digital platforms.

The smartphone is now by a significant margin the primary device on which people consume online news, highlighting for national newspapers that they should have a mobile-first outlook for their digital content. Social media is also an increasingly important tool for newspapers in terms of reaching larger, younger audiences, while the popularity of aggregator platforms (eg Facebook’s Instant Articles) presents new challenges in terms of monetising content.

The highly-charged controversy surrounding the issue of fake news and its impact on elections in 2016 has presented national newspapers with an opportunity to stamp greater authority in regards to their role as reliable news sources. Increases in print newspaper circulation figures during the EU referendum highlighted the fact that during times of major events people will often return to familiar and established news sources and formats.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

National Newspapers - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The market

Print circulation see further decline while online growth continues

Controversy over fake news calls into question the role of social media

Section 40 causes concern as press regulation battle continues

Brexit vote boosts print circulation

Ad blockers further threaten advertising revenue

Key players

The Independent becomes first national newspaper to focus solely on digital

The Telegraph replaces metered paywall with new premium subscription service

The consumer

Only one in four regularly purchases a print newspaper

Figure 1: Print newspaper purchases, October 2016

A smartphone is the most popular device for reading news

Figure 2: Devices used to read national news, October 2016

The BBC dominates online news

Figure 3: National news websites/apps visited, October 2016

Many are reading directly on news reader app/websites

Figure 4: National newspaper behaviour, October 2016

Readers of quality newspapers more likely to feel current newspaper journalism is worth paying for

Figure 5: Attitudes towards online national newspapers, October 2016

What we think

Issues and Insights

Ad blockers and aggregators threaten advertising revenue

The facts

The implications

Adapting to the popularity of ad blockers and aggregators

Paywalls and other monetisation options

Fake news controversy opens door for newspapers to re-establish authority

The facts

The implications

Promoting the reliability of national newspapers

Editors or algorithms?

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

National Newspapers - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The Market – What You Need to Know

- Print circulation see further decline while online growth continues
- Controversy over fake news calls into question the role of social media
- Section 40 causes concern as press regulation battle continues
- Brexit vote boosts print circulation
- Cover prices rise further
- New news aggregators produce mixed results for publishers
- Ad blockers further threaten advertising revenue

Market Size and Forecast

- Print circulation sees further 5% decline
 - Figure 6: Trends in total UK annual print circulation, 2011-21
 - Figure 7: Trends in total UK annual print circulation, 2011-21
- The number of online browsers continues to grow
 - Figure 8: Trends in selected national newspaper website visits*, 2012-16

Market Drivers

- Further growth in mobile device ownership
 - Figure 9: Personal ownership of consumer technology products, September 2015 and 2016
- Cover prices rise further
 - Figure 10: Basic UK cover prices for national newspapers, January 2016 and December 2016
- Controversy over fake news calls into question the role of social media
- Ad blockers further threaten advertising revenue
- Section 40 causes press concerns as press regulation battle continues
- Brexit vote boosts print circulation
- New news aggregators produce mixed results for publishers

Key Players – What You Need to Know

- The Times increases print circulation
- The Mail Online is most popular national newspaper website
- The Independent becomes first national newspaper to focus solely on digital
- The Telegraph replaces metered paywall with new premium subscription service
- The UK's first ever pop-up newspaper launches after referendum
- The Telegraph launches new video portal
- The Mail explores ecommerce further

Launch Activity and Innovation

- The Independent becomes the first national title to focus solely on digital
- The Telegraph replaces metered paywall with new premium subscription service
- The Telegraph launches new video portal
- The Guardian focuses on branded content with 'Hosted by'
- The Mail explores ecommerce further

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

National Newspapers - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- The FT launches new analytics tool for journalists
- Advertising campaigns remind people of the importance of national newspapers
- The UK's first ever pop-up newspaper launches after referendum

Market Share

- All newspaper segments see decline in circulation
Figure 11: Daily national newspapers' average print circulation per issue, 2015 and 2016
- Popular Sunday titles see worst declines
Figure 12: Sunday national newspapers' average print circulation per issue, 2015 and 2016
- The Mail Online is by far the most popular newspaper website
Figure 13: Average daily unique visits to national newspaper websites, 2015 and 2016
- The Guardian and Mail Online lead the way on social media
Figure 14: Social media presence of select major UK newspapers, 2016 and 2017

Brand Research

- Brand map
Figure 15: Attitudes towards and usage of selected brands, January 2017
- Key brand metrics
Figure 16: Key metrics for selected brands, January 2017
- Brand attitudes: quality newspapers' reputations drive an increased willingness to pay
Figure 17: Attitudes, by brand, January 2017
- Brand personality: The Guardian is viewed as the most ethical
Figure 18: Brand personality – Macro image, January 2017
- Popular newspapers are considered low-brow
Figure 19: Brand personality – Micro image, January 2017
- Brand analysis
- The Guardian has high levels of trust
Figure 20: User profile of The Guardian, January 2017
- The Financial Times has a strong identity
Figure 21: User profile of Financial Times, January 2017
- The Times lags only behind the Guardian on trust
Figure 22: User profile of The Times, January 2017
- The Daily Telegraph trails other qualities on differentiation
Figure 23: User profile of The Daily Telegraph, January 2017
- The Daily Mail is considered relatable
Figure 24: User profile of Daily Mail, January 2017
- The Daily Express struggles to stand out
Figure 25: User profile of Daily Express, January 2017
- The Daily Mirror scores well on accessibility and value but doesn't make as strong an impression as rivals
Figure 26: User profile of Daily Mirror, January 2017
- The Sun divides opinion

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

National Newspapers - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 27: User profile of The Sun, January 2017

The Consumer – What You Need to Know

- Only one in four regularly purchases a print newspaper
- A smartphone is the most popular device for reading news
- The BBC dominates online news
- Many have read news directly on an aggregator website/app
- One in five has used an ad blocker
- There is limited trust in online national news
- Many find text news preferable to video
- Younger people are more interested in VR news

Print Newspaper Purchases

- Only one in four regularly purchases a print newspaper
Figure 28: Print newspapers purchases, October 2016
- Major events encourage people to buy newspapers
Figure 29: Print newspaper purchases, by age, October 2016

Devices Used to Read National News

- A smartphone is the most popular device for reading news
Figure 30: Devices used to read national news, October 2016
- Readership via smartphone peaks among 25-34s
Figure 31: Devices used to read national news, by age, October 2016

National News Websites/Apps Visited

- The BBC dominates online news
- The Guardian is the most popular online national newspaper
Figure 32: National news websites/apps visited, October 2016
- Two out of five only use one source
Figure 33: Repertoire of national news websites/apps visited, October 2016

National Newspaper Behaviour

- Many are reading directly on news reader app/websites
- The Sun launches new edition on Snapchat
Figure 34: National newspaper behaviour, October 2016
- Social media plays an important role for younger people
Figure 35: Social media behaviour, by age, October 2016
- One in five has used an ad blocker on an online newspaper

Attitudes towards Online National Newspapers

- Newspapers need to strike the right balance with video content
Figure 36: Attitudes towards online national newspapers, October 2016
- Only some feel current national newspaper journalism is worth paying for

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

National Newspapers - UK - February 2017

Report Price: £1995.00 | \$2510.51 | €2325.77

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

There is limited trust in online news websites/apps

Younger people are more likely to prefer editorial judgement to algorithms

Figure 37: Agree with statement 'Having the stories 'selected' for me by editors/journalists is better than by an automatic system based on previous reads, what friends are viewing etc', by age, October 2016

Younger people are more interested in VR news

Figure 38: Agree with statement 'watching stories using virtual reality technology appeals to me', by age, October 2016

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

Appendix – Market Size and Forecast

Forecast

Figure 39: Trends in total UK newspaper circulation, 2016-21

Forecast Methodology

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com