

Professional Media Insights Project Final Report

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Executive summary

The reader is at the centre of the generalist news media's strategic decisions. Although advertising remains an important source of income, with the shift to more reader-revenue based business models the reader is becoming more important. Publishers are exploring membership models and are moving from growth metrics to loyalty metrics. In terms of content strategies, there is more attention for user experience and the various ways the reader as user might want to consume or interact with media (on different platforms, in different formats, at different times of the day). Moreover, publishers are looking at ways to expand their businesses beyond news. In addition to technological innovation and training their employees, media organisations are reorganising their work spaces to facilitate chance encounters and collaboration. One of the main challenges for media management is establishing an organisational culture that allows them to change the ways in which they operate, and makes them more flexible to respond to future change.

In the professional media field, the reader seems traditionally more important as there is a clearer link between the publications and their audiences. Although most professional media are present online and offline, across different platforms, their content strategies remain mostly print-driven and text-based. While generalist media are increasingly experimenting with data visualisations, video and infographics, these types of storytelling formats are mostly absent in the professional media surveyed in this study. At the same time, compared to generalist media, it seems like professional publications are going further in the expansion of their activities beyond editorial content. They appear to see themselves more as a service for professionals than as a news publisher. Across the professional publications surveyed, all of them have a mixed business model. The most common revenue sources are reader subscriptions (in combination with individual sales) and advertising. Professional media tend to opt for an innovation strategy based on focusing on what makes them unique.

Case studies of HOPIMEDIA (France), RIBAJ (UK), RUIIMTEVOLK (Netherlands) and Het Nieuwe Instituut (Netherlands) provide examples of different strategies, their benefits and challenges.

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Introduction

Scope of the Report

This report presents an overview of trends and practices in the media sector more generally, and in the professional media sector more specifically. It compares the trends and practices observed in the general media field with those observed in the professional media field. In-depth case studies into a 100% digital and ad-free model, a book-centred content strategy, the shift from being a platform to using external platforms for publication, and the integration of different sector institutes into one physical location offer in-depth insights into different models, their benefits and challenges.

Methodology

The overview of trends and practices in general media is based on reports from leading research institutes and professional organisations in the field of media and journalism, including *WAN-IFRA*, *Reuters Institute for the Study of Journalism*, *American Press Institute*, *Pew Research Center*, *Tow Center for Digital Journalism*, *European Federation of Journalists* and *European Journalism Center*, and websites such as *journalism.co.uk*, *cjr.org* and *niemanlab.org*.

As very little research has been conducted into professional media, the overview of trends and practices in the professional media field is based on original research. I surveyed 38 primarily professional media in the field of architecture, civil engineering and the built environment more broadly, with a primary focus on professionals but with impact beyond professional activities (i.e. they are of interest for society, for instance local, regional or national entities). The professional publications included in the survey reach large audiences in relation to the absolute number of target groups (high number of professionals and large potential interested stakeholders), and provide credible editorial content (communication services are not considered here), requiring full editorial strategies¹.

In addition to the survey, I conducted 6 interviews (1 expert interview to get an overview of trends, practices and the communication channels in the professional media field; 5 practitioner interviews to get more detailed insights into the trends and practices identified in the reports and the survey), and exchanged via e-mail with a number of actors in the professional media field. Some of these interviews also served as the basis for the case studies.

The research is limited to Europe, due to perceived closeness in language and socio-economical situation to Switzerland. France and Germany are included because they are closest to Switzerland in terms of language and culture. I did not include Italy, because I don't speak Italian unfortunately. Belgium is included, because - like Switzerland - they have different language groups, so of interest in terms of positioning and potentially as inspiration for dealing with that. The UK and the Netherlands are included, because I have access and

¹ For a list of professional media included in the survey, see the appendix of this report.

they are generally quite innovative when it comes to new media, so of interest for the 'latest' in trends and inspiring models.

Trends in media – in Europe and Worldwide

This section provides an overview of recent research into the editorial strategies and content, digital-paper relations, audience engagement, main business models, and innovation strategies in the media industry more generally.

Content strategies

Diverse content that users value

With changing business models and new possibilities for creating content, publishers are diversifying their content strategies as well as putting the reader at the centre of their editorial strategies. This means that journalism should not only inform, but also be useful for readers. The *Reuters Institute for the Study of Journalism* concludes in a recent report that the best journalism today is “more accessible, more timely, more informative, more interactive, more engaged with its audience” than ever, as well as more diverse than ever². Increasingly, publishers are speaking about 'content' and 'stories' rather than 'journalism' and 'articles'³.

Different strategies are used to diversify content and increase user engagement, including:

- A shift **from quantity to quality** of content - Especially magazine publishers are focusing on “quality in-depth, long-form content rather than quickly consumable bite-sized nuggets”.⁴
- **Alternative formats** - The Washington Post for example is experimenting with poetry, songs and board games⁵ as a way to make people care more about political reporting.
- **Different tones** - Especially newer actors in the journalism field (e.g. De Correspondent, Netherlands; Mediapart, France) do not shy away from their reporters taking position, suggesting that this doesn't have to conflict with high-quality, investigative reporting.

A specific trend in user-centred and engaging content strategies is constructive journalism or solutions journalism: “rigorous, compelling reporting that includes positive and solution-focused elements in order to empower audiences and present a fuller picture of truth, while upholding journalism’s core functions and ethics”⁶. This fits into strategies aimed at more long-form and contextual journalism.

At the same time, there's increasing interest in uncovering and reporting facts, in the form of

² <https://reutersinstitute.politics.ox.ac.uk/our-research/more-important-less-robust-five-things-everybody-needs-know-about-future-journalism>

³ <http://www.wan-ifra.org/reports/2017/05/17/innovation-in-news-media-world-report-2017>

⁴ <http://www.sheridan.com/magazines-register/what-could-2017-magazine-publishing-trends-mean-for-2018>

⁵ <https://www.journalism.co.uk/news/-when-you-re-surrounded-by-something-constantly-it-stops-surprising-you-the-washington-post-magazine-experiments-with-storytelling-through-poems-songs-and-board-games/s2/a727746/>

⁶ <https://www.constructivejournalism.org/about/>

data-driven journalism and investigative journalism, and fact-checking. This has become easier with the open data movement and the availability of big data tools, and more necessary with the increase of 'fake news'. Science and research are also getting more interest from newsrooms to respond to these challenges⁷.

Audio, video and infographics

With the emergence of digital, a variety of multimedia formats have become available for publishing content online.

In addition to text and images, publishers have increasingly been creating video⁸. However, the *Reuters Institute for the Study of Journalism* finds that users prefer text to video, because of “a perceived loss of control, (...) limited data when on a smartphone and the difficulty of accessing sound on the move”⁹. Videos that do tend to be successful are “short (under one minute), are designed to work with no sound (with subtitles), focus on soft news, and have a strong emotional element”¹⁰.

Publishers have also embraced infographics¹¹. Graphic designers are increasingly involved in creating visual stories together with journalists, while journalists are encouraged to create more basic infographics to accompany their story themselves, with the many tools available.

More recently, there has been an interest in VR applications (e.g. FranceTV¹² with their elections application in which users could interactively discover the programmes of the different candidates, or the New York Times¹³).

And in response to the increasing popularity of podcasts and voice-activated speakers¹⁴, publishers have also started creating audio content¹⁵ (e.g. Zeit¹⁶). The popularity of podcasts seems to be higher in countries with longer commuting times, such as the US and Australia, and lower in countries with a historically strong radio landscape, such as Finland, Germany, the UK and the Netherlands¹⁷.

From social to personal media

As mobile continues to grow¹⁸ publishers continue to adapt their content strategies to mobile

⁷ <https://blog.wan-ifra.org/2018/12/18/new-report-science-in-the-newsroom-2019>

⁸ <http://www.digitalnewsreport.org/publications/2016/future-online-news-video/>

⁹ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

¹⁰ <http://www.digitalnewsreport.org/publications/2016/future-online-news-video/>

¹¹ <http://www.wan-ifra.org/reports/2017/05/17/innovation-in-news-media-world-report-2017>

¹² <https://www.francetelevisions.fr/lab/presidentielle-2017-vr-l-information-immersive>

¹³ <http://www.nytimes.com/marketing/nytvr/>

¹⁴ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

¹⁵ <https://blog.wan-ifra.org/2018/12/20/newsletters-audio-and-personalisation-top-priorities-for-us-newsrooms>

¹⁶ <https://www.zeit.de/podcasts#skip-mark-1>

¹⁷ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

¹⁸ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

use, habits, and formats, e.g. location-based content¹⁹, lock-screen notifications²⁰ and responsive content²¹.

Social media is becoming less important for news distribution. According to the *Reuters Digital News Report*, Facebook and Twitter are losing ground with readers as the algorithms favour certain kinds of content and people become reluctant to share things publicly. In response to this, news publishers are looking for alternatives²².

Personalisation (e.g. The Times of London's James²³) is an ongoing trend in content distribution as well as newsletters²⁴. Publishers are looking to tailor content to the needs of individual users both in terms of types of content and user behaviour (what media they consume when, where and how). With newsletters, media companies are "aiming to maximize reader revenue through retention and engagement"²⁵.

Private media and messenger applications are gaining ground²⁶, including Snapchat, Instagram and Whatsapp. Although mainly in countries where freedom of expression is under threat, and among younger audiences²⁷. At the same time, the *Reuters Digital News Report 2018* observes that "pulling in the opposite direction is the rebirth of email, which is being used as an effective tactic to bring consumers back to news websites directly, but this channel mainly resonates with over 45s"²⁸.

More than content

As noted in the *Innovation in News Media World Report 2018*, publishers are expanding their activities beyond producing editorial content, to include services and service content. Although service journalism has been a common practice in magazine publishing for decades, publishers traditionally focused on news have only recently "begun to explore and invest in service journalism, using their expertise to be useful to readers in their everyday lives, while hopefully bringing in some extra revenue"²⁹.

Partnerships

Challenged by decreasing (human) resources in newsrooms, media organisations are forming partnerships with other media organisations, often ones that are operating in different markets, i.e. that are not competitors. Such partnerships include content-sharing agreements

¹⁹ <http://www.sheridan.com/magazines-register/what-could-2017-magazine-publishing-trends-mean-for-2018>

²⁰ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

²¹ <http://www.sheridan.com/magazines-register/what-could-2017-magazine-publishing-trends-mean-for-2018>

²² <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

²³ <https://digiday.com/media/times-london-turns-digital-butler-named-james-increase-subscriptions/>

²⁴ <https://blog.wan-ifra.org/2018/12/20/newsletters-audio-and-personalisation-top-priorities-for-us-newsrooms>

²⁵ <https://www.inma.org/report-detail.cfm?pubid=199>

²⁶ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

²⁷ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

²⁸ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

²⁹ <http://www.wan-ifra.org/reports/2018/05/27/innovation-in-news-media-world-report-2018>

(e.g. between Poland's Gazeta Wyborcza, The Guardian and Der Spiegel³⁰, between Tamedia's titles³¹), co-production of content (e.g. BNR Questcast³²), collaborative investigation projects (IJC investigations; Implant Files, Panama Papers, Paradise Papers), translation (Le Courrier International, 360 Magazine, Global Voices), partnerships with brands (Elle Magazine with Very³³). Other 'smart saving strategies' include outsourcing content production (e.g. freelancers) and publishing user-generated content on blogs (e.g. blogs on lemonde.fr³⁴).

Digital-print relations

Print is not dead, but less central

Over time, digital has gained importance in media organisations and has become more integrated with the rest of the news operations (a process generally referred to as *convergence*). Where online newsrooms used to be housed in separate buildings or at least on separate floors, they are now often part of the same newsroom.

Online content has matured and is taken seriously in most media organisations today. In many organisations, online has become the primary channel driving the editorial and content strategies while “traditional logic and rhythms of daily newspaper production are losing ground”³⁵, as reflected in the shift from 'newspaper-centric' to 'online-first' or 'digital-first' newsrooms.

Some newspapers have opted for a digital-only model (e.g. The Independent³⁶), although this seems rare. Print is still more widely circulated and a digital-only editorial strategy would mean massive cuts in staff as well as advertising revenues³⁷.

Although it has become less central to the editorial strategies, print is not dead³⁸: “Print still draws strong audiences in art, travel, and lifestyle titles as people like the sensory experiences that glossy, colorful, tactile printed pages deliver.”³⁹ Interestingly, some newcomers to the journalism field are print-only or print-driven publications (e.g. RevueXXI, France; Le Un, France; 360 Magazine, Netherlands). The print-only titles are often specialised or unique, either in terms of format or content.

³⁰ <http://www.wan-ifra.org/press-releases/2014/10/14/world-publishing-expo-opens-with-call-to-come-together-to-solve-industry-s>

³¹ <http://www.wan-ifra.org/articles/2016/04/29/swiss-dailies-move-to-common-methode-platform>

³² <http://www.bladendokter.nl/bnr-en-quest-starten-samen-podcast/>

³³ <https://whatsnewinpublishing.com/2018/01/transformation-and-trust-why-2018-promises-to-be-a-page-turner-for-magazine-publishers/>

³⁴ <https://www.lemonde.fr/blogs/annuaire/>

³⁵ <https://www.tandfonline.com/doi/abs/10.1080/17512786.2014.885678?src=recsys&journalCode=rjop20>

³⁶ <https://www.independent.co.uk/news/media/press/the-independent-becomes-the-first-national-newspaper-to-embrace-a-global-digital-only-future-a6869736.html>

³⁷ <http://mediashift.org/2017/01/are-newspaper-publishers-ready-digital-not-quite/>

³⁸ <http://www.wan-ifra.org/reports/2017/05/17/innovation-in-news-media-world-report-2017>

³⁹ <http://www.sheridan.com/magazines-register/what-could-2017-magazine-publishing-trends-mean-for-2018>

Audience relations

From 'audiences' to 'communities' and 'members'

With the shift from ad-revenues to more reader-revenue based business models, publishers are looking to develop and maintain closer and more direct relations with their readers. Engagement is considered a key factor in driving reader revenues, as audience relationships are considered a key element in developing reader's willingness to pay (see also the *Membership Puzzle Project*⁴⁰ and the recently launched *EJC Engaged Journalism Accelerator*).

'Listening'⁴¹ seems to have replaced 'commenting' in articles and reports on user engagement. Many media organisations have shut down the comment sections on their websites⁴² as online audiences grew and hate speech and trolls became more prevalent, and are looking for ways to find out what readers want.

Methods for listening to readers include hosting monthly meetings (e.g. Journal Star, United States⁴³), involving readers in the research process (e.g. ProPublica, United States; De Correspondent, Netherlands; Vox, United States⁴⁴), and organising focus groups and live events. At the *EJC News Impact Academy*, media professionals explored “how we can make our newsrooms more diverse in order to better reflect our audiences, explored crowdsourcing examples and techniques, and brainstormed approaches for connecting not just journalists to audiences, but also connecting groups of people to each other”⁴⁵.

Meaningful metrics

Alternatively, publishers rely on data analytics to find out what readers want. The type of metrics that newsrooms are interested in has shifted away from what are sometimes referred to as 'vanity' metrics. As reader revenue is becoming a more important part of the revenue mix, “newsrooms are increasingly looking more at metrics that indicate reader loyalty, and less at those such as page views, which are more relevant for an ad-supported model”⁴⁶. Such loyalty metrics include time spent on the page, number of returning visitors and newsletter subscribers. The *Innovation in News Media World Report 2017* already noted a shift from single (e.g. page views, scroll depth, time on page) to combined metrics and the relationships between them.

⁴⁰ <https://membershippuzzle.org/>

⁴¹ <https://www.americanpressinstitute.org/publications/how-a-culture-of-listening-strengthens-reporting-and-relationships/>

⁴² <https://www.wired.com/2015/10/brief-history-of-the-demise-of-the-comments-timeline/>

⁴³ <https://www.americanpressinstitute.org/publications/how-a-culture-of-listening-strengthens-reporting-and-relationships/>

⁴⁴ <https://www.vox.com/health-care/2018/12/18/18134825/emergency-room-bills-health-care-costs-america>

⁴⁵ <https://medium.com/we-are-the-european-journalism-centre/learning-how-to-listen-insights-from-the-news-impact-academy-on-community-engagement-df8f804c8817>

⁴⁶ <http://www.wan-ifra.org/reports/2018/05/27/innovation-in-news-media-world-report-2018>

Business models

Reader-centred business models

The *Reuters Institute for the Study of Journalism* observes a “renewed push to persuade consumers to pay directly for online news through subscription, membership, donations or per-article payments”⁴⁷ across the news industry. In Europe, this works especially well for countries like Norway (30%), Sweden (26%) and Finland (18%), that have “a small number of publishers who are relentlessly pursuing a variety of paywall strategies” and “the added benefit of coming from wealthy societies that value news, have a strong subscription tradition, and where language and the small size of their market protects them from foreign competition.”⁴⁸

Different studies suggest that readers are willing to pay for original and unique content. They are more likely to pay for “specialist and exclusive content, evergreen content, and content that offers plurality of views and perspectives”⁴⁹ and when they feel they cannot “get the specific format for free elsewhere”⁵⁰.

As different types of readers have a different willingness to pay and for different kinds of content⁵¹, publishers use different strategies to get different types of readers to pay for content. The *Innovation in News Media World Report 2017* notes that there are “niches within niches”⁵².

As such, pay-walls come in different varieties, including the hard pay wall, hybrid paywall (e.g. *AftenPosten*), dynamic paywall (e.g. *Wall Street Journal*), and the customisable paywall (e.g. *Hearst newspapers*, *SudOuest* with *POOOL*): “readers would see different subscription offers depending on what they read and how frequently they visited”⁵³.

Increasingly, publishers are looking at developing *membership models* rather than *subscription* models, which implies a feeling of belonging, a shared experience and the ability to identify with other members. Also, “there is more fertile ground among magazine audiences, where there are more obvious common themes than in the news agenda, but this is still in its infancy”⁵⁴. The *Tow Center* notes that “one of the major challenges in creating a sustainable membership program is finding participation activities that are both of interest to members and valuable to the publication”⁵⁵.

⁴⁷ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

⁴⁸ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

⁴⁹ <https://innovation.media/newswheel/how-to-migrate-from-ads-to-reader-revenue>

⁵⁰ <https://www.journalism.co.uk/news/what-makes-readers-pay-for-online-news-/s2/a731497/>

⁵¹ <https://www.americanpressinstitute.org/publications/reports/survey-research/news-subscriber-types/single-page/>

⁵² <http://www.wan-ifra.org/reports/2017/05/17/innovation-in-news-media-world-report-2017>

⁵³ <http://www.wan-ifra.org/reports/2018/05/27/innovation-in-news-media-world-report-2018>

⁵⁴ <http://www.wan-ifra.org/reports/2017/05/17/innovation-in-news-media-world-report-2017>

⁵⁵ https://www.cjr.org/tow_center_reports/guide-to-audience-revenue-and-engagement.php

In its 2018 report, the *Reuters Institute for the Study of Journalism* pays special attention to crowdfunding and donations (e.g. The Guardian) as a potential revenue source, and concludes that they will “work better for a generation that likes to access multiple sources on multiple devices”⁵⁶. Moreover, platforms like *Blendle* and *AppleNews* - and more recently similar platforms based on Blockchain technology – have introduced micro-payments as a revenue source for media publishers and freelancers. Although this seems to primarily benefit the platforms, with little or no extra income for publishers⁵⁷.

New forms of advertising

Although there is a shift towards more reader-driven revenue streams, “the majority of online news consumption still happens through free websites, largely supported by advertising (or through public subsidy)”⁵⁸.

As print advertising revenues in the media industry have dropped steadily over the past years and rising digital ad-spending is mainly swept up by Google and Facebook⁵⁹, variations on the traditional advertising models are popping up, such as branded content/native advertising⁶⁰, targeted/personalised advertising, programmatic advertising, and sponsorship.

However, ad-models favour large audiences, and although publishers experiment for example with Publisher-Ad alliances⁶¹ to scale up, it remains a challenge to compete with the audience numbers of major internet platforms.

Alternative revenue streams

Alternatively, publishers are looking to diversify their sources of revenue⁶². Most business models in the media field are mixed models, “including advertising, corporate underwriting, foundation funding, article syndication, events, affiliate programs, merchandise, and book sales – in addition to or instead of direct revenue from audience”⁶³.

New entrants to the journalism field in particular are experimenting with alternative revenue streams other than paywalls, including theatre performances (e.g. Zetland, Denmark; LiveMagazine, France), book publishing (Mediapart, France; Correspondent, Netherlands), a speakers agency (e.g. De Correspondent, Netherlands), and licensing their tools (e.g. LocalFocus, Netherlands). Some of these outlets are completely ad-free, but profitable (De Correspondent, Netherlands; Mediapart, France).

⁵⁶ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

⁵⁷ <https://blog.wan-ifra.org/2018/07/09/digital-kiosks-struggling-to-keep-european-publishers-on-board>

⁵⁸ <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf?x89475>

⁵⁹ <http://www.wan-ifra.org/press-releases/2018/10/04/world-press-trends-2018-report-measuring-the-value-of-trust>

⁶⁰ <http://www.wan-ifra.org/reports/2018/12/11/native-advertising-trends-in-news-media>

⁶¹ <http://www.wan-ifra.org/reports/2018/05/31/publisher-ad-alliances-why-they-make-sense-and-how-they-work>

⁶² <https://www.theguardian.com/media-network/2017/jan/30/reinvention-publishing-media-firms-diversify-survive>

⁶³ https://www.cjr.org/tow_center_reports/guide-to-audience-revenue-and-engagement.php

The *Innovation in News Media World Report 2018* observes examples of providing software (Washington Post, Svenska Dagbladet, Quartz, the Atlantic), data brokerage (ProPublica, and Schibsted), affiliate marketing (National Geographic). More generally, service journalism allows media organisations to capitalise on their “trusted, reliable brands to make valuable recommendations and suggestions, and offer practical advice, that will help their audiences to make decisions about a variety of aspects of their lives”. Media offer readers content they can use in their daily lives, with the opportunity of getting a commission if the reader buys a recommended product (e.g. The New York Times, Quartz). This does come with a challenge of maintaining editorial independence and the potential impact of such partnerships on the image of the brand is yet unclear.

Innovation strategies

Technology, training and collaboration

Innovation activities include developing and/or adopting technologies, training employees, collaborating with universities, students, startups and other sectors to develop new ideas and a different mindset, that addresses the trends identified above. In terms of innovation, the user-centred strategies of media organisations are reflected in a rising interest in design thinking methods to develop tools, editorial formats and services.

According to *Innovation in News Media World Report 2018*, the key tech developments are in Blockchain (for trust, e.g. SudOuest), AI (for insights, faster production of news, e.g. AP; for automated content, e.g. Reuters), chatbots (e.g. The Washington Post, The Guardian), progressive web apps (e.g. The Financial Times, Wired, The Washington Post) and voice (APA, The Economist, BBC News). With the increased commercial success of voice-activated speakers, the *Reuters Institute for the Study of Journalism* finds that 43% of the people in their study use it to access news in some way.

Innovative spaces

The physical set up of newsrooms and media organisations is being reconsidered in an attempt to better integrate different departments and the flow of ideas between them. Whether by moving to new buildings (e.g. Globe and Mail, Canada), creating 'open-space' newsrooms to encourage chance encounters and collaboration (e.g. New York Times, United States; the AP, United States), or creating media innovation labs.

Media organisations are hiring or appointing growth editors (e.g. BBC), bringing in start-ups to their organisations (e.g. SudOuest, France; Nordjyske Medier, Denmark; FranceTV), or working with universities to facilitate innovation. Both in terms of developing new products, as well as changing the mindset in their organisations. Developing an organisational culture that's open to innovation is one of the main preoccupations, to fight the nay-saying that's traditionally haunting newsrooms. At the same time, the *European Journalism Centers* finds that “Attempts to combat the stagnating newsroom culture are received with mixed feelings: Some organisations have created or partnered on incubators that specialise in developing

these frameworks, but they sat a long way from the editorial floors”⁶⁴.

Changing the organisational culture

As part of the Media Innovation Mapping project⁶⁵, we found that the growing number of Media Innovation Labs around the globe is trying to combat this by training employees, organising events where people from different departments or organisations collaborate, and using a variety of channels to communicate about the innovation efforts going on within the company. Moreover, 'entrepreneurial journalists' are more and more common in newsrooms (e.g. Seattle Times⁶⁶).

Despite these attempts, innovation within media organisations remains “one of the biggest current challenges for newsroom managers”⁶⁷. WAN-IFRA World Press Trends 2018 also found that the single most important change news organisations wanted to achieve in 2018 was a culture change.

Innovation at smaller organisations

Innovation is different for larger and smaller organisations. The EJC suggests that smaller organisations are doing great in terms of innovation that increases engagement, while they don't do much on tech innovation. Researching audience engagement preceding the launch of the *EJC Engaged Journalism Accelerator*, they found that “news organisations that are doing engaged journalism in Europe tend to be smaller and they are not always the ones we get to read about. The way they innovate rarely translates into pioneering the newest tools or technologies. Instead, their innovation is often about creatively adapting ‘traditional’ resources, such as texting and events, in order to serve the information needs of their communities.”⁶⁸

⁶⁴ <https://medium.com/we-are-the-european-journalism-centre/why-european-journalists-struggle-to-engage-with-their-communities-73efbb4465ba>

⁶⁵ <https://media-innovation.news/media-labs/>

⁶⁶ <https://digiday.com/media/seattle-times-empowering-reporters-drive-subscriber-growth/>

⁶⁷ <http://www.wan-ifra.org/reports/2018/05/27/innovation-in-news-media-world-report-2018>

⁶⁸ <https://medium.com/we-are-the-european-journalism-centre/70-european-news-organisations-that-will-inspire-your-community-engagement-work-b1ef57b53a3a>

Professional media trends and practices

Print-digital relations

Across platforms, but print-driven

While all professional publications surveyed started with and are today primarily organised around their print editions, most of them are present across platforms, both online and offline.

With some exceptions where they stopped publishing a print edition (e.g. La Pierre d'Angle, France), the large majority of the publications surveyed continue to publish in print. Some have recently created new print products (e.g. the RIBA J Products in Practice series, United Kingdom; Deutsche Bauzeitung db-Metamorphose).

Some of the reasons mentioned for why print is not dead are its continued importance for advertising sales, and the fact that professionals spend their working days in front of computer screens, thus enjoying reading paper when they are not working.

Alternative channels that address these two points are being explored, such as podcasts (e.g. RIBA J, United Kingdom).

Other platforms and channels that are used for content distribution:

- Website (almost all of the publications surveyed have a website; a few don't use that website to publish content, but as a portal/window to refer to the print editions)
- Social media (Mainly LinkedIn, Twitter, Facebook; to a lesser extent YouTube; and exceptionally Instagram and Pinterest)
- Newsletters (most of the publications surveyed publish newsletters)
- Hybrid print-digital formats (e.g. print magazine as PDF, e-paper or downloadable personalised magazine)
- Applications (e.g. Deutsche Bauzeitschrift, Germany; Cobouw, Netherlands; this is quite rare though)

Content strategies

Diversity of content strategies

I identified a number of content strategies in the descriptions/mission statements of the professional publications surveyed, by looking at their content and communication channels, and through e-mail exchanges and interviews.

Mainly:

- Update (headlines, news, revelations)
- Useful information (legislation, practical advice, service content, reports of events and exhibitions)
- Education (tutorial videos, webinars)
- Background information (in-depth, research, investigation, analysis, interviews, reports, features)
- Entertainment (fun, relaxing content, informative but does not feel like more work)
- Engagement (reader contributions)
- Debate (expert viewpoints, blogs, columns, opinion, space for discussion online, future, ideas)
- Inspiration (future, latest trends, experimental practices, ideas, best practice cases)
- Socially engaged (link between built culture and politics, societal trends, ecology)

There are differences in content strategies between the different channels of a publication. In terms of publishing frequency, newsletters and online content are published more regularly (daily, weekly) than print content (monthly, bi-monthly, quarterly).

There seems to be a relation with the publication frequency of content on the different channels:

Update (news, announcements, what's new – daily; website, social media, newsletters)

- Briefing (“best of..” – weekly; newsletters)
- Information (background, inspiration, analysis - monthly; website, print magazine)
- Dossiers (thematic, discipline-specific, research results – irregular, sometimes sponsored; newsletter, print magazine, special issues)
- Activation/Marketing (call for participation in activities, surveys or events, call to subscribe - irregular, sometimes sponsored; social media, newsletters)

Mostly text-based

Although the transmedia publishing strategies allow for more use of video, audio, visual and other formats, the professional publications surveyed primarily publish text.

In the publications surveyed there seems to be limited use of non-textual materials other than still images. A number of the publications surveyed more or less recently started a YouTube channel, although the number of views of the videos does not indicate a great popularity of this type of content among their readers. One exception I encountered is one platform (B1M⁶⁹), that's dedicated entirely to videos about construction.

While generalist media are increasingly experimenting with data visualisations, video and infographics, these types of storytelling formats remain mostly absent in the professional media surveyed in this study.

⁶⁹ <https://www.theb1m.com/>

Beyond editorial content

About half of the content published by the publications surveyed - and in some cases more - is service content rather than pure editorial content. This includes databases, repositories (mainly jobs, products, and projects) and announcements, but also practical editorial content.

The readers of the RIBA Journal are increasingly interested in practical editorial content, down to the most everyday details such as how other firms work, where everyone is sitting in their offices, and how they acquire new assignments. Similarly, Deutsche Bauzeitschrift has changed its content strategy to focus on building practices: How projects come together, who does what with whom, the challenges in the planning and building process, etc.

Other activities initiated or developed by the publications surveyed include:

- Events (Round-table discussions, workshops, fairs, seminars, award shows)
- Services (Project management, communication)
- E-commerce (Books, software, merchandise, publications)
- Quality control/encouragement/recognition (Awards, rankings)

Compared to general media, it seems like professional publications are going further in the expansion of their activities beyond editorial content. They appear to see themselves more as a service for professionals than as content producers.

Focus

Some of the publications either have an international presence (e.g. Topos Magazine, Germany) or express international ambitions (e.g. RIBA Journal, United Kingdom). Others have recently decided to focus on stories closer to home (e.g. Deutsche Bauzeitschrift, Germany) or have moved away from their international ambitions (e.g. RUIIMTEVOLK, Netherlands).

The internationally oriented publications also 'focus' in their content strategies, although to a lesser extent. Like Deutsche Bauzeitschrift that creates each of its magazines around a specific theme, Topos Magazine publishes mono-thematic issues. RIBA Journal puts books at the core of its editorial strategy, taking advantage of the experience of its new Publishing Director with book publishing specifically.

Reader relations

Reader, client or partner?

I identified different types of reader relationships, varying in terms of the closeness with and involvement of the readers in the publication:

- as reader (subscriber)

- as client (target audience for advertiser, buyer of services/products sold by publication, e.g. tickets to events or products from web-shop)
- as supporter (donations, supporting the mission of the publication)
- as community (contributor, interviewee, featured in article)
- as partner (contributor, part of the editorial team, expert)

In terms of reader as community, New Civil Engineer is an interesting example that's creating content with the community, for the community. They work with contributing authors, publish interviews with clients and SMEs, and conduct surveys among the professionals reading their publication. Recently, for example, they sent a survey to 1000 practising civil engineers, and asked them to consider how they design steel to concrete connections⁷⁰. Then they wrote articles about that for the website.

Struggle to connect with readers

Not all publications manage to connect with their readers in the way they would want to.

Deutsche Bauzeitschrift would like to connect more with its readers, but struggles to do so. As they don't receive any feedback from their readers other than cancellations, they try to exchange with readers they know personally when they meet them. They also have an advisory board that comes together twice a year, and based on those conversations they sharpen our topics. In addition, they use social media to establish a connection. Any direct feedback on their content on Facebook is considered in the creation of the magazine.

Although originally created as a knowledge platform for professionals, RUIIMTEVOLK has moved away from its community-centred model and is currently looking for a publisher to buy NL Magazine. They felt like there was less and less interest from the community to exchange and contribute to the publication.

Keeping those who pay happy

Although Deutsche Bauzeitschrift would like better relationships with their readers to get feedback and be able to further sharpen the profile of the magazine, the clients are happy with their work. And as long as they are happy, DBZ will remain in black figures.

In the end, those who pay, need to be happy. But 'those who pay' are not necessarily your readers. In the case of Deutsche Bauzeitschrift, it's their clients. DBZ gets the majority of its income from its clients. Clients used to buy advertising, but are now increasingly interested in corporate publishing, symposia, and other kinds of events.

Other clients could be institutions, sponsors, funds, or organisations.

⁷⁰ <https://www.newcivilengineer.com/latest/survey-designing-steel-to-concrete-connections/10035618.article>

Outside of the built environment, professional media like Contexte.com⁷¹ and Hospimedia⁷² generate the majority of their income from institutional rather than individual subscriptions. A collaborative study by a number of leading organisations in journalism research conclude too that “a subscription strategy can work especially well for publications with strong institutional audiences in specific industries and when subscribers’ employers can pay the cost of work-relevant media.”⁷³

Business models

Diversification

Across the professional publications surveyed, all of them have a mixed business model. The most common revenue sources are reader subscriptions (in combination with individual sales) and advertising.

Advertising takes on different forms, including:

- Sponsored content (articles, newsletters, advertorials)
- Sponsored activities (events, workshops, tutorial videos)
- Programmatic/targeted advertising

Subscriptions or individual sales prices average on 20 euros per issue (mostly varying between 10 and 30 euros per issue, with some exceptions; also in relation to the format of the publication).

In some cases, the print content is free (e.g. NL Magazine, Netherlands), although this is extremely rare. In most cases, the online content is free. A few exceptions have semi-hard (e.g. RIBAJ, United Kingdom) or hard paywalls online (e.g. New Civil Engineer, United Kingdom; Cobouw, Netherlands).

Publications are also experimenting with other revenue streams, connected to the events, e-commerce, and service activities they are developing (see section 'Beyond editorial content'). In some cases, donations are one of the revenue streams, although this is rare.

Business models are a more or less urgent issue depending on the organisational context of the publication. Not all of the associative publications are supported financially by their associations. RIBA Journal for example does not receive any financial contribution from its association RIBA, and has a sales team that needs to generate enough income through commercial activities (subscriptions, books, advertising) to

⁷¹ <https://www.contexte.com/>

⁷² <http://www.hospimedia.fr/>

⁷³ A collaboration between the Columbia Journalism Review, the [Tow Center for Digital Journalism](https://www.cjr.org/tow_center/how-to-decide-between-subscription-membership-donation.php), the [Membership Puzzle Project](#), and the [Institute for Nonprofit News](#): https://www.cjr.org/tow_center/how-to-decide-between-subscription-membership-donation.php

cover the costs of their own salaries, the salaries of the editorial team and the operational, production and distribution costs of their publishing activities.

Scale

Across the professional publications surveyed, many are published by commercial publishing houses that publish many titles (from 6 to 70), often in a variety of professional domains. Some of the associative publications are published by such a publishing house (e.g. Deutsche Bauzeitschrift, Germany; New Civil Engineer, United Kingdom).

At a smaller scale, at the RIBA Journal this is visible in the closer integration of the publishing activities (RIBA Journal, Books) with the association (RIBA). This allows for more effective sharing of the expertise that's present across the organisation, for example in terms of their online activities.

Innovation

Expansive innovation

Editorial innovation at RIBA Journal comes for example from the strategy days they organised last September 2018 and January 2019. These strategy days aim to expand the activities of the publication. Everyone in the department (28 people) was invited to give a 15 to 20 minutes presentation on their area of expertise. Many of the new editorial formats that they started doing recently – such as a series on architecture schools, and a place-based series - came out of the strategy days.

Focused innovation

On the other hand, Deutsche Bauzeitschrift took three years to reconsider its USP, rethink its content strategies accordingly, and design a new lay-out to match the content strategy. Similarly, the relaunch period at RUIIMTEVOLK lasted about four years, resulting in the decision to let go of the publication NL Magazine, and focus on their consulting activities. By taking time to strengthen their own identity instead of trying to please everyone else, RUIIMTEVOLK now has a much clearer profile and a specific methodology as their USP.

Case Studies

HOSPIMEDIA (FR) - 100% subscription funded, by institutions

Serving decision-makers in the medical field without having close or direct relationships with readers.

HOSPIMEDIA was created in 2002 as an independent, online professional magazine. The website with practical information and news essential for decision-making is accompanied by a daily morning briefing by email, meant to save decision-makers precious time. 70 000 professionals read HOSPIMEDIA, through the 3 000 institutions across the health sector that are subscribers. These include healthcare institutions, companies, professional associations, educational institutions and sector institutions. They have 24 649 followers on Twitter, 8 171 likes on Facebook and 6 206 subscribers on LinkedIn⁷⁴.

HOSPIMEDIA is fully funded through institutional subscriptions that are priced on a case-by-case basis, depending on the size and nature of the institution. Professional organisations can request a 7-day trial period on the website. The online-only, ad-free model was a deliberate alternative to the existing offer at the time (mainly print, ad-dependent). It aimed to anticipate decreasing advertising revenues, and saw digital-only as a way to be more reactive than print. Although HOSPIMEDIA is not against paper, a print edition never actually emerged as a need since the launch in 2002. The model was inspired by AEF, which is a professional news agency in France covering five domains⁷⁵.

Information services

HOSPIMEDIA is strongly service-oriented and covers on a daily basis how the professional field is changing. Its founders realised the field was very complex and changes were hard to follow because of the many dispersed information streams. They decided to create a publication that focuses on everything that's organisational, managerial, political and regulatory in the medical field. They don't cover any medical information.

Over time, HOSPIMEDIA has become HOSPIMEDIA Groupe, offering other services for professionals in addition to the publication. HOSPIMEDIA Nominations offers a database that tracks transfers of decision-makers in the health sector. Profil Medecin, Staffsente and Staffsocial⁷⁶ are employment websites, each focused on specific types of professions across the sector. And Teamsquare⁷⁷ is an application that allows users to easily substitute staff in the case of absence. Most recently, they launched Hospimedia Réponse

⁷⁴ dd. 22 April 2019; +500 on Twitter and +200 on Facebook since February 2019.

⁷⁵ <https://www.aefinfo.fr/groupe-aef>

⁷⁶ <https://www.hospimedia-groupe.fr/profil-medecin-staffsante-et-staffsocial/>

⁷⁷ <https://www.hospimedia-groupe.fr/teamsquare/>

Expert⁷⁸. This service allows managers in the health sector to ask experts for legal advice. The experts respond within 72 hours, for a decent price.

HOSPIMEDIA has a lot of indirect competition, and continues to invest in developing its services to anticipate the competition becoming more direct. As such HOSPIMEDIA is an example of an ambidextrous organisation, integrating exploitation and exploration. When investing in new services, HOSPIMEDIA focuses on its core: paid information services that have added value for the readers. New services are created out of a need, and piloted by the Business Units. In the case of HOSPIMEDIA nominations, readers said 'you cover all the transfers in the big structures, but we're also interested in smaller structures'. The commercial team then called a panel of subscribed institutions and asked for feedback on the idea for a database. Based on the input, they developed the content and features. Every service has its own 'life' and revenue streams, so non-subscribers can use the services as well.

Institutional relations

HOSPIMEDIA made a deliberate choice to be a B2B publication. The HOSPIMEDIA commercial team calls up institutions to offer them trial access. Acquisition of new subscribers and the evaluation of the trial period are the main contact moments between the publication and its clients, as well as opportunities for feedback. One of the advantages of such a B2B model is that legal entities are relatively inert and 95% of subscriptions are continued annually. At the same time, this model means that HOSPIMEDIA has almost no direct relations with readers, except for the contact between journalists and professionals through their reporting.

Although reader-relations are not as much a concern as for many other media, HOSPIMEDIA presents its service in a very clear and user-friendly way, like startups usually do with their products. On one page, and aided by strong visuals, it summarises the HOSPIMEDIA offer and ways for users to make use of it⁷⁹. Moreover, the presentation of the publication, its services, and the editorial team feels very personal. The editorial team is presented with a photo, their area of coverage, and contact information⁸⁰. Each journalist covers a particular part of the country, and focuses on specific themes.

In addition to their editorial team, HOSPIMEDIA has a commercial team (20 people), and a technical team. They believe professionals are willing to pay for information services if they are useful and have added value, but it requires a commercial effort to reel them in. An in-house technical team is crucial for supporting and developing an online publication, through ongoing interaction between reader feedback, the business units and the development of the publication and its services.

⁷⁸ https://reponse-expert.hospimedia.fr/?fbclid=IwAR0qOUolrE1NPxkUyJLwn1DbjszmOTqnzPCeA30UhuR_7ns-T09Ta46Tn6o

⁷⁹ <http://www.hospimedia.fr/service>

⁸⁰ <http://www.hospimedia.fr/redaction>

RIBAJ (UK) – It all starts with the books

A focused content strategy, articulated around the specific skills of the publishing director, and developed within a the broader organisational context of RIBA.

RIBA Journal was created in 1893 as a monthly magazine for the Royal Institute of British Architects (RIBA). It also has an online presence in the form of a website. Every month, 29 500 people receive the print magazine, and this number is still growing. The website has 20 314 monthly unique visitors. They have 80 681 followers on Twitter, 9 556 likes on Facebook, and 4 601 subscribers on LinkedIn. 9 310 receive the weekly editorial newsletter, and 5 739 the product newsletter. The RIBA Journal is one of RIBA's publishing activities. There's also the book publishing program⁸¹. And since 2013, they publish PIP (Products in Practice), a bimonthly technical supplement that covers new projects, products, and innovations in construction, with its own Pinterest account⁸².

Journal and books

The unique character of the journal lies in the particular background of the editor and the publishing director of the journal. The well-known editor was an architecture critic for the Sunday Times for 20 years. Readers value the print journal, and more specifically its very concrete, practical content, down to the most everyday details. During a panel discussion, readers said they wanted to know where others are sitting, what the lay-outs of their offices are, how many of their staff are architects, how they go and get work, etc.

The new publishing director has worked in book publishing for a long time and draws on this experience to develop a new book strategy. The RIBA has a publishing program that publishes 24 titles every year. Although the book program does not have immediate value for members, RIBA wants to be seen as doing interesting things, and leading in terms of information and knowledge. Books allow architects to establish themselves as experts or a thought-leaders in a specific field, and academics to share their research with the profession. Moreover, books are seen as a starting point for content licensing and the creation of lectures, talks, social media content, videos, articles, and audio books. Putting the book program at the centre of its strategy requires about 20 000 pounds a book and a substantial time investment. RIBA takes a risk, hoping for the best possible outcome of this bold publishing strategy.

Feedback and input

RIBAJ has an editorial panel of largely young, female practitioners that meet twice a year and give feedback on the journal. During their monthly team meetings, the editorial team together looks at the page views of all the articles published. Based on these insights, they concluded that readers particularly like 'practice profiles', so the team decided to do more of those in 2019. The organisation of the annual MacEwen award for small projects that have done

⁸¹ <https://www.architecture.com/riba-publishing>

⁸² <https://www.pinterest.co.uk/productsinpractice/>

interesting things for the community, as well as the awards program at the RIBA, provide a constant influx of new projects and practices. This also informs the cases studies selection in the journal.

Within the publishing team, people have complementary networks. Some of the editors have better contacts with practice, while the publishing director has better relations with schools in London. She teaches lectures a few times a year and takes meetings with authors for the RIBA book program, and they occasionally sells books to schools. Editors and journalists regularly talk to people in practice and go to events. Within the wider organisation (RIBA) there are various advisory groups of specialists from different practices. Many of the editors attend those meetings to stay aware of the issues across the architecture profession. Topics discussed range from concerns about Brexit to concerns about work load.

Close collaboration with RIBA

One year ago, RIBA bought back the publishing department, integrating the RIBA Journal into the larger organisation. This offers opportunities for the digital transformation. RIBA's website architecture.com is very successful, and future plans include a stronger connection between the RIBA website and book retail and the journal. For the journal, the print magazine will remain central. Although print and distribution costs are the main expenses, RIBA members see the print publication as a key membership benefit and appreciate the screenless media after having spent their working days in front of a computer.

RIBA's publishing department counts 28 people, including the book shop staff, editorial for the journal and the website, and the sales team. Although the journal is the primary benefit of being a RIBA member, it's production is not financed through membership but through commercial activities (print advertising, sponsored events, advertorials and content marketing). The sales team (4 people) has to bring in enough money to cover the salaries of four almost full-time journalists, their own salaries, and the costs of print and distribution (the biggest part of their budget, and increasing).

The RIBA has a physical location in the centre of London, with the RIBA Library and a book shop⁸³ that are open to the public. All content is also published online, with the RIBA website (architecture.com) more content-marketing led and the RIBA Journal and website (ribaj.com) more editorial-led. The content in the journal has three main parts. 'Building' features case studies. The editorial team visits the building and writes up the case study. 'Intelligence' provides members with information that will help them with their jobs, contracts or business. And 'Culture' covers book reviews, exhibitions, obituaries and everything else that's going on in the field of architecture.

⁸³ <https://www.architecture.com/contact-and-visit/riba-library>

RUIMTEVOLK (NL) – Letting go of the platform completely

Created as a knowledge-platform for professionals in built environment and planning in 2007, RUIMTEVOLK has decided to let go of its platform and focus on the research and consultancy work that was originally meant to support it.

In 2007, RUIMTEVOLK started out as a community-driven knowledge platform for professionals in the built environment and urban planning. Professionals contributed blogs about topical issues in their areas of expertise, and the platform became one of the referential titles in the field in the Netherlands. It was funded through commissioned work and funded projects.

Repositioning and pivoting

RUIMTEVOLK is known as one of the front-runners in the field. Although they were a newcomer when they started, they quickly gained a large readership and became one of the referential titles in the field in the Netherlands. Their projects were and still are focused on a mid-term horizon, and often around yet-to-be-discovered themes, such as the economic strategies of midsize cities or the innovative potential of the countryside. This generated interesting and thought-leading content – blogs, publications and events.

When RUIMTEVOLK realised that they could not compete with government-funded platforms, that their profile (platform and agency) was confusing for other actors in the field, and that competing publications started to look like them, they had to make a decision: either become a full-fledged online medium, or fully develop the consultancy model. In the rethinking process, they created NL Magazine as a print alternative to the online platform – first as a separate brand, and later also with its own website and team to avoid confusion from the outside. Three issues appeared on an irregular basis since 2017, in a limited number of 4 000 issues. However, it proved unfeasible, and RUIMTEVOLK is currently looking for a publisher to take over NL Magazine.

At the same time, to position their research and consultancy work better, they are developing an original method to distinguish themselves. This makes them attractive to some clients, although RUIMTEVOLK still struggles to reach critical mass with these activities.

From community to CRM system

As a knowledge platform, RUIMTEVOLK curated a web magazine and organised events to facilitate knowledge sharing, networking and discussions between professionals in the field. The platform was organised around the idea of exchange. Over time, professionals seemed increasingly interested in what they could get out of it immediately, for example in terms of commissioned work. The community became less tight, but also smaller than before. With the GDPR, RUIMTEVOLK lost about 40% of its former community.

As an agency, RUIIMTEVOLK has adopted a Customer Relationship Management (CRM) system in which they organise their network in three different rings. With those in the first ring, their closest contacts, RUIIMTEVOLK aims to interact at least once every three months. Contact with people in the second and third rings will be less frequent. They marked VIPs in their network to visualise who they are doing it for. Although the 'old' habits are still present, and the founder has to decline quite a lot of invitations to events and meetings that he would've accepted in the past, but that don't fit this new approach anymore.

The 60% of the community that provided consent with the arrival of the GDPR are not part of the CRM, as they also include neighbourhood residents. They just receive the newsletter.

Separate brands

In 2015, RUIIMTEVOLK started a process of rethinking itself, which involved a strategy day and a number of experiments, e.g. the creation of an educational environment around urban and regional questions. They finally decided to continue as a research and consultancy agency and either sell NL Magazine to a publisher, or start using it for marketing content. As the production and distribution costs were too high, partners were sought. RUIIMTEVOLK fully covered the costs of the first issue, found partners to fund 50% of the second issue and only paid 30% of the third issue. However, these partners did not come without demands, which made it a lot less fun to work on the magazine and raised issues about editorial autonomy.

Letting go of the platform was a really hard thing to do - "that's probably why it took us so long" - but they finally realised there was no way for them to make it work. They are now looking to partner with existing platforms to continue their publishing activities (articles and books).

Values

Despite being a commercial agency, the public interest remains an important factor for RUIIMTEVOLK. They invest in their team through permanent contracts, and work according to the principles of corporate social responsibility. For example, employees are given MVO days to work on things they find important for society. Although these activities often don't seem to make much sense commercially, they resonate with RUIIMTEVOLK's social agenda.

Values like inclusivity inform the ways in which RUIIMTEVOLK executes projects, and values like sustainability are integrated into their organisational culture: no meat, all travel with public transportation and 100% renewable electricity. Focusing on developing a profile with a strong identity, externally and internally, and working on things they find important not only attracts talent, but also binds the team together.

Het Nieuwe Instituut (NL) – Different identities under one roof

Successful integration of different sector institutes, aimed at diverse groups of mainly professional but also general public audiences.

Based in Rotterdam, Het Nieuwe Instituut was created in 2013 out of three separate sector institutes: NAI (architecture)⁸⁴, Premsele (design and fashion)⁸⁵ and Virtueel Platform (digital culture)⁸⁶. The building houses a museum, the national archive for Dutch architecture and urban construction, Research and Development activities, the agency for architecture, design and digital culture, a workspace for creative makers, a bookshop and a café. Primarily aimed at professionals, the institute also caters to general public audiences and tourists walking into the institute.

Het Nieuwe Instituut has an agenda-setting and facilitating role. The Institute has regular contact with smaller organisations in the field – mainly front-runners – to identify new trends, and develops its activities based on what it finds important rather than what professionals ask for. They do monitor how audiences receive it. In the case of feedback from exhibition visitors for example, they listen to it but also weigh it against the purpose of the activity concerned and accept that they cannot please everyone with everything. Online they monitor whether visitors click through or not.

Activities

Every department has a specific mandate from the Ministry of Education, Culture and Science who's its main funder (85% of the institute's budget)⁸⁷. The agency for example, has a clear mandate to bring together professionals and scientists, companies and governments to address questions in the architecture, design and digital culture fields. In 2017, the Institute also worked with other Ministries on specific questions and projects related to architecture, design and digital culture (Ministry of Spatial Issues, Ministry of Defense, Ministry of Foreign Affairs).

Due to the physical location of the Institute - the building – the institute's content and activities are mainly exhibitions, events, workshops, and hackathons. Despite competition from Netflix and other organisations, they manage to attract professionals to their events as they specifically target innovative practitioners. and offer them original content. They never book the big names, but instead look for the people that will be big in 5 to 15 years.

Online in support of offline

In addition to the physical location, the institute publishes online content in support of their offline activities: news on the website, different kinds of newsletters, recordings of

⁸⁴ Netherlands Architecture Institute (1993-2013)

⁸⁵ Premsele, Dutch Institute for Design and Fashion (2003 – 2012)

⁸⁶ E-culture Knowledge Institute (2007-2012)

⁸⁷ Annual report 2017.

events, and web magazines⁸⁸ with background information, longreads, and videos on the various exhibitions, and research and development programs.

In terms of social media, Instagram has become more important in contrast with Facebook. They initially created one general Instagram account for the whole institute, but the different departments indicated that they also wanted to have their own Instagram account. The Collections department uses its Instagram in a very specific way, to share nice drawings, models, and stories. The general institute account has a much broader scope and publishes everything from ongoing projects to 'behind the scenes' images of the organisation and events.

Different target groups

The institute's audience exists of many different types of people, and has become more diverse since the merger of the different institutes. Both professionals from the fields of architecture, design and digital culture, and general public, families and tourists. No communication is aimed at all of their audiences, but rather they propose different channels and activities for different target audiences. These groups are addressed in very different ways, and get to see different parts of the organisation.

They distinguish between different network groups, including the 'Members network' and 'Friends of'. The 'Members network' exists since 1,5 years and is young, young-spirited, anglophone, interdisciplinary, wants to develop themselves, is focused on networking, and more open to experimental and intellectual things. They are very different from the "Friends of" that are linked to the former NAI, are mainly architects, and older on average.

Organisation

The integration of sector institutes NAI, Premisela and Virtueel Platform in 2013 was ordered by the Ministry of Education, Culture and Science. The organisations moved from Amsterdam into the NAI building in Rotterdam, and suddenly had to focus on three disciplines that are quite different. It was helpful that the new director came with a new, and from the start integrated, vision for the organisation. And they often work across departments on projects, in cross-functional teams, drawing from the wide pool of expertise and skills present within the institute.

Guidelines streamline the communication activities across the many departments of the organisation, without being restrictive or permanently fixed. The institute's activities are organised around what they have, while they acknowledge that they could have done similar things in a different setting. Without the building there would have been more programming on location for example, as they now do at biennales. In the end, the form of the activities doesn't matter as much as the organisational mission and identity in which these activities are rooted.

⁸⁸ <https://hetnieuweinstituut.nl/en/magazines>

Conclusion

Across the media industry, the fact that advertising is becoming less important is driving change. In response to this trend, readers are increasingly placed at the centre of media organisations' strategies, referring to them as 'users', 'members', or the 'community'. This focus on readers can also be seen in the shift from 'new' to 'useful' content, in the diversification beyond content, and in the development of hybrid forms combining offline and online activities.

The large variety of practices in terms of content strategies, print-digital relations, audience relations, and business models could be understood in terms of different foci in the organisational strategies of different media organisations, as well as the contexts in which they operate.

Organisations that are more service-oriented, tend to be more pragmatic in their content strategies, relations with audiences and business models than organisations that are more mission-driven or future-oriented. Mission-driven organisations tend to look for closer and more engaging relations with their audiences and develop editorial strategies and offline activities that support this. Future-oriented organisations focus on agenda-setting and will listen to audiences, but work primarily from their own instincts and from conversations with other front-runner organisations. In most cases, a combination of foci be identified, but one of them is generally stronger.

There are also two general trends in the ways in which organisations are structured. Some tend towards a more networked model, looking for partnerships with other organisations, while others tend towards a more integrated model. In some cases, a combination of the two models can be identified, and they ultimately have the same objectives of building critical mass, expanding their reach and sharing resources.

Appendix – Cases included in professional media survey

Name	Country	Type	Website
DBZ (Deutsche Bauzeitschrift)	Germany	Magazine of the Bund Deutscher Baumeister Architekten und Ingenieure e.V., published by Bauverlag, who publishes 12 titles	https://www.dbz.de/
Zeitschrift Baukultur	Germany	Magazine of the Verband Deutscher Architekten- und Ingenieurvereine e.V.	https://www.dai.org/oeffentlichkeitsarbeit/baukultur/beitraege
Der Architekt	Germany	Magazine of the BDA Bund Deutscher Architekten	http://derarchitektbda.de/
Arch+	Germany	Independent media brand (magazine, events, website, etc.)	https://www.archplus.net/home/
Topos	Germany	One of 6 professional titles published by Callwey GmbH & Co. KG	https://www.toposmagazine.com/
DB Deutsche Bauzeitung	Germany	Oldest professional magazine in Germany for architecture and construction	https://www.db-bauzeitung.de/
DETAIL	Germany	Independent professional publication, published by Business Information GmbH	https://www.detail.de/
Bauen Aktuell	Germany	Professional publication focused on technology in construction, published by WINVERLAG GMBH	https://www.bauen-aktuell.eu/

		& CO. KG	
GRAFT	Germany	Large architecture firm publishing reports, books and news for professionals	http://graftlab.com/news/
Bundesstiftung Baukultur	Germany	National foundation publishing news and organising events	https://www.bundesstiftung-baukultur.de/baukulturberichte
Le Visiteur	France	Annual review published by SFA – Société Française des Architectes	http://www.levisiteur.com/
La Pierre d'Angle	France	Digital publication of ANABF – Association Nationale des Architectes des Batiments de France	http://anabf.org/pierredangle/
Batiment Actualité	France	Magazine of the FFB – Fédération Française du batiment	https://www.ffbatiment.fr/federation-francaise-du-batiment/laffb/mediatheque/batiment-actualite.html
Le Moniteur	France	Part of Le Groupe Moniteur, which is part of InfoPro Digital, who publishes 70 professional titles	https://www.lemoniteur.fr/
Cayola Construction	France	Website of Groupe Cayola, professional publisher in construction and (built) environment	https://www.constructioncayola.com/
Métropolitiques	France	Digital publication for exchange between practitioners and researchers	https://www.metropolitiques.eu/
RIBA Journal	UK	Magazine of the	https://www.ribaj.com/

		Royal Institute of British Architects (RIBA)	
New Civil Engineer	UK	Magazine of the Institution of Civil Engineers, one of 30 professional titles published by publishing house EMAP Publishing Limited	https://www.newcivilengineer.com/
Architectural Review	UK	One of 30 professional titles published by publishing house EMAP Publishing Limited	https://www.architectural-review.com/
Construction News	UK	One of 30 professional titles published by publishing house EMAP Publishing Limited	https://www.constructionnews.co.uk/
Architecture Today	UK	Independent trade publication	http://www.architecturetoday.co.uk/
Architects Journal	UK	One of 30 professional titles published by publishing house EMAP Publishing Limited	https://www.architectsjournal.co.uk/
Blueprint Magazine	UK	Published by DesignCurial, part of a large publisher	http://www.designcurial.com/aboutus/blueprint-home-page.html#subscribe
Construction Magazine	UK	Weekly independent magazine	https://constructionmaguk.co.uk/
Place North West	UK	Regional digital service for	www.placenorthwest.co.uk

		professionals	
Architraaf/ Architrave	Belgium	Bi-lingual magazine published by Maison des Architectes vzw, a collaboration between 3 Francophone architects associations	http://www.architraaf.be/ http://www.architrave.be/
BVA	Belgium	Website and newsletter of Dutch architects trade association	https://bvarchitecten.be/
Architect	Belgium	One of 34 professional titles published by publishing house PMG (Professional Media Group)	http://architect.pmg.be/nl/home
Projecto	Belgium	One of 34 professional titles published by publishing house PMG (Professional Media Group)	http://projecto.pmg.be/nl/home
Aannemer	Belgium	One of 34 professional titles published by publishing house PMG (Professional Media Group)	http://aannemer.pmg.be/nl/home
Cobouw	Netherlands	One of 30 professional titles published by publishing house Vakmedianet	https://www.cobouw.nl/
De Architect	Netherlands	One of 30 professional titles published by publishing house Vakmedianet	https://www.dearchitect.nl/
BNL	Netherlands	Association	https://

		publication (of the main national professional organisation in construction)	www.bouwendnederland.nl/publicaties
RO Magazine	Netherlands	Independent trade magazine	http://romagazine.nl/
Architectuur Lokaal	Netherlands	Independent Association publishing magazine	https://arch-lokaal.nl/publicaties/tijdschrift/
NL Magazine	Netherlands	Magazine and blog of consultancy firm	https://nlmag.nl/
Agora Magazine	Netherlands	Institutional publication from faculty geo sciences, University of Utrecht	http://www.agora-magazine.nl/
Het Nieuwe Instituut	Netherlands	Platform for architecture, design and digital culture publishing newsletter for professionals in the field	https://agentschap.hetnieuweinstituut.nl/nieuws

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