2.7 bn
40% of adult population reads printed newspaper

1.3 bn
more than 40% of Internet users read newspaper in digital form

Source: WPT Analysis, Ipsos, comScore, 2015
$168\text{ bn} \quad \text{Global newspaper revenue 2015}

$100\text{ bn} \quad \text{Global revenue book publishing}

$85\text{ bn} \quad \text{Global revenue movie industry}

$44\text{ bn} \quad \text{Global revenue music industry}

The largest newspaper markets

USA
Japan
Germany
China
UK
India
Brazil

... generate half of global revenue, and 80% of global circulation
Trust

ATTENTION is the OLD currency
TRUST is the NEW ONE
The filter bubble of social media

Social media want to keep you on their platform
They only send you those information, which confirm your areas of interest and your opinions
They reinforce a bias distortion of reality
Social media have the opposite effect of credible media, which bring you all the news, not only those you like
Trusted media organisations are the error correction of the Internet
Total Facebook engagements in the US for top 20 election stories in 2016

*Engagement refers to the total number of shares, reactions and comments for a piece of content on Facebook.
Source: Facebook data via BuzzSumo
Global Digital Circulation Revenue

Million US$

# Snapshot of digital subscription success stories

<table>
<thead>
<tr>
<th>Title</th>
<th>Digital Only Subs</th>
<th>% Subs that are pure digital versus total daily circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>NYT</td>
<td>1,600,000 +</td>
<td>69%</td>
</tr>
<tr>
<td>The Times</td>
<td>185,000 +</td>
<td>44%</td>
</tr>
<tr>
<td>Süddeutsche Zeitung</td>
<td>40,000 +</td>
<td>13%</td>
</tr>
<tr>
<td>Aftenposten, regionals incl</td>
<td>110,000 +</td>
<td>38%</td>
</tr>
<tr>
<td>Le Figaro</td>
<td>60,000</td>
<td>20%</td>
</tr>
<tr>
<td>El Mundo</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FT</td>
<td>566,000 +</td>
<td>75%</td>
</tr>
<tr>
<td>WSJ</td>
<td>1,000,000 +</td>
<td>50%</td>
</tr>
<tr>
<td>FAZ</td>
<td>40,000 +</td>
<td>20%</td>
</tr>
<tr>
<td>Les Echos</td>
<td>31,000 +</td>
<td>33%</td>
</tr>
<tr>
<td>The Economist</td>
<td>303,500 +</td>
<td></td>
</tr>
<tr>
<td>Boston Globe</td>
<td>80,000 +</td>
<td>29%</td>
</tr>
<tr>
<td>Schwäbishe Zeitung</td>
<td>15,000 +</td>
<td>10%</td>
</tr>
<tr>
<td>Amedia (entire group 62 titles)</td>
<td>110,000 +</td>
<td>23%</td>
</tr>
<tr>
<td>Sud Ouest</td>
<td>14000 +</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: WAN-IFRA Global Advisory
Worldwide air traffic +5% p.a.
The fastest growing traffic segment
Global Newspaper Print Circulation

Million Copies

<table>
<thead>
<tr>
<th>Year</th>
<th>Circulation</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>614</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>644</td>
<td>+4.9%</td>
</tr>
<tr>
<td>2014</td>
<td>685</td>
<td>+6.4%</td>
</tr>
<tr>
<td>2015</td>
<td>716</td>
<td>+4.5%</td>
</tr>
<tr>
<td>2016</td>
<td>757</td>
<td>+5.7%</td>
</tr>
</tbody>
</table>

Global Print Circulation Revenue

Million US$

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue (Million US$)</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>79526</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>80089</td>
<td>+0.9%</td>
</tr>
<tr>
<td>2014</td>
<td>80591</td>
<td>+1.0%</td>
</tr>
<tr>
<td>2015</td>
<td>81435</td>
<td>+0.6%</td>
</tr>
<tr>
<td>2016</td>
<td>82204</td>
<td>+0.7%</td>
</tr>
</tbody>
</table>

Global Digital Advertising Revenue

Million US$

<table>
<thead>
<tr>
<th>Year</th>
<th>Global Print Advertising Revenue (Million US$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>79,571</td>
</tr>
<tr>
<td>2013</td>
<td>74,287</td>
</tr>
<tr>
<td>2014</td>
<td>69,190</td>
</tr>
<tr>
<td>2015</td>
<td>63,804</td>
</tr>
<tr>
<td>2016</td>
<td>58,182</td>
</tr>
</tbody>
</table>

Global Newspaper Revenue

Million US$

Global newspaper revenue
2012–2016

Source: WPT Analysis, E&Y, Zenith, PwC Global Entertainment and Media Outlook: 2016-2020
Global Newspaper Revenue

Print 92%

Else 8%

Source: World Press Trends 2017
General Print Advertising Germany

Press Release, German Print & Media Association, 7 Feb 2017, m €

- 2012: 10326 m €
- 2013: 10163 m €
- 2014: 10180 m €
- 2015: 10275 m €
- 2016: 10539 m €
Newspaper Print Advertising Germany

Data: German Print & Media Association, 8 Feb 2017, m €

- 5398 (2011)
- 5017 (2012)
- 4723 (2013)
- 4675 (2014)
- 4668 (2015)
- 4854 (2016)
Who pays for news, and why do people subscribe?

53% of adults pay for news

52% of those who do not subscribe are "news seekers"

Coverage of a specific topic is the No. 1 reason people start subscribing

26% who use a source for free might begin to pay for it

52% of payers subscribe to newspapers

53% of digital subscribers have never paid for a print version of that outlet

Source: American Press Institute
Younger generation is willing to pay

Age distribution for new subscription sales per project
Schibsted Norwegian subscription papers

Source: Schibsted Norway
Winners of the attention economy aggregate largest audiences & capture most of ad revenue

- 64% of global ad revenue
- 89% of all news digital ad spend

Source: WAN-IFRA
Who captures $ in digital ad ecosystem?

Source: AEMII – Future Media Lab / European Magazine Media Association 2016
Successful organisations* consider the following to be high priorities over the next 5 years:

- Events and conferences
- Podcasting, streaming audio
- Special reports
- Web TV, video

*Successful Organisations are both reporting financial growth and are seen to be innovative by their executives.
Successful publishers invest in:

Print Innovation
2) Report on the activities of the World Printers Forum
FLY HIGHER BY PROVING YOUR GREAT COLOR PRINTING

The biennial International Color Quality Club is the only worldwide print quality competition for newspapers and magazines. It is based on objective measurement and the judgment of international industry experts. ISO printing standards are the foundation of the evaluation. The next test period will run until March 2018. Results will be announced in June 2018, and the new club members will be honoured in October 2018 at the IFRA World Publishing Expo in Berlin, Germany.

Motivate your employees and improve the quality awareness of your workforce

Benefit from detailed technical reports that can help optimise production processes

Promote your print quality standards by means of club membership

Collect “stars” and become a member of the exclusive Star Club of the world's best newspaper printers

For the first time the International Color Quality Club is allowing the participation of magazines. The next round of the competition is open to all newspapers and magazines:

- Newspapers that print according to standard (ISO 12647-3)
- Newspapers using dryers or UV systems
- Newspapers with exceptional production conditions (tinted or dark paper, flexographic printing, inkjet printing, etc.)
- Magazines, printed in sheetfed offset, heatset or gravure

Register now one or more publication titles to participate in the International Color Quality Club 2018–2020, and benefit from a free Pre-Check in the autumn of this year.

For more information visit www.colorqualityclub.com or call Manfred Werfel +49 69 24 00 63-281 or Prabhu Natrajan +91 44 42 11 06 40
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Open for all newspapers and magazines

Three test-printing weeks in
January, February and March 2018

Results to be published 8 June 2018

Awarding at IFRA Expo, October 2018, Berlin

Registration status: 84 entries (publications/plants)

Registration closes by end of this year
(1) OPHAL Paper Guide
(2) Print-Online Performance Gap
(3) High-Value Print Production
(4) Lower Grammage Newsprint
Optimised Paper Handling and Logistics

Launch of free digital paper guide on 24 Jan 2017
Promotion: PR, newsletter, flyer, “Business Card”, various presentations
Printed copies at WAN-IFRA India Conference 2017 and at IFRA World Publishing Expo 2017
About 1000 individual user downloads so far
PRINT-ONLINE PERFORMANCE GAP

World Printers Forum Report: A US-only study raises debate
Print-Online Performance Gap

Published in February 2017
Promotion: PR, newsletter, presentations at Publish Asia, WAN-IFRA India and IFRA World Publishing Expo 2017
Printed copies at WAN-IFRA India Conference and at IFRA World Publishing Expo
Most downloaded WAN-IFRA Report this year: 642
High-Value Print Production

Launch at IFRA World Publishing Expo 2017
Three surveys, three interviews, intro from Rick Stunt
Presentations at WPF Conference 2017 and Expo 2017
OPTIMIZING NEWSPAPER PRODUCTION FOR LOWER GSM PAPER

An Optimization and best practice guide
Optimising Newspaper Production for Lower gsm Paper

Draft report available

Oct and Nov: Content and editorial review, proof reading

December: Final layout and page make-up

January 2018: Launch
WPF Conference 2017 was part of WAN-IFRA India conference in Chennai, 12–14 Sept

Sold out with 425 delegates

WPF Conference attracted 250+ delegates
IMPROVED NEWSPRINT FOR HIGH-VALUE PRODUCTS

Anu Ahola, Senior Vice President
News & Retail, UPM Paper ENA
Value Added Opportunities for Newsprinters
What ink/varnish can do to add value to your products
Session 1: Print, the profit centre

11.30 Print - Online Performance gap: A look into the reality of printed newspaper today and in the future.
Manfred Werfel, Deputy CEO, WAN-IFRA, Germany.

11.50 Newspaper printing in a digital world.
Knud Kraft, Head of Production, Axel Springer, Berlin, Germany.

12.10 Learning from book publishing industry, how in spite of digital reach, printed book publishing is flourishing. What are the structural changes book publishing went through and how successful publisher turned it to their advantage.
Bimal Mehta, Executive Director, Vakil & Sons Pvt. Ltd, India.
11.35 Rheinische Post handles the newspaper delivery of not just their copies, but also their competitive titles. Automated MIS and systematic planning approach has helped them to reach the newspaper to the reader on time. A case study.

Michael Kiesswetter, Managing Director, Rheinische Post AdLog GmbH, Germany.
Opening Ceremony
Michael Hirthammer, Sun Chemical
Michael Kiesswetter
Rheinische Post AdLog