

Mehrwerte 2023

Regional daily newspaper insights
No. 6



Content

Thought Leadership Research

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Preface

For readers, trust and credibility are still the most important assets in the fast-moving and volatile media world. For advertisers, they are awareness and impact. In this sixth edition of our Mehrwerte booklet we provide even more impressive proof of the quality of regional daily newspaper brands in the dimensions of usage, advertising and impact quality based on various study methods and campaign-related research.

The regional daily newspaper brands – both print and electronic versions – as well as the more than 420 regional editions and advertising papers that we market, are indispensable, versatile and effective components of the communication and media mix.

Read on for inspiration!

If you'd like to know more you can find recent studies and cases in the market research section of our website. Check them out and follow us on LinkedIn.

A handwritten signature in black ink, appearing to read "C. Dorn".

Carsten Dorn
Managing Director

A handwritten signature in black ink, appearing to read "Ingo van Holt".

Ingo van Holt
Chief Sales Officer

Zeitungs- facetten 2022

The digital usage trend continues

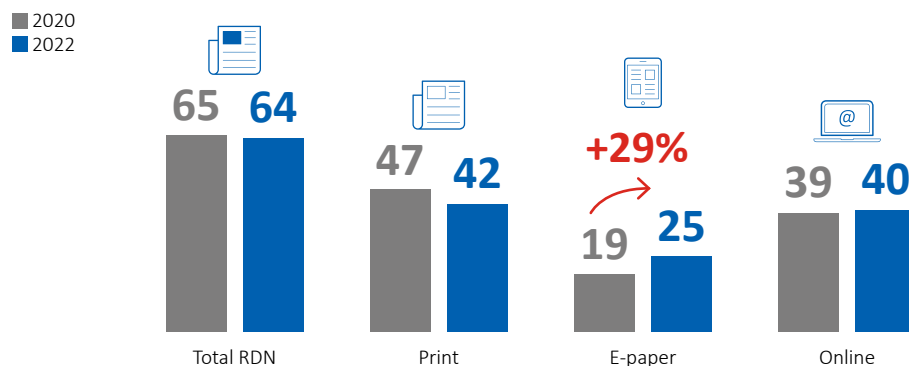
The use of digital channels and the development of paid content are the focus of our 'Zeitungsfacetten 2022'.

The regional daily newspaper (RDN) always has been and still is a mass medium. It is read by 64 percent of the German population across all channels at least once a week. There has been clear and continuous growth of digital readership: online usage, especially e-paper usage, has increased significantly and print usage is at a high level.



"I use the following regional daily newspaper services at least once a week"

(Figures in %)



Base: Total 2022 n=5,406; 2020 n=5,527

Willingness to pay for digital content is on the rise

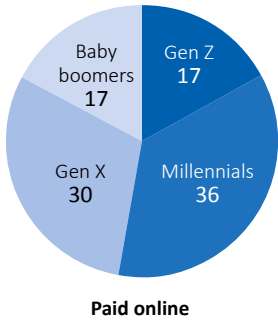
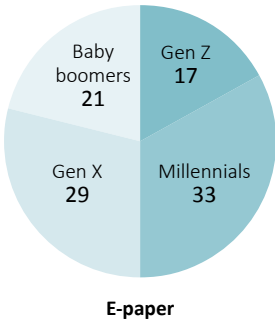
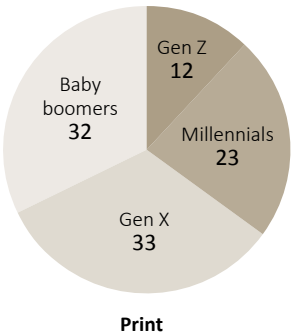
45 percent of online readers already use paid regional daily newspaper services. This represents an increase of almost 12 percent to 18 percent – a 53 percent increase versus last year – across the entire respondent base. Another survey finding was particularly interesting and relevant for future potential: Paid advertising content usage is highest among millennials.



Usage: millennials prefer digital canals such as e-papers and paid online content

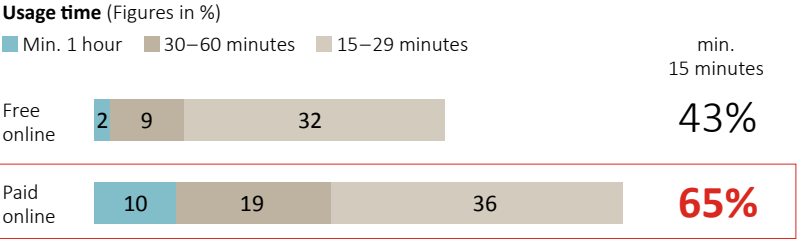
(Figures in %)

- Gen Z (15–21)
- Millennials (22–35)
- Gen X (36–53)
- Baby boomers (54+)



Base: Print n=2,323; E-paper n=1,398; Paid online n=1,069

Paid content users are more attentive readers: 44 percent of paid online content users access the web versions of their regional daily newspapers at least once a day compared to only 39 percent of free online content users. The difference between these two user groups is even more distinct in the dimension of usage time. 65 percent of paid content users read their newspaper for at least 15 minutes.



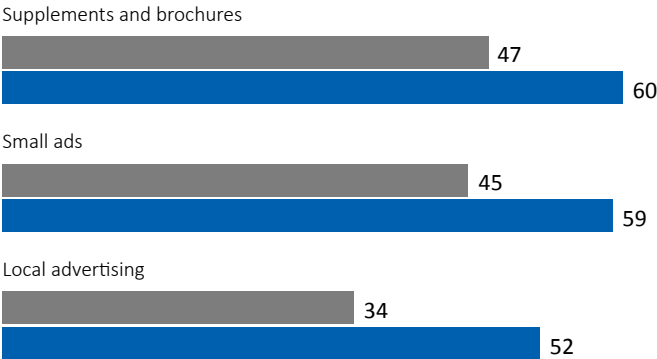
Base: Free online users n=1,339; Paid online users n=1,069

Paid content users have a high level of advertising affinity

(Figures in %)

■ Free online ■ Paid online

Paid content users aren't just interested in editorial content, there is also increasing demand for advertising content. These users are more interested in supplements and pamphlets, small ads and local company advertising than free content users.



Base: Free online users n=1,339;
Paid online users n=1,069
Top 2 box with a 4 point scale



Local content is key in digital media

All readers are very interested in regional news content – from practical everyday topics to information about local events, local business news or background information and anecdotes about city life – but the level of interest level is higher among paying readers. That's why local news is the USP for regional daily newspapers, including the digital versions.

81%

pay for the online use of regional
daily newspapers to get access to
relevant local information.

Base: Paid online=1,069

Study brief

Methodology

Representative online survey
of 5,406 people aged 15–64

Field time

January 2022

Agency

Dentsu Resolutions

Advertising Papers & Supplements

Ads in advertising papers are well received

A special analysis made in connection with the 'Zeitungsfacetten 2022' illustrates the use and advertising impact of advertising papers.

31 million people in Germany or 54 percent of the 15 to 69 age group in Germany read an advertising paper (AP) at least once a week. So advertising papers are still a relevant medium for both people and advertisers. There is a clear usage scenario based on user expectations of content.

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81%

of readers expect to find **supplements and brochures** in advertising papers.

74%

of readers expect to find **announcements about regional events** in advertising papers.

73%

of readers expect to find **local business ads** in a advertising papers.

Base: Advertising paper users n=2,809

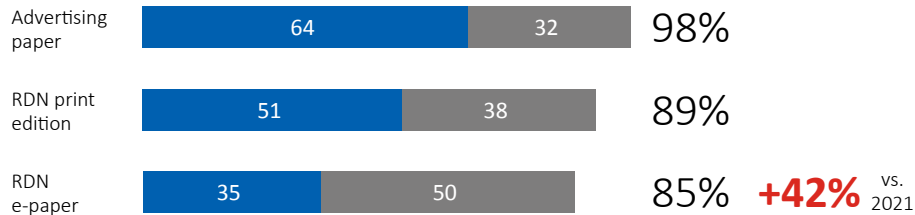


Supplements perform well in any environment — both daily regional newspapers and advertising papers

(Figures in %)

■ Usually skim/read it

■ Occasionally skim/read it



Base: Advertising paper users who get supplements n=2,702; Print n=2,112; E-paper n=1,036

Advertising papers are a source of valuable information for the majority of respondents: 66 percent of users who read advertising papers at least once a week said they use the advertising in the papers to plan their weekly shop. An even higher number of respondents (69 percent) use the advertising to find discount price offers. A slightly higher number of respondents (74 percent) use supplements in advertising papers to plan their weekly shop.

Study brief

Methodology

Representative online survey
of 5,406 people aged 15–69

Field time

January 2022

Agency

Dentsu

Paid
Content

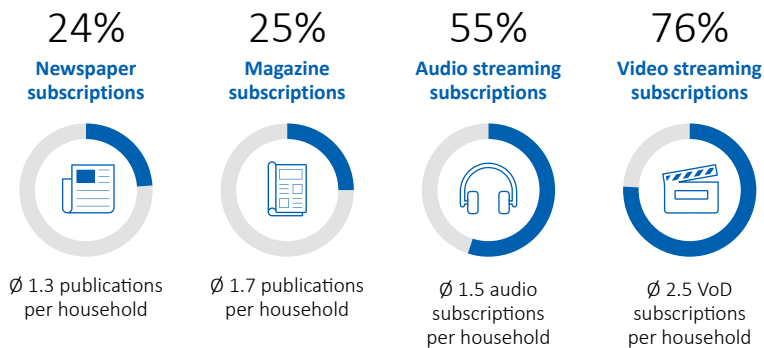
Typology of newspaper readers

A shift to paid content is occurring in news, newspapers and magazines, streaming and audio products.
How much are people prepared to pay for subscriptions and what user types exist?

Our paid content study provided the answers to these questions. Based on the findings, we defined three user types for newspaper readers. Across all media genres: paid video streaming services are the most frequently used paid content in German households (76 percent). On average, every video-on-demand household (VoD) has 2.5 streaming subscriptions.

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Media subscriptions per household



Base: Total n=4,001

9%

of respondents would cancel their regional daily newspaper subscription to save money.

19%

of respondents would cancel music or video streaming subscriptions to save money.

Print reader persona –
‘sociable family person’ user type

Readers of printed daily newspapers have an average of five media subscriptions and spend €62 a month on them. The print reader persona likes to spend time with family and guests. They are price conscious but willing to pay more for comfort and convenience.

64%
of print RDN readers
are happy to spend more
for convenience.

55%
describe themselves
as bargain hunters.

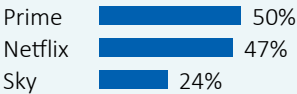


5 media subscriptions
per household (Ø)

16% of households also
subscribe to TV magazines
(e.g. TV14, TV Digital)



Top 3 streaming services



Monthly spend on
media subscriptions

€62



Hobbies

- / 63% like doing things
with their families
- / 59% often invite guests round

Base: Households with at least one print
RDN subscription n=514; Readers=523





E-paper reader persona — 'Open to new ideas' type

Enterprising, adventurous and tech-savvy are all adjectives describing the typical regional daily e-paper reader. They also use streaming services more than any of our other personas.

69%

of e-paper readers like to try out new products.

63%

get excited about new technologies.



6.4 media subscriptions
per household (Ø)

18% of households also have
current magazine subscriptions
(e.g. Der Spiegel, Stern)



Top 3 streaming services

Prime	66%
Netflix	58%
Disney+	30%

Monthly spend on
media subscriptions

€68



Hobbies

- / 68% like travelling
- / 41% enjoy working on DIY projects

Base: Households with at least one regional daily e-paper subscription n=253; Readers=200

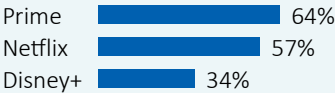


7 media subscriptions
per household (Ø)

21% of households also have
current magazine subscriptions
(e.g. Der Spiegel, Stern)



Top 3 streaming services



Monthly spend on
media subscriptions
€72



Hobbies:

- / 65% like travelling
- / 56% do sport regularly

Base: Households with at least one online
RDN subscription n=135; Readers=104

**Paid online persona —
‘Sporty and health conscious’ type**

Paid online content readers are the most avid media consumers of all our personas, spending €72 a month on seven media subscriptions. They have a very conscious and sustainable lifestyle, and organic products and sport mean a lot to them.



72%

of paid online content
readers are willing
accept limitations
to protect the climate.

55%

buy natural and
organic products.

Study brief

Methodology

Quantitative online survey
of 4,001 online content users
aged 16–69

Field time

August 2022

Agency

Annalect

Germany: Your Home Study



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Newspapers are more significant in times of crisis

The study provides insights into attitudes, the consumer climate and the role of the media.

The high relevance of regional daily newspapers remains unchanged. More than half of readers (52 percent) said that their newspaper has become even more important to them during the COVID-19 pandemic and the Ukraine war. A key reason for this high relevance: 68 percent of readers feel that that regional daily newspapers are a good source of information of during a crisis.

52%

Readers say:

“My regional daily newspaper has become even more important to me during the crises.”

Base: RDN readers n=1,056

A stronger focus on sustainability despite crisis

Consumer behaviour in Germany has become more conscious and sustainable. This is particularly true in the case of regional daily newspaper readers: 79 percent (total: 71 percent) will continue to buy regional products with short delivery routes. Sustainability is an important purchase criterion for 69 percent of them (total: 62 percent). Despite this consciousness, prices became a hot issue for consumers in the second half of 2022.

■ Total ■ RDN readers
(Figures in %)

“I am price conscious and I look for information on special offers.”



“I compare the prices of different bands when shopping.”



“I still treat myself to beautiful things.”



“I do more bulk shops.”



“I prefer to donate money rather than spend it on myself right now.”



“I prefer to buy regional products with short delivery routes.”



“I’m focusing more on sustainability.”



Regional newspapers are important sources of advice

(Figures in %)

“I follow local energy-saving measures with interest.”



“I think the regional tips and recommendations on saving energy are helpful.”



“I feel well informed about current crises by my regional daily newspaper.”



I expect to see tips and advice on saving energy in my regional daily newspaper.”



“I’d like to see money-saving projects in my region (e.g. car sharing, bike leasing).”



Base: RDN readers n=1,056

Topics relating to saving energy and more energy efficiency are gaining in significance as a result of climate change, the transition to renewable energy and energy prices – especially if they have regional significance. After all, regional companies provide the people in their region with heat, power and water. Regional daily newspapers are again valuable advice and information providers in this respect. More than two-thirds of readers (67 percent) expect and look forward to receiving energy saving tips (total: 63 percent).

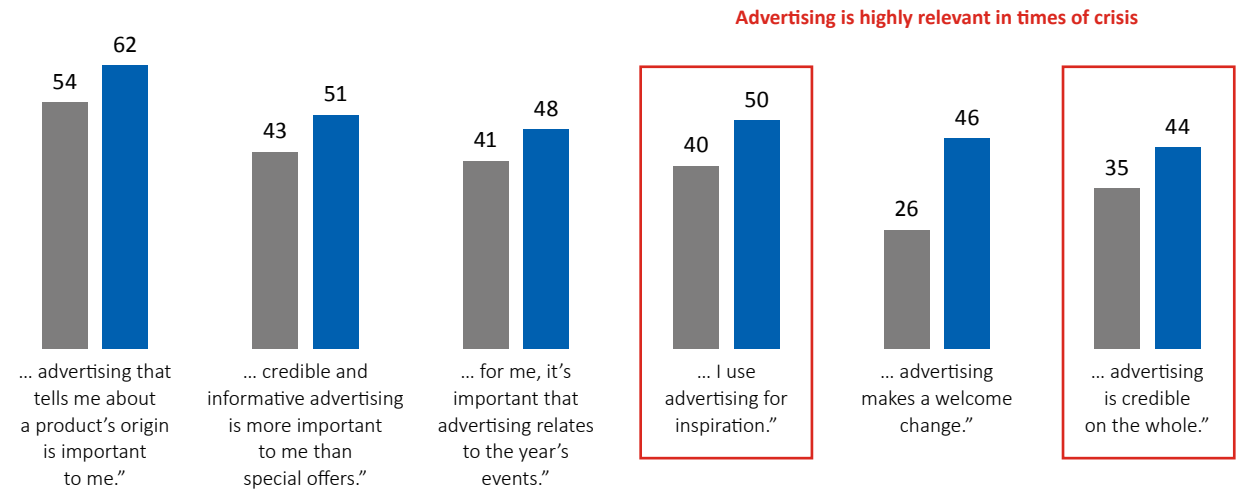


Readers are very interested in informative advertising

(Figures in %)

■ Total ■ RDN readers

“In the current situation ...



Base: Total n=2,012; RDN readers n=1,056

In times of crisis, advertising in regional daily newspapers offers genuine added value to readers. 51 percent of respondents stated that credible and informative advertising is actually more important to them than pure special offers (total: 43 percent). One out of two feels that advertising is a helpful source of inspiration (total: 40 percent). It is increasingly important for advertising to inform readers about product origins and how they are manufactured (RDN readers: 62 percent (total: 54 percent)).

Study brief

Methodology

Representative online survey
of 2,012 people aged 16–69

Field time

August/September 2022

Agency

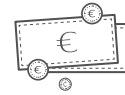
DCORE

Print &
E-paper

Usage & Impact

An increasing number of people are reading the digital versions of their regional daily newspaper. We analyzed the quality of advertising contacts.

What is the advertising impact in the various channels? Does the e-paper generate the same advertising impact as the printed edition? How much attention is paid to supplements? We investigated these and other issues in a multi-stage survey. The result: both the print and electronic versions of regional daily newspapers is considered to be useful and meaningful.



Print

E-paper

48% **43%**

of readers say that they find low price offers in advertisements.

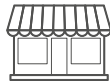


Print

E-paper

52% **47%**

of readers readers particularly notice advertisements placed by regional businesses and companies.



Print

E-paper

52% **49%**

of advertisements help readers to discover **(regional) retailers and services** that they didn't know about.



Print

E-paper

50% **43%**

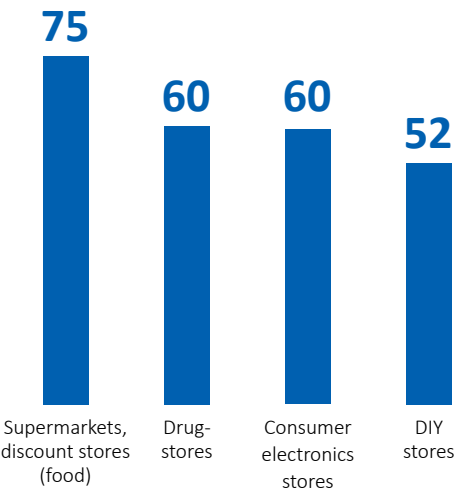
of readers' attention is often drawn to interesting products by advertisements.



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Printed or in an e-paper:
What supplements are you
especially interested in?

(Figures in %)



Base: Supplement users n=1,136

Supplements work
in both channels

Both digital newspapers and digital supplements work. Almost two-thirds of printed newspaper readers (65 percent) look at supplements ‘that interest me’ as compared to half of e-paper readers. Supermarket & discount store, consumer electronics store, drugstore and DIY store supplements are particularly popular.



The study also investigated the advertising impact of digital forms of advertising. Respondents were shown an e-paper with full-page interactive ads – or interstitials. The findings were also very positive: advertising recall and interaction rates were both convincing.

- / Nine out of ten respondents recalled the interstitials and 47 percent of respondents noticed the link outs they contained.
- / 49 percent clicked on the links to access more in-depth information.
- / After reaching the landing pages, 56 percent found the information there to be useful and 52 percent thought the links were helpful and distinctive.

Study brief

Methodology

1. Qualitative one-to-one interviews with 20 RDN subscribers aged 18–69
2. Online survey of 1,515 RDN subscribers aged 15–69
3. Online survey of 466 RDN subscribers aged 18–69

Field time

September–December 2021

Agency

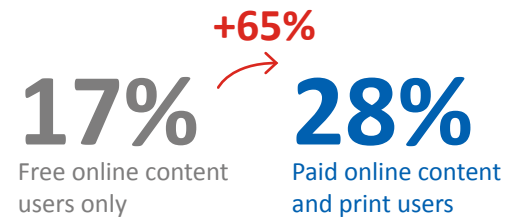
Annalect

Crossmedia

Advertising behind the Paywall

Advertising behind the paywall of regional daily newspapers has more than paid off in an employee organisation's cross-media campaign.

Across all channels: an employee organisation ran a cross-media campaign with print ads, e-paper ads and advertising behind the news site paywalls of regional daily newspapers. Advertising behind the paywall proved to be central to the campaign's success. In fact, use of the news site behind the paywall and the printed edition of the newspaper resulted in significantly higher advertising recall (+65 percent).

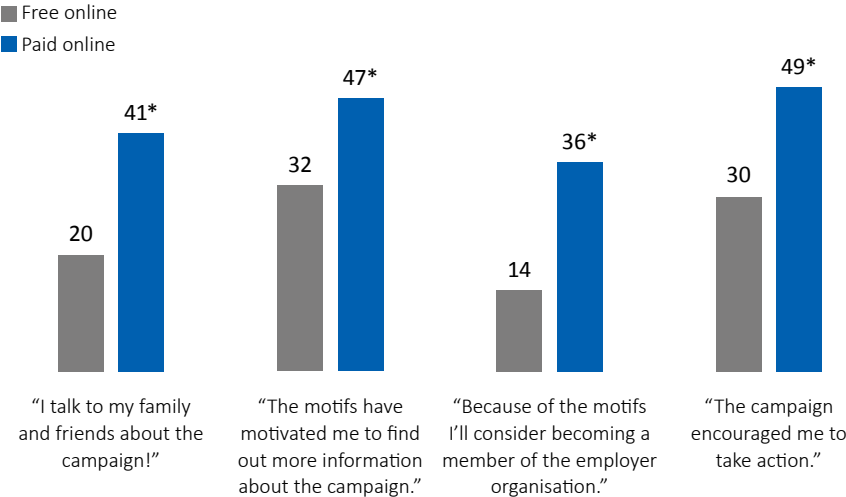


Base: Free online users n=504; Paid online users n=502



Campaign as a talking point

(Figures in %)



Base: Free online content users n=504; Paid online n=502

*Significant difference ($p < 0.05$) vs. control group

Ads in a paid environment result in significant activation levels

Interest in the employee organisation's campaign is particularly high among paid online users. This boosted activation to an even higher level. Almost one out of two paid online content users who recalled the ad intend to follow the campaign. Their willingness to engage is therefore 66 percent higher than that of free online content users.

49%

of paid online content users who recall the ad motifs **intend to follow the campaign's call to action.**

Study brief

Methodology

Quantitative survey
in an online access panel

Target group

Score Media online users aged
18–69 in the campaign region

Sample

Total n=1,006
Paid online users n=502
Free online users n=504

Campaign period

13–19 June 2022

Survey period

17–20 June 2022

Agency

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Discover advertising opportunities behind the paywall here!

Ligne Roset

Interstitial & Digital E-paper Supplements

French designer furniture manufacturer
Le Rendez-Vous Ligne Roset’s campaign had the
goal of improving image, awareness and sales.

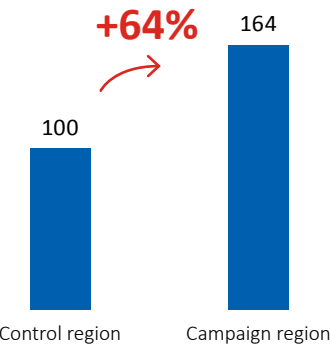
To achieve that it placed an interstitial with link-outs in the e-paper editions
of our regional daily newspaper and a high-quality, informative
supplement in our e-paper. Impact was maximised by only running the
campaign in publications with readerships in areas where the company
had stores. Accompanying research shows that the ad and supplement
are both mutually beneficial and memorable.

21%

“Without the ad I’d
never have noticed
the supplement.”

Base: E-paper users in the campaign region
who saw the ad n=117

Ad-recall increase
by 64 percent



Base: E-paper users control region n=515;
Campaign region n=503



54%

"The ad got me interested in the supplement."

64%

"I think it's useful to link ads to supplements in e-papers."

68%

"Ads provide a good overview in conjunction with supplements providing further information."

Base: Total e-paper users n=1,018

Study brief

Methodology

Quantitative survey in an online access panel

Target group

E-paper users, aged 18–69

Sample

Total n=1,018

Campaign region n=503

Control region n=515

Campaign period

8–14 October 2022

Survey period

13–17 October 2022

Agency

Annalect

31

Readers like the combination of an activating ad and an informative supplement

Both ads were rated very positively, on the whole, and readers appreciate the benefit of the ad being linked to the supplements. The ad activated readers and generated interest in furniture, and the e-paper supplement had a high-quality, modern look and provided informative content, which readers appreciated.



Discover e-paper advertising opportunities here!



Libify

Digital E-paper Supplements

Home emergency alert system provider Libify ran a very successful e-paper supplement entitled 'Safety in Old Age' containing information about its products.

E-paper supplements in regional newspapers activate and convince readers, as emergency alert system provider Libify discovered in its campaign. Contact with the informative and magazine-like e-paper supplement therefore measurably boosted the brand's image. 87 percent of readers who recalled it said they think that Libify products can be trusted. Libify also generated interest for emergency alert services: more than one out of three (37 percent) of respondents said they were planning to buy an emergency alert product as a result of the campaign.



■ Total ■ Respondents with advertising recall
(Figures in %)

"Libify has trustworthy products."



"The campaign has motivated me to buy home emergency alert products."



Base: Total n=755; Respondents who recalled the ad n=93

E-paper supplements generate a high level of advertising recall

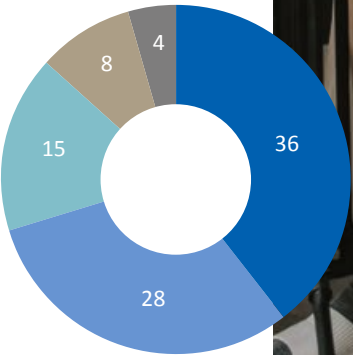
40 percent of readers recall the digital Libify supplement, and recall was as high as 47 percent of readers who are concerned about the issue because they have relatives who require nursing care. Almost all respondents had read or looked at the supplement. Over one-third (36 percent) actually said that they had read the entire supplement. 76 percent of respondents gave the Libify supplement a very positive rating. They particularly liked the fact that the texts and content were easy to understand.

Readers read the supplement

(Figures in %)

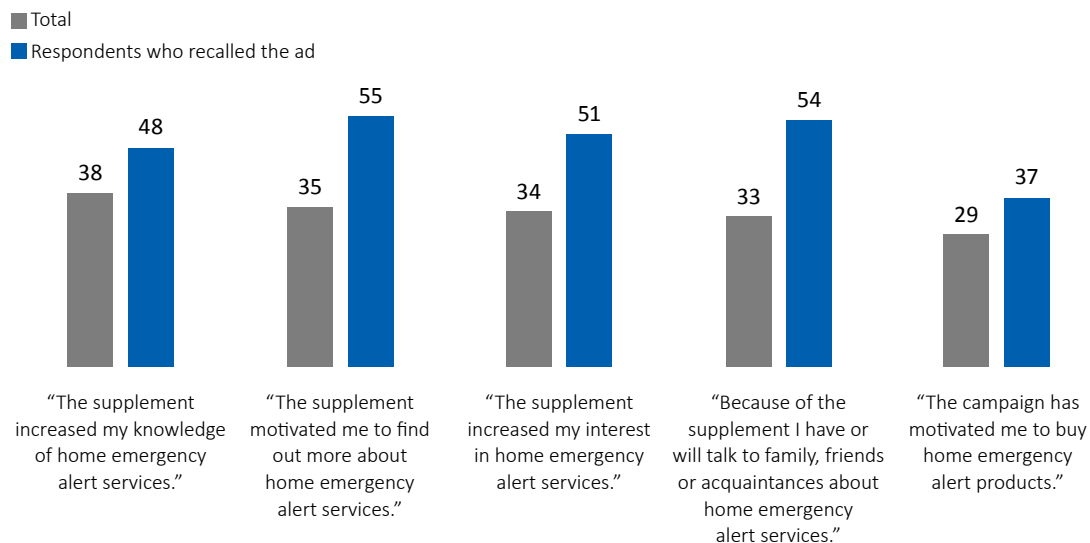
- Read the entire supplement
- Read 3/4 of the supplement
- Read 1/2 of the supplement
- Read 1/4 of the supplement
- Read less than 1/4 of the supplement

Base: Respondents who recognised the supplement n=301



The supplement convinces readers and generates interest for home emergency alert services

(Figures in %)

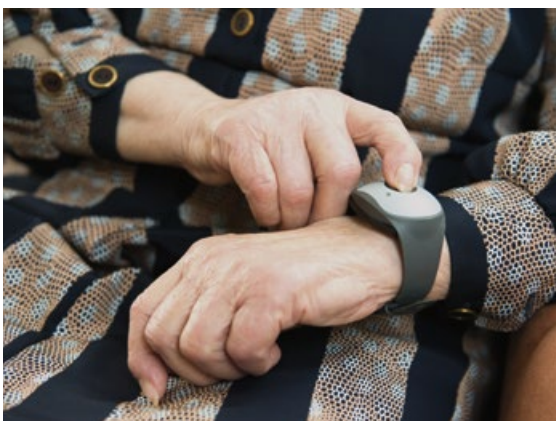


Base: Total n=755; Respondents who recalled the ad n=93

35

Direct access to an attractive target group

An in-depth analysis shows that the e-paper supplement achieved its purpose of reach and activation. More than half of respondents who recalled the supplement said that it had increased their interest in home alert services and that they would like to know more about them. 54 percent decided to talk to family, friends or acquaintances about 'home alert services' as a result of reading the supplement.





36

42%

of readers are concerned that their relatives who require nursing care won't receive timely help in an emergency.

Base: Total n=755



Discover e-paper advertising opportunities here!

The topic of 'home alerts' is relevant to RTZ readers

Summary: The 'Safety in Old Age' e-paper supplement had a positive and reassuring impact on people. More than three quarters of respondents believe that elderly citizens can retain their independence for longer with Libify products. As a result, the supplement has an activating effect on most readers. Libify was able to communicate information (75 percent) and generate interest in home emergency alert products (67 percent).

Study brief

Methodology

Quantitative survey
in the online access panel

Target group

Score Media e-paper users aged
18–69 in the campaign region

Sample

Total n=755

Campaign period

8–15 September 2022

Survey period

12–19 September 2022

Agency

Annalect

Smart Combination

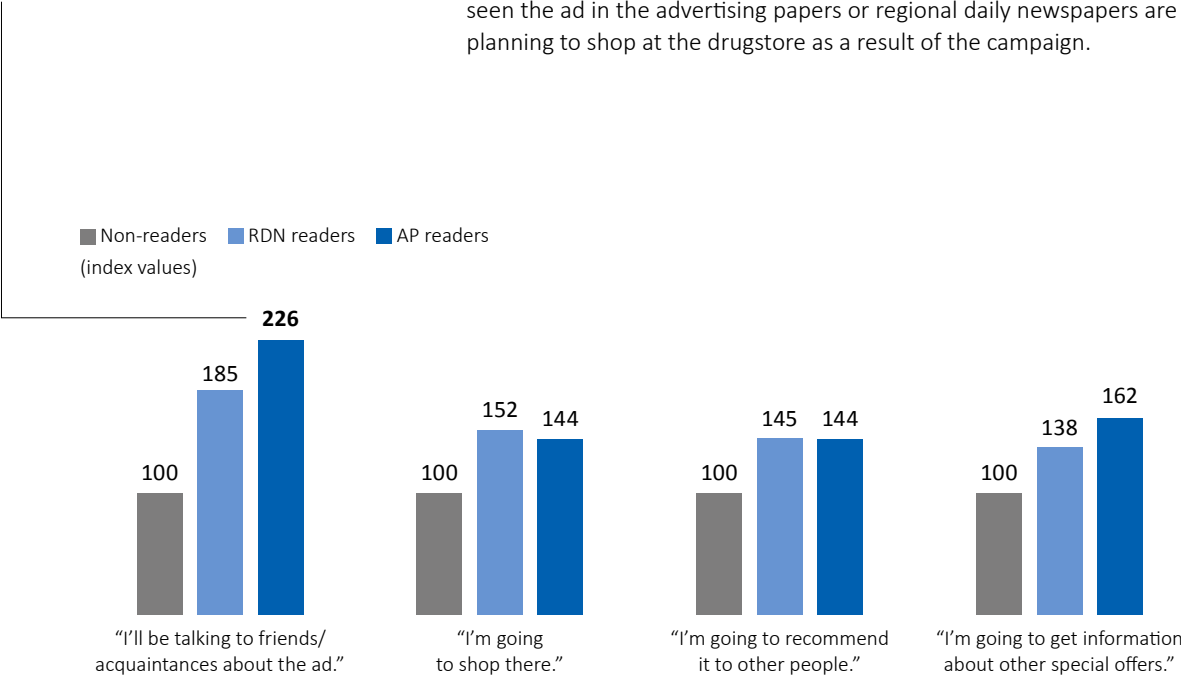
Advertising Papers & Regional Daily Newspaper

“10% off everything sounds like a very attractive offer and because my friends and I often shop at this drugstore chain I’ll be telling them about it!”

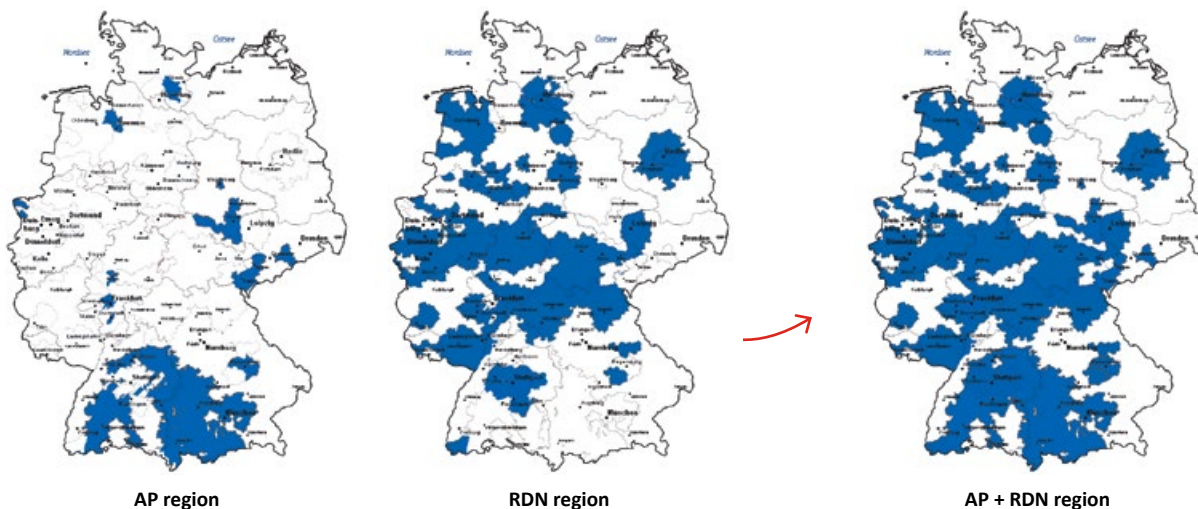
In both environments ads provide clear calls to action, as revealed in research flanking a drugstore chain campaign.

The combination of advertising papers and regional daily newspapers provided the drugstore chain with the desired ad campaign reach. And the best thing was that all the measured KPIs indicated that both genres work equally well. The activation effect was particularly impressive and significantly more than two-thirds of respondents who recalled having seen the ad in the advertising papers or regional daily newspapers are planning to shop at the drugstore as a result of the campaign.

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Base: Non-RDN readers n=252; RDN readers n=498; AP readers n=500



RDN AP
69% 70%

of readers who saw the motif are planning
 to shop at the drugstore chain as a result
 of the advertised discount.

Base: RDN readers n=498, AP readers n=500

To achieve almost one-hundred percent coverage in the regions where the chain's drugstores are located, the campaign ran in both regional daily newspapers and advertising papers. That made it possible to engage with people who aren't reached by the publications we market. In short: The entire relevant region was covered and our customer had a presence in all the places where it operated stores. That's one-stop national marketing deep into the individual regions as far as the letterbox.



*Talk to us about your
 specific plans!*

Study brief

Methodology

Quantitative survey in
 the online access panel

Target group

Score Media readers and non-readers
 aged 18–69 in the campaign region

Sample

RDN region n=750 (498 RDN readers
 on 18 May, 252 non-readers)

RDN region n=750 (500 RDN readers
 on 18 May, 250 non-readers)

Campaign period

18 May 2022

Survey period

18–20 May 2022

Agency

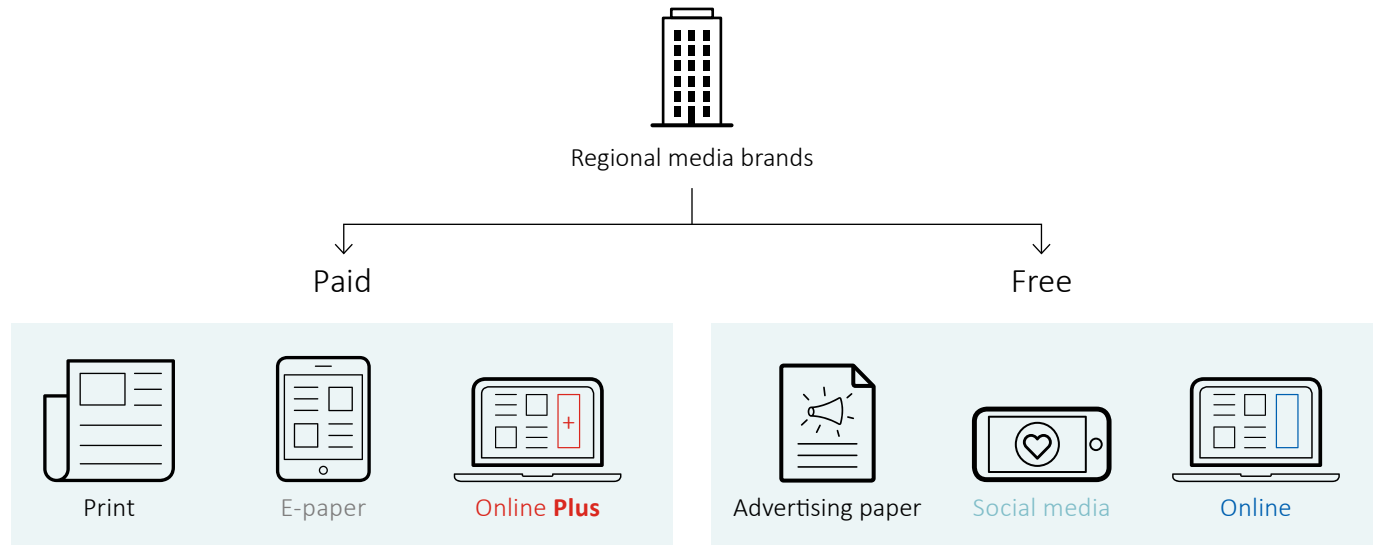
Zeitungsmarktforschung Gesellschaft

Who we are



We provide you with simple and direct access to regional media markets. And we offer a standard price, plenty of scope for ideas and, most importantly, one dedicated contact. After all, we want your campaign to be rolled out in the most targeted way possible to our loyal readership.

Our regional media brand channels



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Our services

- / Strategic advice
- / Central order processing
- / Concept development, creation and editorial support
- / Cross-media planning – e.g. with geo-targeting
- / Advertising media creation
- / Advertising impact measurement and tracking
- / After-sales services
- / Digital ad overview

Your advantages

- / Exclusive, individual and cross-media communication solutions
- / This is as easy as it gets: one dedicated contact and one booking, including regional motif splits
- / Full flexibility: no minimum limits for regions, circulation or booking volume
- / Reduction of costs and resource expenditure
- / Comprehensive digital reporting

Our value proposition

Trust

More than three-quarters of our readers describe their regional newspaper as the expert medium in their region. And even as a little piece of home. This personal relevance is the reason for maximum credibility. In short: the RDN is the ideal, high-quality environment for the communication of your messages.

Precision

We align your campaigns to your regional target groups to generate a sustainable impact. And it makes no difference how big your campaign is: we can provide all services on a one-stop basis to save you time and money.

Dialogue

New inspiration and new ideas come from knowledge sharing. That's why we like to share our knowledge in regular workshops and provide insights into the world of the regional daily newspaper. We also provide training in our GTI planning software.

Reach

Regional roll-outs of national campaigns. Short lead time, fast roll-out and high-reach. Sounds too good to be true, but it's our daily business. With us as your partner you can react spontaneously to current developments and generate large-scale, national reach quickly.

Insights

We want to know what really works. So we constantly collect new knowledge in order to be able to offer state-of-the-art solutions. Naturally, we also substantiate our insights. We measure your campaign performance directly with our pinpointed market research and media analyses.



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