Trend Survey January 2014

Smart Publishing

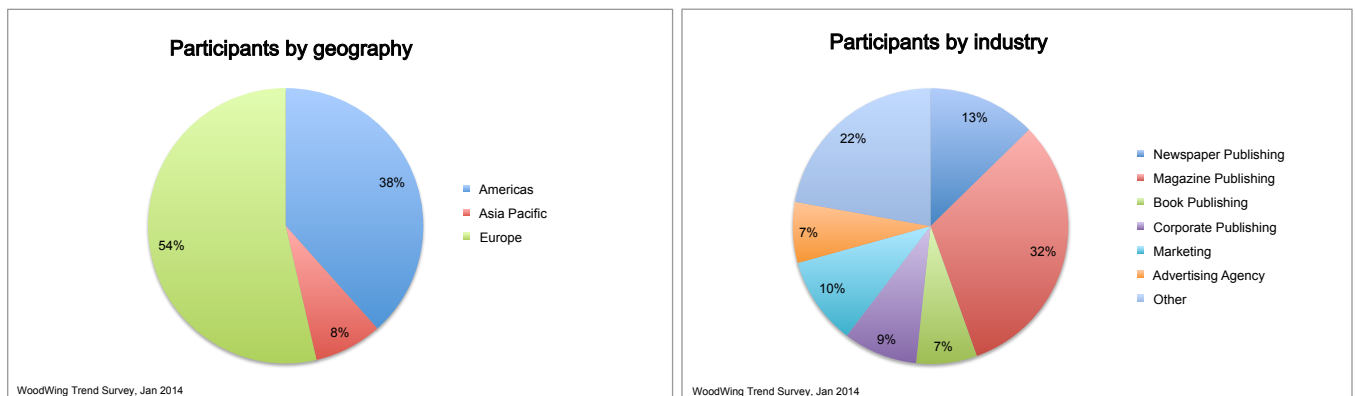## WoodWing Survey "Trends 2014": Multi-channel top of the agenda – print to survive

Executive Summary

A study conducted by WoodWing Software from mid-December to mid-January examined relevant publishing technology trends for 2014. A total of 125 participants – mainly from the Americas, Europe and the Asia-Pacific region – answered four multiple-choice questions about their publishing strategies and the use of social media. The submissions came mainly from newspaper, magazine and corporate publishers as well as advertising agencies and marketing departments. Of these, 59.2% plan to implement a comprehensive multi-channel strategy this year. No less than 21.6% still focus on print above Web and Mobile. In social media, Facebook (77.2%), Twitter (61%) and YouTube (53.6%) clearly dominate, while the high interest in LinkedIn (31.7%) is also noteworthy. With social media, 71.2% want to increase brand awareness, while 41.6% want to make inroads in new markets.

1.0   Methodology

The survey ran from mid-December 2013 to mid-January 2014. It consisted of four multiple-choice questions. In one additional field, the participants were able to individually comment on trends they expect to see in the coming months. The survey was executed based on Formdesk. Participants acquisition was performed via a dedicated newsletter, press releases, social media as well as via relevant groups on LinkedIn and XING. The participation was encouraged by the raffle of an Apple TV.
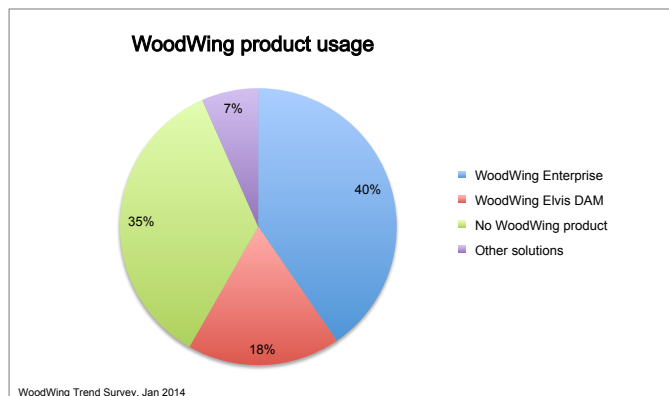
2.0   Participant analysis

The submissions came from Europe (54%), the Americas (38%) and the Asia-Pacific region (8%). In Europe, the focus was on Germany (14%), the Netherlands (11%) and both Switzerland and Finland with 3%. In the "Americas" the focus was on North America (25%) and in Latin America on Brazil (5%) and Mexico (4%). In the Asia-Pacific region, the most submissions came from Australia (3.2%).
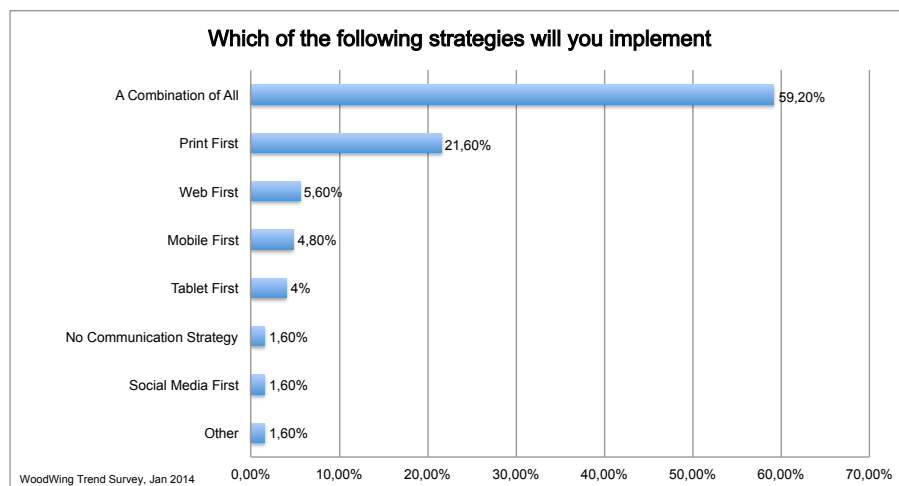
Related to the industry, the focus was clearly on the fields of newspaper (13%) and magazine (32%) publishing. The high share (17%) of submissions from the marketing segment and advertising agencies was remarkable.

WoodWing product usage

WoodWing Trend Survey, Jan 2014

According to the methods used for acquisition of participants, the share of users of WoodWing products came to a total of 58% (WoodWing Enterprise 40%, Elvis DAM 18%) – but the share of 35% of participants who still do not use any WoodWing solution is an indication for the potential of the market.

3.0   Multi-channel top of the agenda – "first" approaches fall through – print to survive

Which of the following strategies will you implement
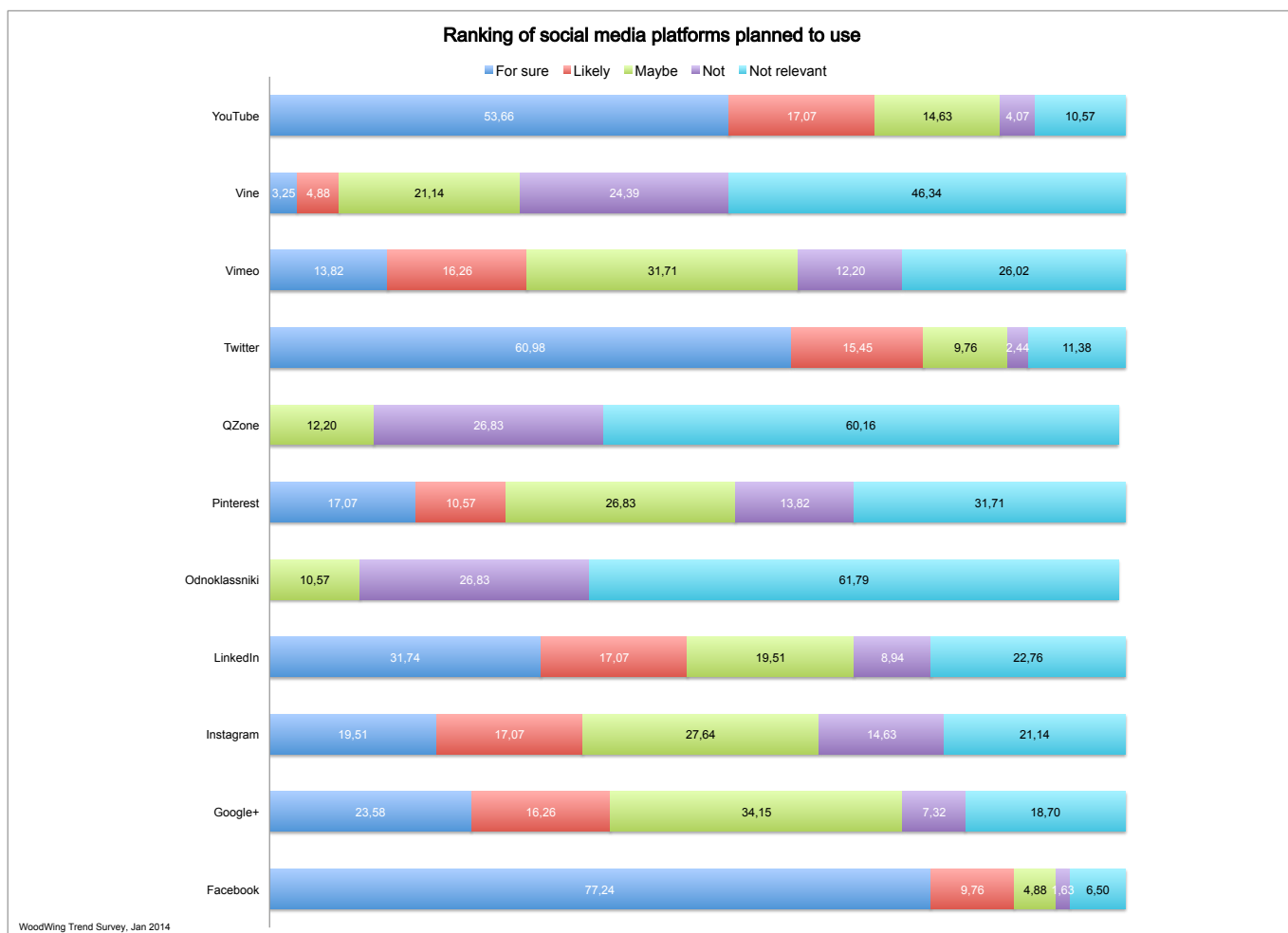
WoodWing Trend Survey, Jan 2014

The study shows that publishers, agencies and marketers have recognized that modern communication must address the variety of publishing channels to reach its audience. The majority, 59.2%, favor the combination of print, Web, mobile, tablet and social media.

Given the hype that is made about the various "first" approaches, it´s a surprise that they are hardly favored – only 5.6% vote for Web first, 4.8% for Mobile first, only 1.6% for Social Media first. It is obvious that the interaction between the different channels is considered crucial for the achievement of communication goals.

In contrast, print can look forward to continued strong support – 21.6 % favor printed media and marketing tools.

4.0   In Social Media, Facebook, Twitter and YouTube still have the lead

Ranking of social media platforms planned to use

Legend: For sure | Likely | Maybe | Not | Not relevant

Platform	For sure	Likely	Maybe	Not	Not relevant
YouTube	53,66	17,07	14,63	4,07	10,57
Vine	3,25	4,88	21,14	24,39	46,34
Vimeo	13,82	16,26	31,71	12,20	26,02
Twitter	60,98	15,45	9,76	2,44	11,38
QZone			12,20	26,83	60,16
Pinterest	17,07	10,57	26,83	13,82	31,71
Odnoklassniki			10,57	26,83	61,79
LinkedIn	31,74	17,07	19,51	8,94	22,76
Instagram	19,51	17,07	27,64	14,63	21,14
Google+	23,58	16,26	34,15	7,32	18,70
Facebook	77,24	9,76	4,88	1,63	6,50

WoodWing Trend Survey, Jan 2014

With regard to the relevance of the various social media channels, Facebook, Twitter and YouTube still have the lead – 77.2% say, they will use Facebook "for sure." Twitter registers at 61%, with YouTube at 53.7%
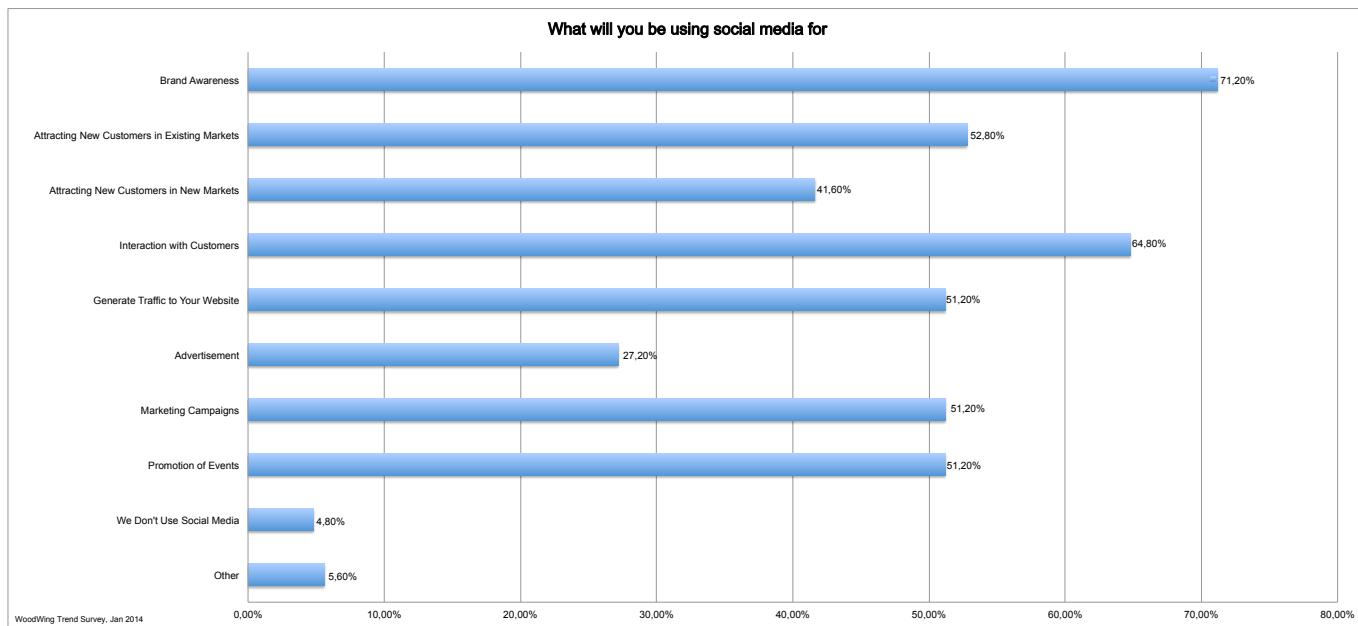
In the evaluation of other channels such as Google+, Instagram, Pinterest and Vimeo the participants were less enthusiastic – just 17.7 % were sure to use Pinterest (Google+: 23.6%, Instagram: 19.5%), no less than 31.7% rated Pinterest as not relevant (Google+: 18.7%, Instagram: 21.5%).

At the global level more exotic platforms such as Odnoklassniki and QZone also found some interest. Odnoklassniki is strong in Russia, QZone is an established platform in China. After all, 10.57% say they might use Odnoklassniki, QZone earned 12.2% in the same category.

The high interest in the business network LinkedIn as a social media channel is remarkable – 31.7% say they will use LinkedIn "for sure" to address their audience.

5.0 Brand awareness and new business are main social media goals

What will you be using social media for

Category	Value
Brand Awareness	71,20%
Attracting New Customers in Existing Markets	52,80%
Attracting New Customers in New Markets	41,60%
Interaction with Customers	64,80%
Generate Traffic to Your Website	51,20%
Advertisement	27,20%
Marketing Campaigns	51,20%
Promotion of Events	51,20%
We Don't Use Social Media	4,80%
Other	5,60%

WoodWing Trend Survey, Jan 2014

The main reasons to communicate via the various social media channels is to increase brand awareness (71.2%) and to interact with customers (64.8%). Social media also plays an important role in customer acquisition – 52.8% aim to reach new customers in existing markets, 41.6% use it to address new markets. Just 4.8% say they don´t use social media.

6.0 Multi-channel publishing efficiency and repurposing of content is in the focus
Some of the comments on expected trends reflect the participant´s thoughts and strategic approaches in more detail, some examples:
– New models for tablet publishing, Flipboard and Zinio will succeed (corporate publisher)
– Sharing and recycling information (corporate publisher)
– Simplifying web and newsletter communications (corporate publisher)
– Design once, publish to multiple formats (advertising agency)
– Channel-neutral authoring workflows; streamlining/improving efficiency of workflows that feed Web, blog, mobile and social channels (magazine publisher)
– Shifting away from print replicated on tablets (magazine publisher)
– A combination of all possibilities – text, video, music and photo. The newsletter in magazine form (magazine publisher)
– Enhanced usability for print publishing, Web, tablet and mobile (newspaper publisher)
– The ability to centralize our content for all medias and simplify the archive and retrieval process and have more robust search capabilities (book publisher)

7.0 No royal road in modern publishing
"On one hand, the results of our trend study have shown that publishers of all kind have recognized the importance of providing their content via various channels," said Roel-Jan Mouw, CEO of WoodWing Software "On the other hand, the broad variety of strategic approaches has also revealed that there is no royal road to reach the relevant audiences.. In the light of these findings, we are pleased to see confirmation that publishing and DAM solutions should be open and flexible enough to support each and every publishing strategy and workflow. That's exactly the philosophy behind our multi-channel publishing system Enterprise and our digital asset management solution Elvis DAM."

About WoodWing Software
WoodWing Software develops and markets a premier, cost-efficient multi-channel publishing system, Enterprise, and the next-generation digital asset management system, Elvis DAM. WoodWing's solutions are aimed at magazine and newspaper publishers, corporate publishers, agencies and marketing departments to reach their goals for quality, economy and time-to-market.

WoodWing's publishing system Enterprise – including the editorial management application Content Station – coordinates and streamlines the process of creating, managing and publishing static, dynamic and interactive content for all media channels – print, Web, social, smartphones and tablets. Elvis DAM enables users to securely store and efficiently manage the increasing collection of rich-media files.

WoodWing Software, founded in the year 2000, has its headquarters in Zaandam, The Netherlands, and has regional sales offices in Europe, the Americas and Asia Pacific. Customers are served locally by over 90 selected partners in more than 100 countries. WoodWing's long-standing relationship with Adobe as a Technology Partner and its close cooperation with a large number of other technology vendors worldwide, confirm WoodWing's position as one of the leading suppliers of publishing software. WoodWing is a privately owned company, with all founders actively engaged. Additional information regarding WoodWing's products and services can be found at www.woodwing.com.

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