

Tablet & App summit 2012



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Written by Martin Belam

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<i>About Martin Belam</i>	4
<i>About Emblem</i>	4
<i>Introduction</i>	5
<i>“The UX of publishing for tablets & smartphones” - Martin Belam</i>	6
<i>“Taking Stern magazine to the iPad” - David Heimbürger</i>	17
<i>“Condé Nast place value in digital reach over digital sales” - Jamie Bill and Jamie Jouning</i>	19
<i>“Behind the curve - the media and the new App economy” - Stijn Schuermans</i>	22
<i>“Brazil’s newspapers close ranks against Google & Apple” - Caio Túlio Costa</i>	24
<i>“Launching ePresse to challenge Apple & Amazon in France” - Philippe Jannet</i>	26
<i>“Optimising the FT using HTML5 & customer data” - Steve Pinches</i>	28
<i>“Windows 8: Opportunities for publishers” - Frank Wolfram</i>	30
<i>“Building De Standaard for Windows 8” - Johan Mortelmans and Twipe</i>	31
<i>“Toronto Star’s Ad Lab for digital advertising innovation” - Kate Collins</i>	32
<i>“A journey into the New York Times mobile and tablet strategy” - Alexandra Hardiman</i>	34

About Martin Belam

Martin Belam is Principal Consultant at Emblem, and has spent over a decade building successful digital products and user experiences across mobile and the desktop for global brands like the Guardian, BBC, Sony and Vodafone.

Martin blogs about user experience, journalism and digital media at currybet.net, and can be found on Twitter as [@currybet](https://twitter.com/currybet).

About Emblem

Emblem is a digital consultancy offering user experience design and training services. We work with organisations and start-ups in the publishing, media, arts, heritage and culture sectors. Clients include the BBC, Guardian, Trinity Mirror, Arts Council England and the Imperial War Museum.

At Emblem we work differently. We don't concentrate on hourly billing, producing glossy presentations, or ticking boxes for the sake of it. We concentrate on your audience. We work with you to solve actual problems, and we help you put the user right at the heart of your digital products and services.

To find out how we can work together, contact claire@emblem-digital.com

Introduction

WAN-IFRA's Tablet & App summit forms part of the conference programme at the World Publishing Expo in Frankfurt. 2012 was the fifth edition of the event, and I was delighted to be asked along to give the opening talk on the day, on what I've learned about user experience from designing apps and services for smartphones and tablet devices.

The day's talks included case studies from some big publishing brands like Condé Nast, the New York Times and the FT. It also featured stories from Brazil, Canada, France, Belgium and Germany. There was a real mix of approaches, from the very forward thinking use of HTML5 web apps and analysis of user data from the Financial Times, to some incredibly resource intensive ways of producing tablet editions of magazines in a very traditional manner.

This ebook not only includes the full essay version of my own talk, but my blog posts about all of the other sessions during the day. Hopefully this will give you a comprehensive overview of the topics tackled.

I'd like to thank all of the speakers at the event for being so generous in giving their time, and their willingness to share their knowledge and stories. I'd like to extend a special thank you to Valérie Arnould and Nick Tjaardstra at WAN-IFRA for their work in not just putting together the conference programme, but in looking after me whilst I was in Frankfurt.

*Martin Belam,
Frankfurt am Main, November 2012*

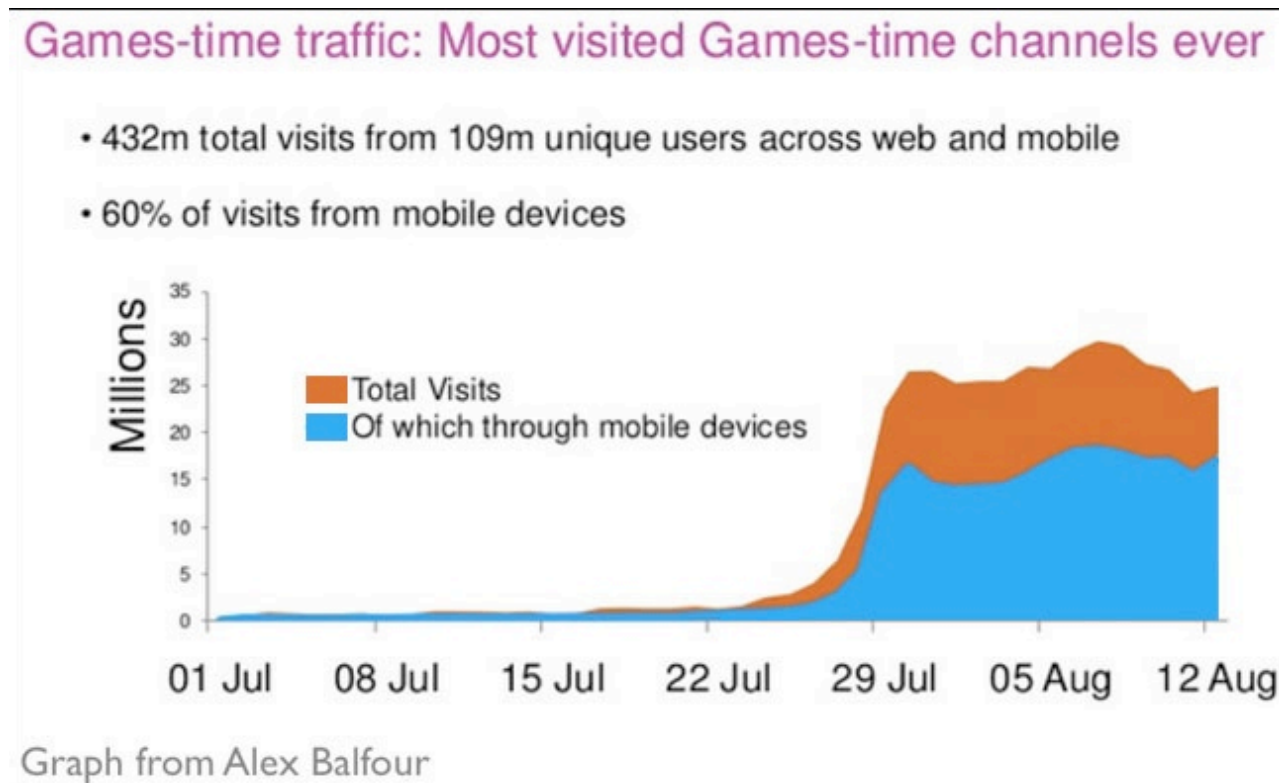
“The UX of publishing for tablets & smartphones” - Martin Belam

For nearly all of my adult digital life people have been telling me that next year is going to be the big breakthrough year for the mobile web. One year I got so excited about this that I even taught myself [WML](#) - a mark-up language somewhere between HTML and 1960s computer punch-cards. I thought I was going to be the most employable developer in town.

And what did I do with my exciting new skills? I made [my own personalised BBC mobile homepage](#).

[I worked for the BBC at the time](#), but on my Sony Ericsson T-610 it took ages to navigate through the *real* mobile site to the sections I knew I wanted to read. I wrote a script that took RSS feeds from some BBC Sport sections I was interested in, and then published the headlines and links out as a WML page. Data cost money, and bandwidth was low, so having a simple overview of the news I wanted to see as I headed off to work in the morning was an attractive proposition. I was in a hurry. I was on a bus. I only wanted to scan headlines and snack on information. I was a walking talking mobile use case cliché.

This was in June 2004, and [the Olympics were being held in Athens](#). This is so long ago that, in those days, the IOC asked that you send a fax to their lawyers requesting permission before you linked to their website. The award of the 2012 Olympic Games to London was still a year away. By the time they came around this year, it felt like we had *finally* reached a significant tipping point with mobile. After the Games finished, new media chief for London 2012 Alex Balfour [published an analysis](#) of usage of [london2012.com](#) during the event. One very telling statistic was that 60% of visits to the site during the course of the Olympics were from a mobile or tablet device.



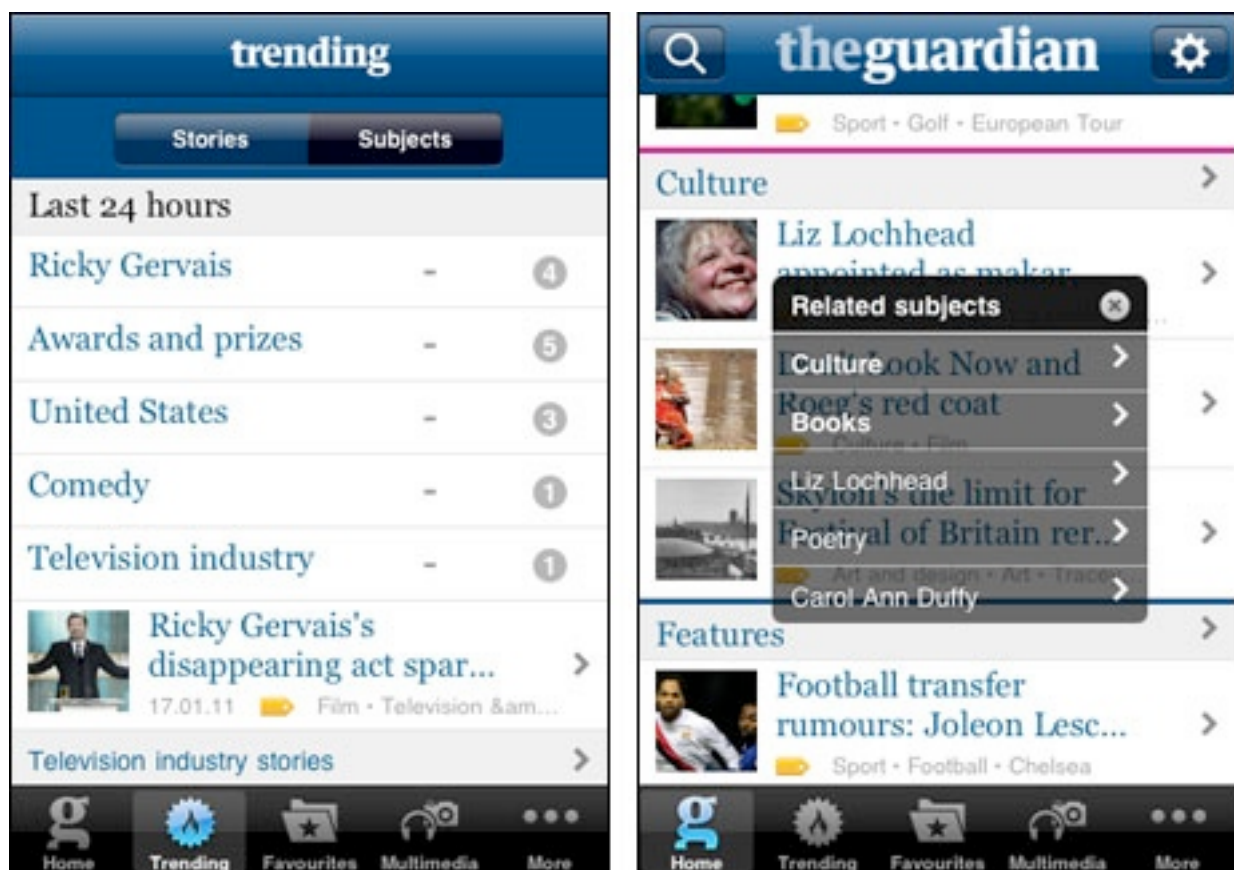
The fact is that people love their touchscreen devices. I've seen a survey suggesting that most Europeans are never more than a metre from their phones — i.e. they carry them

around with them all day, then put them down beside them at their bedside when they sleep. You know, in case they need to check their text messages at 4am. And we are now conditioned to expect touch. I keep making myself look ridiculous trying to buy tickets on various European urban transport systems by resolutely stabbing my fingers at some screen whilst ignoring the perfectly obvious buttons located next to it.

Touchscreen apps at the Guardian

Over the course of my time at the Guardian I worked on several apps aimed at touchscreen devices, including the first Guardian iPhone app. A small team worked hard to bring a version of the Guardian to the phone that felt more naturally designed for the device, and to give a better user experience than the standard free mobile site. The app originally had a one-off download charge. Prior to launch, a lot of the wisdom in the market was that you couldn't charge for general purpose news apps — and you *certainly* couldn't charge for them if all of the content was available for free via the web browser on the same phone.

That “wisdom” was wrong, and the app was a success, to the extent that when we were running user testing sessions prior to developing version two, our own users were telling us that it was too cheap, and that they would have happily paid a subscription. User testing was an important part of ensuring that the product met the needs of users, and that the design and functionality are easily understood.



The Guardian iPhone app

I also worked on testing for the Guardian iPad edition. [I think it is a beautifully designed reading experience on the device](#), but that doesn't seem to have translated to mass take-

up of the app. User testing prior to release showed up some flaws in the product proposition for the early adopter techie crowd — at the time of launch I described [the testing on this blog](#) as “showing a family saloon to some boy racers. They would grudgingly admit that it had four wheels and got you from A to B, but they weren’t excited about it, and didn’t find it digital enough.”

On that occasion, the business opted to take small details from the user testing sessions — for example adding tiny chevrons on every article to indicate that you can swipe from left to right — but not to fundamentally alter the static edition-based premise of the Guardian on iPad that many users were finding unsatisfactory.

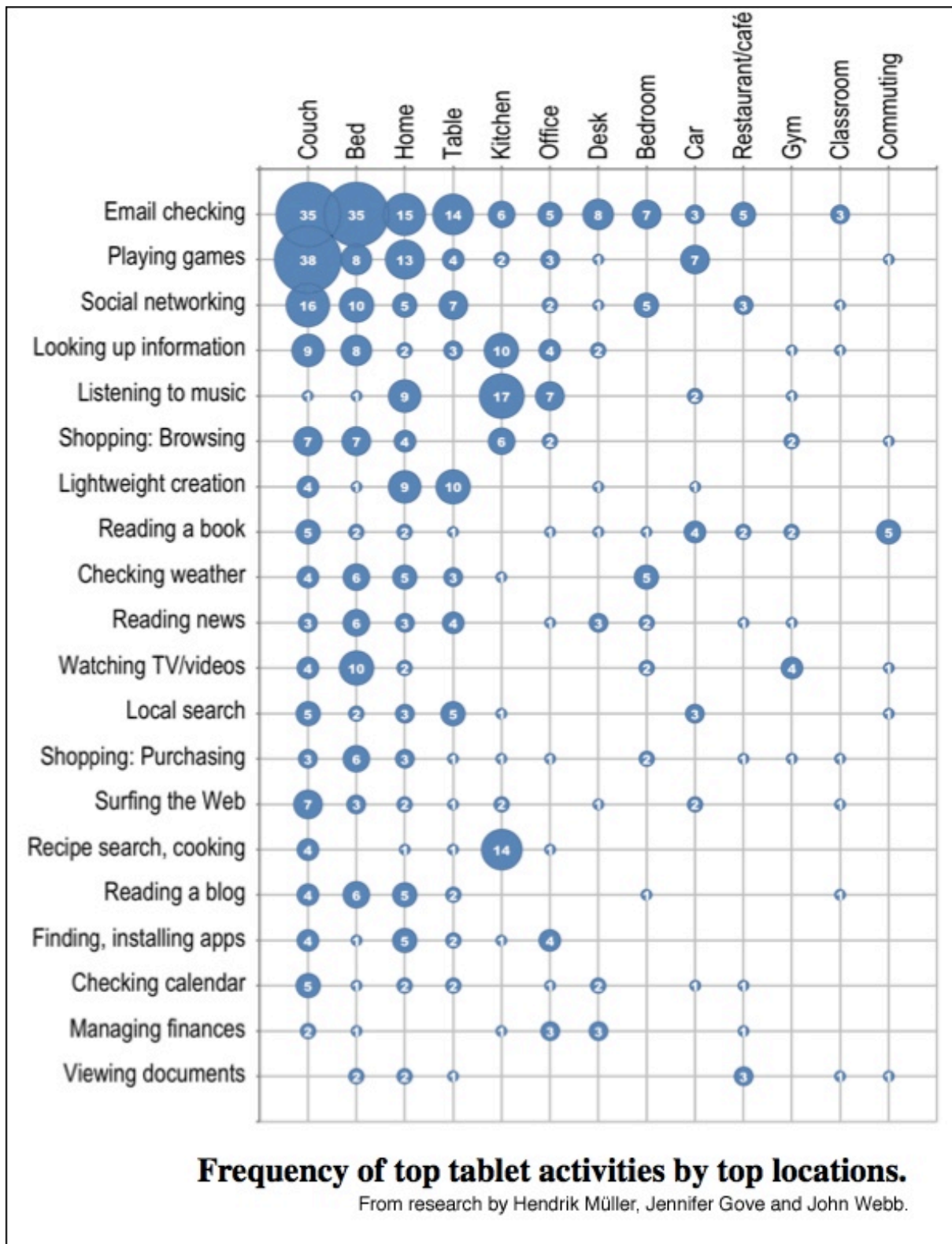


The Guardian iPad app features little chevrons to indicate where the user can swipe

We need to *really understand* our users, not just second-guess them. If you’ve never had the opportunity to observe a user testing session, I urge you to do so. Watching someone struggle to use the simplest of products you’ve had a hand in building reminds you that perfectly formed designs don’t just fall out of your head.

And people aren’t always running for buses or sitting on trains when using their smartphones or tablets. The idea that because a device is mobile it is always used in a mobile context is a fallacy. At Google, Hendrik Müller, Jennifer Gove and John Webb recently published [a research paper describing a study into tablet usage in the US](#). They did a combination of “diary study, interview, and observational methods” with 33 participants, who were chosen to align to the general demographics of tablet ownership in the US.

One of the most interesting findings is the verification that tablets are *overwhelmingly* used in the house, with the couch and the bed being the two most popular locations. The most popular activities by far are checking email, playing games, checking social networks and looking for information.



“Reading the news” was done on the tablet by around 45% of users:

“Participants primarily used native apps (e.g., Slate, Wall Street Journal, Fox News) and aggregators (e.g., Flipboard, Pulse) to access news content, though several reported using the browser to surf across favorite news sites (e.g., CNN, NYTimes, and local news providers).”

Notably, less instances of “Reading the news” were reported than instances of “light content creation” — which given the presumption that tablets are a lean-back consumption device struck me as slightly unexpected.

Patterns of usage change during the week:

“Weekdays showed more frequent email checking, managing of calendars, and checking the weather, but also included longer activities such as listening to music or social networking; however, activities such as watching videos, playing games, reading, and shopping were more frequently done on weekends.”

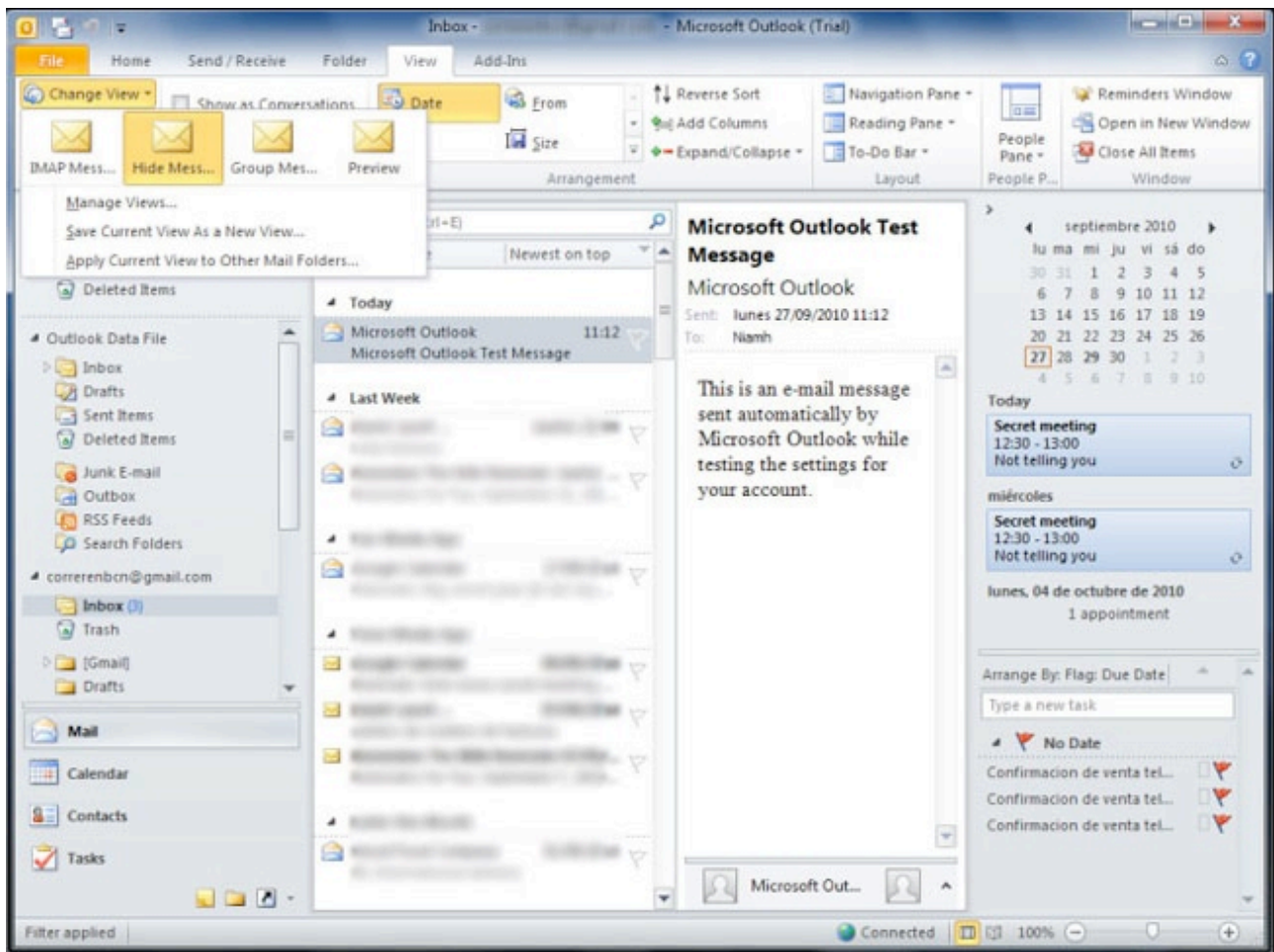
Users are also frequently doing something else at the same time as using their tablet device:

“41% [*of uses of tablets reported in the study*] showed partial engagement. Note that this number is to be considered as a lower bound as it is possible that participants under-reported or forgot to explain those activities they were engaged in outside their tablet use. The most frequently reported non-tablet activities that participants were doing at the same time they were using their tablet were: Watching TV, eating or drinking, cooking, waiting somewhere, getting dressed, talking with others, and exercising, among others.”

Do one thing, and do it well

If users are trying to do two things at once, then the chances are that are not concentrating fully on either, which tends to suggest apps need a simplicity at their heart. In fact, I’ll bet that the apps you use most on your phone or tablet do *one* thing, and do it very well.

What do I mean by doing one thing only? Well, consider Microsoft Outlook on the desktop. It sends and receives emails. It manages your contacts and address book. It does meeting requests and calendar management. It has a task list functionality. And a very cluttered UI.



Microsoft Outlook 2010 can look very cluttered on the desktop

Contrast this with Apple's approach to similar features in iOS.



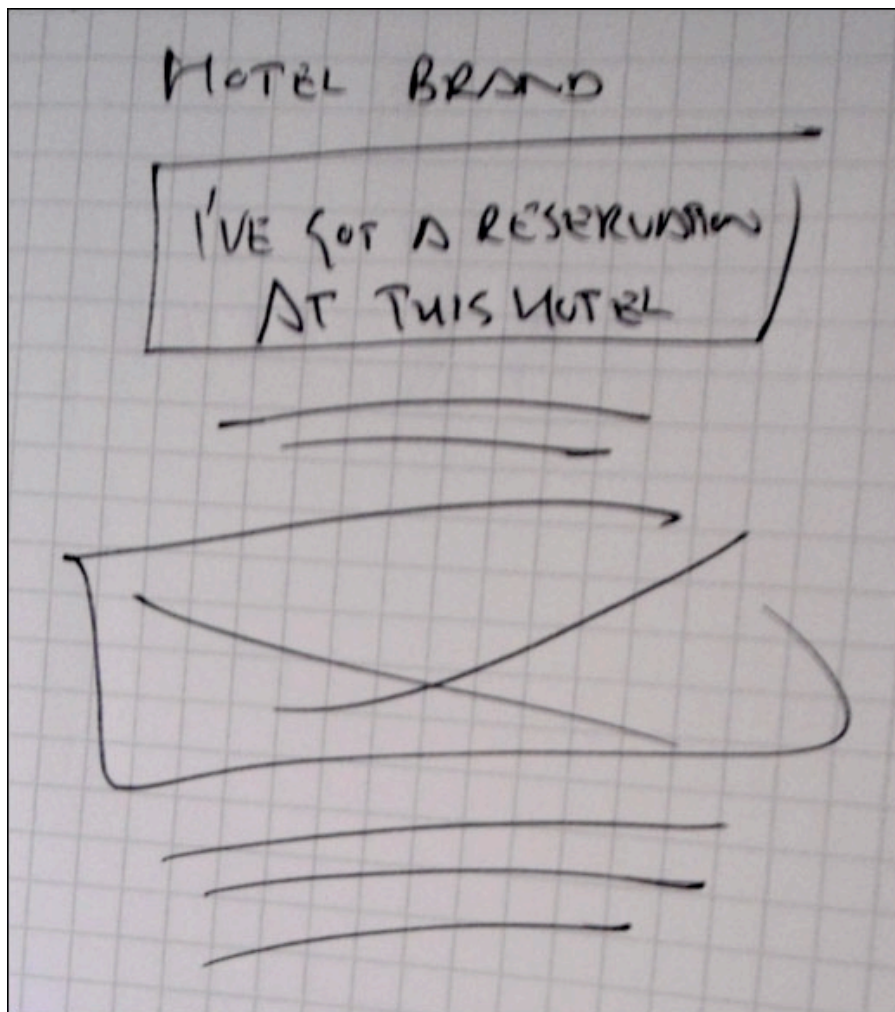
Mail, Calendar and Contact management are in separate apps. The user chooses *up front* which aspect of their life they want to manage or edit, and so the small screen device is able to present a UI entirely attuned to what the user is trying to do *at that moment*. Not a route to everything they might possibly want to do that the device or software is capable of.

Yet often publishers want apps that showcase the breadth and depth of everything that they do. At the Guardian it was sometimes possible to develop very simple apps. With the pressure of getting it ready in time for the launch of the original iPad, the Eyewitness app showed off beautiful photography beautifully. The original incarnation simply gave you one brilliant new photograph every day, with sponsorship as the business model.

It wasn't always this focussed though. The beta version of a Guardian app built for Google TV devices ended up featuring lots of different content types, even though TV as a medium would typically have suggested video and photo galleries should be the priority. In fact valuable development and design time was spent on formatting text articles for the TV, when in reality, the chances seem slim that an early adopter of internet-enabled television would not also have a more convenient device to hand to read the news.

How do you apply this thinking to your products? Ruthlessly prioritise your use cases, and find ways to put users onto these simplified paths as soon as possible.

One of the exercises in my "Responsive IA" workshop typically looks at hotel websites. They need to support a complex array of use cases — researching a trip, booking a room, getting to a venue, selling the hotel as a venue for conferences and weddings etc. But it strikes me that there is one key pivot point amongst those multiple audiences, namely "Do you already have a booking with this hotel or not?" If I was designing a hotel website for small screen devices, the first thing I'd test would be whether having a big button that takes users with existing bookings off to a whole separate information architecture that supports their needs worked.



And if making that journey easier works for the smallest screen, why wouldn't you use the same approach on tablets and desktop machines too?

The challenge of “responsive design”

The trend towards responsive design in digital services presents some big workflow challenges for both publishers and designers.



Time's responsive redesign shown on several devices

[AppendTo\(\)](#) did a lot of the build work for [Time's](#) recent foray into responsive design. When publishing [their corporate case study of the process](#), one of the key difficulties they highlighted was dealing with advertising.

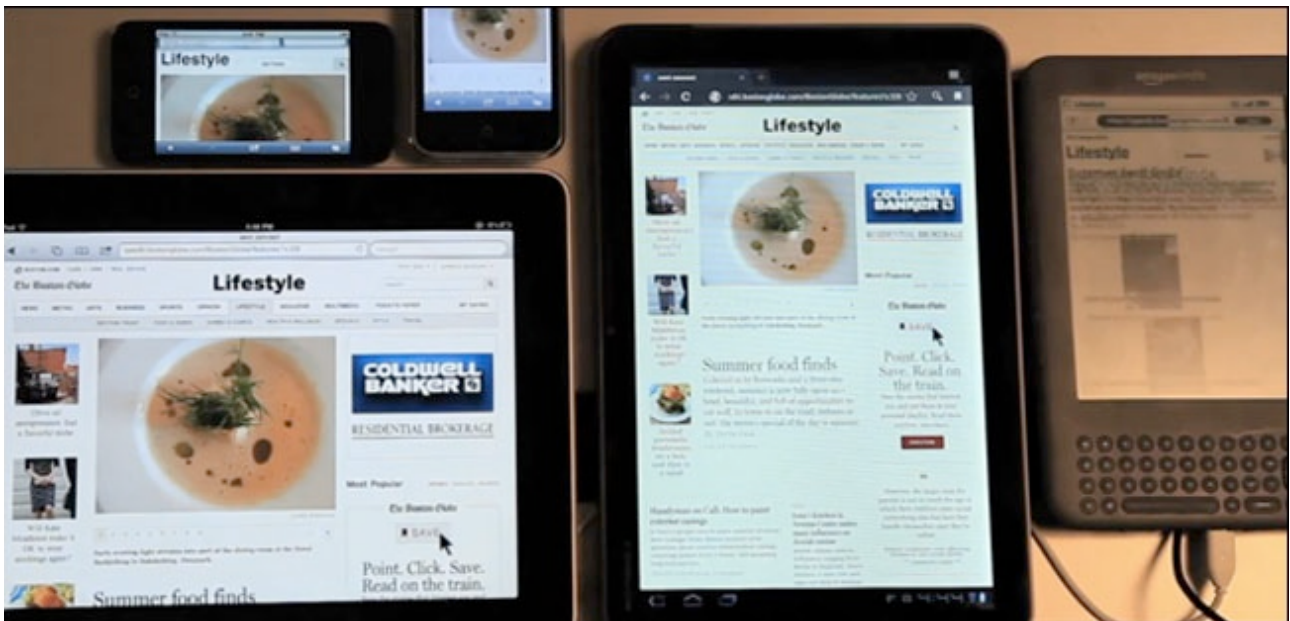
“The ads had the most restrictions and required the highest level of functionality on the site redesign. The ads themselves would remain at fixed sizes, but the page would need to load the correct ad for the device type (mobile, tablet, desktop) as well as one that fitted in the available size. When orientation changes occur (users rotate their mobile devices or tablets) or the browser window width changed, some of the ads that fit previously would no longer fit on the page without breaking the layout.”

If I can get away with it, I've been tending to design the minimum number of screen possible. This isn't just a case of being lazy. We didn't used to make different design deliverables for people on tiny monitors or on large monitors, so you should only be making designs for the sizes where things actually *need* to vary. In that [AppendTo\(\)](#) case study, they mention Time supplying them with over 200 Photoshop files of how the redesign was destined to look. That sounds like an absolute nightmare. They stressed that the only way they made the project work was because Time gave them permission to make local decisions every time they had to vary from the comps, without having to refer back to the Time design team.

We need to change the way we work though. If you make 200 photoshop illustrations, all you've done is draw some pictures. You haven't written a single line of code that will get

you to the end of a project any faster. Obviously you need to use the right tools for the job, and code isn't the right medium to do *all* of your design work in, but rapid prototyping feels like it is going to be the only sustainable way to produce responsive designs on a grand scale.

The still below is from a video about the Boston Globe's responsive redesign, and it shows their testing rig — lots and lots of devices with varying screen sizes, stuck to the wall in various orientations, all set up to show exactly the same page from the site at the same time. With this kind of test bench, and designing in code, you can immediately see the effect of changes across multiple devices and breakpoints in a way that would take hours to replicate in InDesign or Illustrator or Photoshop.



The Boston Globe's testing rig for their responsive design

Don't forget production staff

You shouldn't forget your content production staff either. We talk about end users loving their touchscreen devices, phones and tablets, but so do the staff at publishing houses. At the Guardian I always used to argue that from a standing start I could beat any journalist in publishing to the web. Whilst I was using the Tumblr app on my iPhone, they'd be struggling with their laptop, VPN and authenticating through the remote version of the CMS. Now speed isn't everything — accuracy is one of the ways that news organisations can distinguish themselves from the herd — but sometimes it is. In fact, for fashion shows, we ended up equipping the journalists with phones and Tumblr, and built a system to republish the Tumblr content on guardian.co.uk. If your staff are consistently getting a great, flexible, mobile user experience from the tools they use to publish in their spare time, a clunky desktop-bound enterprise CMS is going to look increasingly outdated to them.

Know your devices

You really need to know your devices as well. Managers who are addicted to their BlackBerrys and designers who idolise Apple are not in the best position to judge whether something feels native on an Android device or Windows tablet. When working on projects

for different platforms, I always tried to use one of the devices as my main phone for a few weeks, to really get a feel for how it operates. Little details like the placement of search icons or how social media sharing is integrated vary from platform to platform, and you want the audience to feel like your app or service has been built *for them* and *for their device*.

People talk about wanting to get a consistent user experience across a portfolio of apps and services. The user, in most cases, is likely to only use one or two of those platforms. The overlap between people owning iOS, Android *and* Windows Phones has got to be small. The much more important consistent user experience for the customer is that all the apps on their phone or tablet behave in the way they would expect them to *on that device*.

Look beyond your traditional competitors

In the news and media industry we still tend to compare ourselves to our narrow historical competitor set. Nowhere is this more apparent than in the UK's ABCe figures which audit "newspaper" website figures. It provides a league table of websites owned by people who also own printing presses, not a league table of news sites. Major players in the online news market like the BBC and Sky News aren't represented, not are destinations like MSN and Yahoo!. Despite being considered unsexy, and not particularly known for being news providers, their news services rack up millions and millions of page views.

Writing for TechPresident, [David Eaves recently spoke about his frustration when government online services are compared to each other](#):

"The problem is, Singapore and Canada, or the United States, or the UK for that matter, are not competitors when delivering online experiences to their citizens. Canadians don't compare the (terrible) online experience they get with the government to that of Singapore, or Sweden. Rather they compare their experience to Facebook, to HipMunk, to Gmail and Flickr. All the Accenture report did was take a group of laggards who generally deliver a crappy online experience, lump them together and rank them. Rather than tell governments their online performance was in crisis, it reassured them that all was well."

As an industry, this is what we do to ourselves when we declare "newspaper" websites to be something distinct and apart from the rest of the news sources on the web, or when we only judge the user experience of our tablet apps by comparing them to other magazines or publishers.

You probably don't need a "mobile strategy" or "tablet strategy"

There is a recurring internet meme of Russian Reversal jokes. You know the kind, based on Yakov Smirnoff's comedy routines from the 1980s: — "In America, you can always find a party. In Soviet Russia, Party always find you!" or "In America, you listen to man on radio. In Soviet Russia, man on radio listen to you!"

I think a kind of reversal is happening to our industry.

You might be sitting around debating whether your business needs to have a "mobile strategy" or a "tablet strategy". You might be pondering whether you should declare that you are "digital first" or "mobile first". You might be worrying about competitors who are pure digital plays without any of the legacy costs of owning a print operation.

You can debate all these things for as long as you want, but your audience has already chosen for you.

They've already gone "mobile first".

You probably need to start playing catch up.

“Taking Stern magazine to the iPad” - David Heimbürger

Following my opening talk at the event, David Heimbürger was speaking about a much more traditional approach to tablet publishing, in a talk about Stern magazine entitled “850,000 print copies per week, 7 million readers, and the challenge of reproducing a print miracle for tablet readers.”

David Heimbürger is Head of Stern eMagazine, and explained to us how the weekly magazine had gone digital on tablets. For those not familiar with the publication, he explained that Stern had a print circulation in Germany of just over 800,000, but a reach of nearly 8 million because it was a family magazine, and liberally available in doctor’s waiting rooms and the like. It is well known for stunning photography and wins awards for investigative journalism.

It is always great to hear at conferences stories where people have made mistakes or the wrong decision, and David began by explaining that in 2009 they attempted to rebuild the New York Times reader idea on the Air platform. This was going to be the future of their digital publishing.

And then the iPad duly arrived without the ability to run Flash or Flash-related technologies. The “chilling effect” of Apple took hold, and Stern ditched the whole project — and the money they had spent on it — in favour of using something that bolted more easily onto their existing use of Woodwing.

Their digital philosophy is to retain all of the articles and pictures from the print edition, but to display them in new layouts for the tablet, and to add light-touch interactivity. David showed how cover images were made to be animated, and how long features could be introduced to the tablet reader via teaser animations.

I did worry that at one point we were at risk of being told that the future of magazines was essentially PDFs with a few animated GIFs thrown in, but David Heimbürger sold me a little on the idea that these flourishes also served an editorial purpose. A profile of Apple’s Tim Cook on the iPad, for example, opened up with an image where his picture faded in from darkness. This was, David suggested, not just to add animation for the sake of it, but to illustrate how he had moved out of the shadow of Steve Jobs.

The editions aren’t simply static though. The games that come with the printed bundle are interactive on the tablet, with crosswords and Sudoku puzzles taking advantage of the digital format. There is also a dynamic list of the newest stories on the website included, and the picture of the day is updated during the week, even when a new edition isn’t available. David said that on the website these images are buried under a lot of content, but on the iPad they can show the photography off. It reminded me a little of the dynamic back page of the Guardian iPad edition that I worked on, which was intended to be a nod that by the time you had finished the day’s newspaper, the news agenda had probably moved on.

The sales figures for the Stern emagazine were, I thought, low. Given that their print edition has a circulation of 800,000, they are only shifting 16,000 digital copies each week on subscription, with an extra 1,000 single sale downloads. The magazine is available digitally on iOS and Android, but it skews heavily towards the iPad. Android sales only make up about 5% of the total.

And the production process involves a lot of man hours.

Stern goes to print on Monday, and Tuesday is spent producing the bulk of the digital edition. On Wednesday the release is finessed, and it is published on the evening before the physical product hits the newsstands. Getting the digital edition out involves a production manager working four days a week, seven graphic designers on the Tuesday and three on the Wednesday, a producer for the web links and video, and a quality manager testing the edition two days a week. Additionally there are two video editors adding up to ten days worth of work a week, and a producer for the HTML widgets and 360° special photographs.

Personally I think that sounds very people-heavy in production, but asked whether he thought they were taking the right approach, David Heimbürger gave a great answer. He said “to be honest we’ve never tried another way, and to have real market research you have to show both alternatives.” They had, he said, previously offered a straight PDF facsimile of the print edition, and that used to sell “about 10 copies”, so he was happier that the current approach was much better than that at least.

Asked “What is biggest editorial challenge?”, he made another great point. A lot of the content in Stern is feature driven and not particularly news agenda driven. It could, he said, often be published next week, or the week after that, or two weeks previously. In that context having a weekly digital edition that isn’t dynamic is not such a big deal.

“Condé Nast place value in digital reach over digital sales” - Jamie Bill and Jamie Jouning

Condé Nast were represented at the Tablet & App summit by the duo of GQ publisher Jamie Bill and Jamie Jouning. The two Jamies were showcasing the work the company had done to move into tablet publishing in a fairly short space of time.

Jamie Jouning said that print still “pays my salary every month” and that their publications are very stable. Digital wasn’t a replacement, but it was an opportunity. Jamie Bill was perhaps more strident, suggesting that tablet publishing was “a genuine game-changer”. They’ve also actually seen growth in the sales of a print title like GQ since launching tablet editions.

They were very much viewing their business through the prism of increased reach. With digital properties included, GQ reaches around 800,000 people in the UK, compared to a print-only reach figure more in the order of 350,000. Jamie Bill contrasted this with the viewing figures of Episode 3, Series 5 of Mad Men in the UK. Transmitted on Sky, the audited audience figure for it was 47,000. That week GQ had a massive feature with the leading actor, and Jamie Bill said that with that kind of reach, magazines were now in a position to compete with broadcasters for advertising revenue.

I must confess it wasn’t an angle I’d previously considered when looking at reports of Condé Nast’s performance. And certainly, given the increased production costs and effort with publishing the digital editions, I’d be disappointed with the sales figures. Nothing they showed appeared to be selling more than a few thousand copies of each issue digitally.

Nevertheless they’ve clearly got the budget to do some interesting creative work, as the video cover to their comedy edition showed. It also demonstrated that as a brand they have the kudos to get top talent in front of the camera to produce this kind of material, something that few publishers could pull off.

Jamie Bill said they were at break-even point after a first year of publishing tablet editions, and I’m assuming that one reason isn’t the cover price or the sales figures — which, after the 30% Apple tax and VAT always generate a lot less cash than you’d want them to — but the impact on the advertising market. The presentation showcased some interactive ad creative produced within Condé Nast titles for brands like Mercedes Benz, Bally and Louis Vuitton. They also charge advertisers for links embedded into the editions.

When I saw the interactive ads demoed though, I was reminded in parts of a talk I saw a in March 2011 at Hacks/Hackers in London, about [the production of The Times’ Eureka iPad app](#). Design Editor Matt Curtis spoke about the editorial obsession with having things that moved and could be spun around by the user, regardless of whether the user was actually going to *want* to spin things around.

A constant theme during the Tablet & App summit was the relationship between publishers and Apple. The Condé Nast team made it clear that they wanted their titles to have a presence on any newsstand in the digital world, and that iTunes wasn’t the only game in town. Nevertheless Jamie Bill said the company were “very grateful to Apple to enable us to be where we are today” and didn’t see any change in the power they wield in the short-term, but moves like putting GQ into the Amazon store showed that they were committed to sell wherever they could.

Jamie Bill said that in the end, with the shift to digital publishing, the biggest challenge hadn't been the technology or the monetisation or the marketing. It had been managing the people. It was a big transformation for the business, and changing the magazine design had put "a huge amount of pressure" on the workforce. They demonstrated this with an excellent visual stunt - the two Jamies unfolded a long strip of paper that represented all the individual pages of a magazine, followed by a much longer and more complex looped strip of paper that represented the work involved in preparing the digital editions.



Condé Nast stressed that their approach to digital publishing had increased workload

One thing that very much caught my attention was that they are obliged to include 95% of the print magazine content in the tablet version in order to meet the threshold for digital copies counting for their audited circulation figures. It reminded me very much of working in record shops during the eighties and nineties, where the rules on chart inclusion — and trying to dodge around them — were the reason the industry spawned multi-format singles and “limited” editions. Those releases didn't really have the audience in mind, they were all about manipulating the chart. Likewise, it felt like during the production of this type of tablet representation of a magazine, it meant you wouldn't care too much about tailoring the content to the digital format if it was going to mean you didn't hit the arbitrary 95% limit set by the industry.

Patrick Smith has written up his take on the talk for The Media Briefing: [“Don't panic: ‘Tablet publishing will ensure our future’ say Condé Nast publishers”](#)

When I think about the business choices that Condé Nast have made with their magazines, I am minded to think of [Karen McGrane comparing their approach with that of NPR's "Create once publish everywhere" strategy](#). She said of Condé Nast:

"It's like you see them saying, 'If only we could just take pictures of our magazines and put them on the iPad, then we can go back to the way it was in the 1980s when everything was great for our industry.'"

“Behind the curve - the media and the new App economy” - Stijn Schuermans

“Media publishers are behind the general developer population in targeting tablets, but intend to catch up” - Stijn Schuermans

Stijn Schuermans brought a welcome change of pace and an outside perspective to the problems assailing media companies in the digital publishing space. He is a Product Manager at [VisionMobile](#), a company who carry out research, and work on strategy around the app economy. He opened by saying he felt a bit out of place, as he was the first speaker on the day who obviously didn't have a media company background.

Stijn told us that his company's research showed media companies go through three distinct phases of adapting to apps and mobile. The “newbie” phase, he said, was when some bright spark decides that a company “must” have an app. They'll usually choose iOS, out-source the build, give it away for free, and not really have a business model behind it.

After that, they graduate up a level to being “street-smart”. Now they are looking at how mobile apps could support their core business, and it is the head of marketing who is driving the requirements for brand extension, or for having a presence across a range of platforms.

Finally, the company wakes up to the potential of the mobile future and is a “connoisseur”, realising that this could be a brand new revenue stream in its own right. The recently appointed Head or Director of Mobile (and/or emerging platforms) is the one issuing the rallying cry.

Stijn was also presenting the results of some survey work carried out which compared the position of media companies relative to “general” app developers. This suggested, perhaps unsurprisingly, that media businesses are a little bit behind the curve. 50% of “general” developers target tablet devices, but only 42% of media companies do.

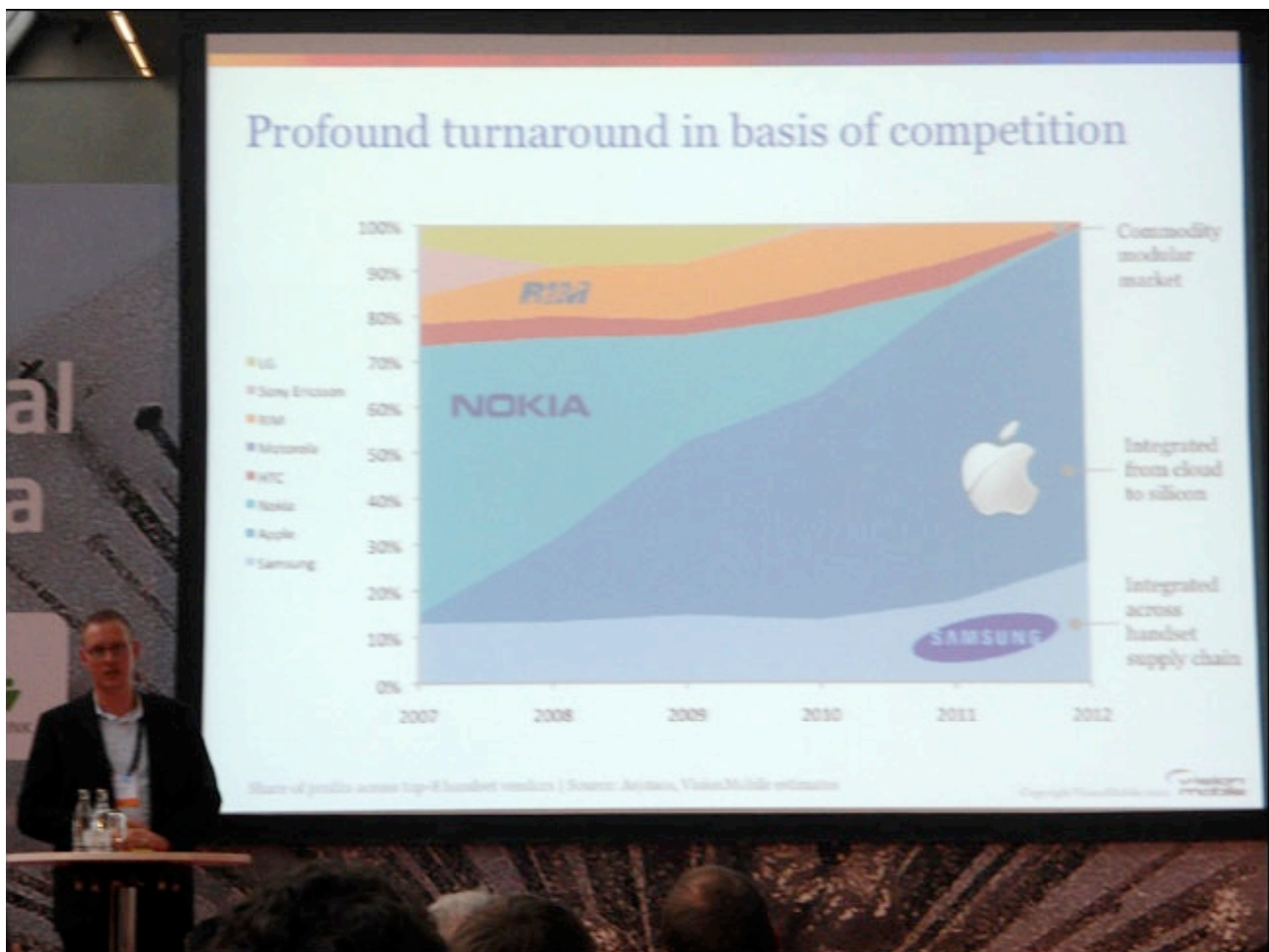
Media companies also lag in revenue terms, typically earning 15%-20% less than the benchmark levels of other types of apps. He also noted that subscription revenue was very low in the mix. Media companies tend to have apps with a business model based on advertising and brand awareness, which puzzled Stijn a little, as publishers have worked with the subscription model for print products for decades.

He also added that less than 10% of media companies currently have plans to tackle internet-connected TV as a platform, but it does at least appear that 1 in 3 intend to in the near future.

During his talk Stijn showed us a lot of charts, reminding us that there is an app for every occasion, and that even by the broadest definition, “media” only accounts for about a quarter of the apps on offer to smartphone and tablet users. He argued that the reason that iOS and Android have become so dominant is because they create a “positive feedback loop” between users and developers. Because there are lots of apps, users are attracted to the platform. And because there are lots of users, developers are attracted to build in order to reach that install base.

He suggested there were around 700,000 iOS and Android apps available, with a second tier of platforms like BlackBerry adding another 100,000. The number of apps creates a discoverability problem for users, and makes for a tough competitive landscape. This is one area where I think that big media companies need to be mindful of the advantages that they *do* have in the market — established brands and distribution channels that most start-up developers could only dream of attaining.

Stijn also showed this rather scary graph — rather scary if you aren't a particular fan of monopolies that is.



Apple is taking a monster share of profits in the mobile handset sales space

The chart depicts how Apple's dominance of the market in handset sales has effectively destroyed the profits of companies like Nokia and RIM. As much as we can fault bad management and strategy choices at those companies, it cannot be healthy for one company to have such a stranglehold on revenue generated from phone sales. Even if they *do* make pretty phones.

Stijn said that this scale of disruption was also threatened in adjacent markets like media, travel, and gaming. As Philippe Jannet and Caio Túlio Costa's talks showed on the day, some national markets have been more attuned to tackling this threat than others.

MobileVision make available a lot of their research, and Stijn recommended we read [Developer Economics 2012](#), a report on "developers, apps and the new mobile economy."

“Brazil’s newspapers close ranks against Google & Apple” - Caio Túlio Costa

Two talks on the day addressed the issue of national newspaper groups coming together to challenge the established digital distribution channels of Apple, Amazon, Google and the like. The first of these case studies came from Brazil.

[Caio Túlio Costa](#) is a New Media consultant and advisor to the Brazilian Association of Newspapers. He has over twenty years background in journalism, including acting as a newspaper ombudsman in the 1990s.

First off he set some context for the Brazilian market. Mobile phone penetration runs at 132%. The 255m mobiles in the country works out to roughly 1.3 each. It is expected that Brazilians will buy 2.5m tablet devices this year, and print circulation in the country is rising.

Brazil vs Google News

Caio outlined a battle that the Brazilian media industry had picked with search giant Google over their Google News product. About two years ago the newspapers collectively decided to “lower their participation” in Google News, and today you’ll see no major Brazilian newspaper results in [Google Notícias](#). At first the press asked Google to restrict themselves to just “one line” snippets from their content, and, having noticed no ill-effect on traffic, went further and asked to be excluded all together.

Caio showed a graph which indicated that being excluded from Google News listings had no impact on the level of traffic driven to the news sites by regular Google search. Google still drove 17% of the traffic to a title like [O Globo](#).

Whilst being impressed with the collective action, I did wonder whether the flat-line graph of referrals from Google meant that there was an opportunity cost to the newspapers from the exclusion. As digital take-up increases you might have expected the volume of search traffic to grow, not just stay stable. Or it may just indicate that Google News never had much of an impact in the Brazilian market. These are just quibbles though, and the Google story was merely the prelude to the main showdown — Brazil vs Apple.

Brazil vs Apple

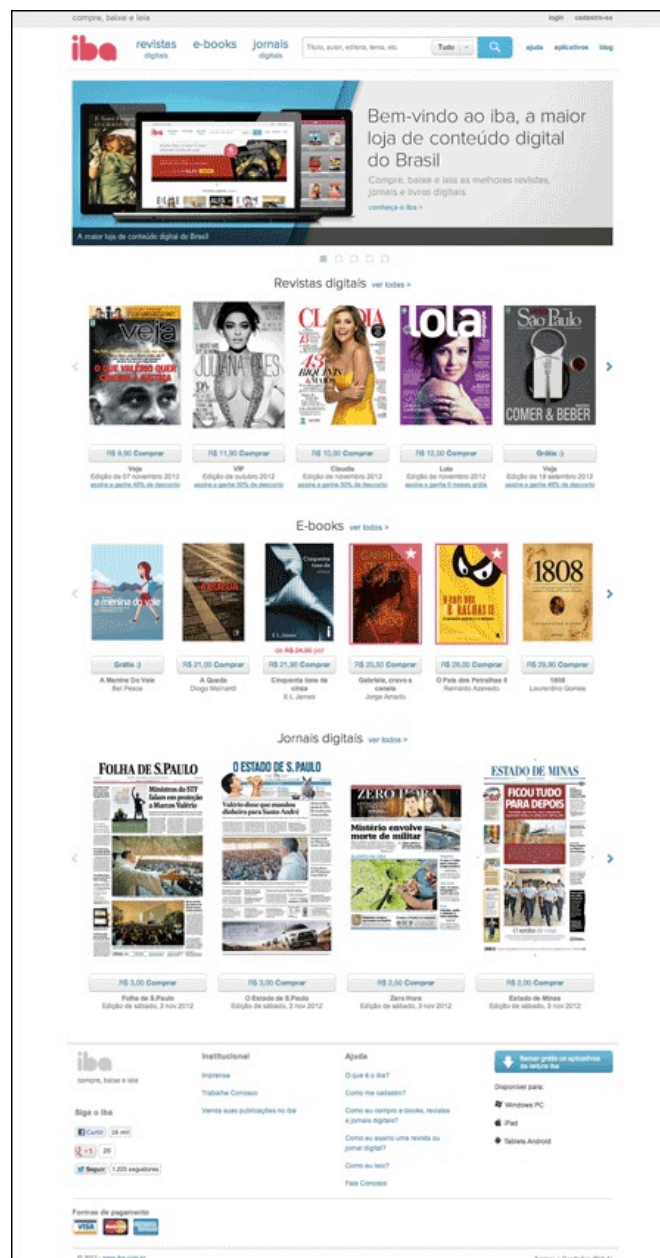
Apple went to launch Newsstand in Brazil as they have in many markets, but they found an unreceptive audience. Having started with contacting publishers on an individual basis, eventually Apple was forced into direct negotiations with the [Associação Nacional de Jornais](#). Apple proposed their standard terms — that they would take 30% of any sales, that they would own the customer data, but that they would “allow” the newspapers to ask subscribers if they could also have the data.

This proposal was completely unacceptable to the Brazilian newspaper industry. Aside from feeling that 30% was too high, they have a distinctive legislation issue. They are obliged under Brazilian law to invoice every subscriber at home, and so, even disregarding any point of principle, they *need* the customer’s data. Apple argue that publishers find that between 65% and 85% of users will opt-in to sharing their data with the publication which

is good enough in most territories, but that would still leave a proportion of people that couldn't be invoiced.

And it wasn't *just* the legislation angle. Making a point that should echo with publishers worldwide, Caio said that if there is a problem with the subscription, the customer doesn't go to Apple to fix it — they go to the publisher. And if the publisher doesn't have their details, how can they provide a decent customer service user experience?

At the moment, the situation is a stalemate. Apple have said that the 30% figure is an “international standard”, and that they will not modify the opt-in process to sharing subscriber data with a publisher, although they did offer to help with promotions that would increase sales. For their part, the publishers have instead launched [IBA in beta](#), their own national store-front for ebooks, magazines and newspapers.



“Launching ePresse to challenge Apple & Amazon in France” - Philippe Jannet

After [Caio Túlio Costa's talk about Brazil's newspaper industry taking on the might of Google and Apple](#), Philippe Jannet presented a similar story of collective commercial action in France.

Described by host [Christian Röpke](#) as “the godfather of paid content in France”, [Philippe Jannet](#) is Managing director of [ePresse](#) in France, an attempt to wrest control of distribution back from the likes of Apple, Amazon and Google.

Philippe has a long history in the industry in France, and explained that ePresse was an attempt to keep value within the industry. All of the national newspapers and many regional and local papers are now exclusively available digitally through ePresse. Well, I say all, but Le Monde has remained aloof. “Their problem, more than mine” explained Philippe.

He said that the ePresse obsession was to put the user first, stressing that they are not working for the media owners but for the customer. It is the user's comfort, choice, happiness that are important, because they are spending their money.

They haven't been afraid to borrow from their nemesis Apple however. Philippe thanked them for the lessons they had taught people in ensuring there was real convenience in the purchase path. Users can either create one ePresse ID, or sign in with a variety of social ID services, but “we don't ask for the name of your dog” Philippe said, stressing ease of use as vital to ePresse's success.

One of the principles is that the user may purchase a publication on any device, and then read it on any other one of their devices.

No co-operation with Apple allowed

Philippe Jannet was unapologetic about excluding from the platform any publication that also had a deal with Apple. “We are not just a business” he said, “we are a strategy.” Accordingly, part of the deal for publishing via ePresse is that publications have to commit to giving the service ad space on all their other platforms to help drive awareness of the service.

Publishers get 80% of the sales revenue, not the iTunes standard of 70% — “We are not Apple” — and the system is very flexible in the commercial models and bundles that it supports. Philippe cast the project in the role of the small player taking on the “mechants”.

One of the secrets of success was what one slide described as the “PDF + XML MIRACLE”. Papers that can't afford expensive tablet or mobile optimisation development are able to sell content through ePresse that they have produced as PDFs. ePresse transforms the PDFs into XML, meaning that they are able to tailor presentation to specific screen-sizes and devices, in order to provide a better reading experience than the frustrating pinch'n'zoom-fest that PDFs can often be on the smallest screens.

In closing the session, Christian Röpke, Managing Director of Zeit Online, said he was amazed that Philippe had managed to get all of the publishers “into one boat.” Similar attempts in Germany, Christian said, had struggled because of the fracture lines between

rival publishers refusing to co-operate. Philippe compared the scenario to rugby. If you are alone on the rugby field, he said, you can achieve nothing. But, “if you are together, you can try to win.”

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“Optimising the FT using HTML5 & customer data” - Steve Pinches

On Twitter I described [Steve Pinches](#)' talk as a “masterclass in making good call after good call and really using user data.” With typical modesty, he replied that hindsight is a wonderful thing. Nevertheless, as Group Product Manager for Mobile & Emerging Platforms at the Financial Times, Steve has steered the FT into the uncharted waters of breaking free from the iTunes store and going down the HTML5 web-app route.

Steve opened by reassuring the audience. “If we’ve learnt one thing from the talks so far today”, he said, “it is that this is difficult.” The path from being a newspaper to having a website to going mobile has not been clear to any individual publisher. Steve said that companies needed to not be afraid of making mistakes, and spoke of the paralysis that can grip a company when they are faced with a lot of big strategic choices at once.

The FT’s path became clear-cut as soon as Apple began trying to act as an intermediary between them and their customers. The FT’s business is all about their customer data, and Apple’s new T&Cs were a deal breaker. Within a few weeks they had rebuilt their iOS app using HTML5, and become the first media company to provide a full offline reading experience without a native app. It wasn’t an easy decision, and Steve recalled lots of existential angst in the company as they wondered if they might end up destroying their online business by taking this radical step.

But the numbers are impressive. They didn’t see a dip in usage and now, in Steve’s words, on mobile “we are making significant amounts of money, and it has become a key bit of our business.” 30% of FT page views come from mobile devices, and 15% of new subscriptions come via the mobile route.

Aside from the technical achievement of the web app, it was a relentless focus on optimising based on customer data that I admired in the talk. They’ve raised conversion rates to subscriptions on the site from 3.2% in 2008 to 8.6% in 2011. Their data analytics team is roughly as big as their marketing team. They analyse the behaviour of existing subscribers to look for the patterns of behaviour they exhibit, and when they see non-subscribers exhibiting similar behaviours, they know it is time to change the messaging on the site, and gently “nudge” them towards signing up.

They are able to segment their audience to a very granular level. If you are the CEO of a media company, Steve said, then their personalisation engine will suggest to you stories that other CEOs of media companies have read which you have’t yet. They can also report back to advertisers some fantastic detail of the types of people who have been viewing their campaigns.

Steve explained that they augment their data analysis with qualitative data too. The web app is littered with calls to action for user feedback, and they normally get between 300 and 400 emails a month full of ideas, suggestions and complaints about their digital services, which feed into the product backlog.

Steve wasn’t didactic about the HTML5 route, however. He said you need “the right horses for the right courses”. [The FT’s “How to spend it” app](#) is still a free download from the iTunes store. On Android and Windows 8 a small amount of code wraps the HTML5 web app in a native shell. They’ve even produced a version of the FT for the Xbox Kinect during a hack day.

Compared to the size of the production teams [other publishers like Stern](#) outlined for their tablet or mobile editions, the FT's set-up is very lean. Just one journalist is responsible for overseeing production on mobile and tablets. Steve said it was very important to have a strategy for how content gets to devices — they built a powerful API layer on top of their CMS which powers all their products. There is a rolling team of 6 to 8 developers working on the web apps, and Steve revealed that actually, when working on mobile, one of the usual rules of thumb of digital development has to be reversed — they need to have more QAs and testers than they have developers.

He hoped his own role would become unnecessary as the FT became more adept at having mobile services at their core. Steve Pinches urged businesses not to have a “mobile strategy”. He said you need “a commercial strategy with mobile in it” and a content strategy to support it.

He stressed that the FT were in a position to move “two levers” on their revenue — shifting from a reliance on ad revenue to becoming more focused on getting revenue from content, and shifting the balance from print to digital. If you are in the iTunes store, he argued, the only lever you’ve got to play with is “taking Apple out to lunch.”

“Windows 8: Opportunities for publishers” - Frank Wolfram

Frank Wolfram identified three key areas where he thought Windows 8 might make a difference for publishers:

1. Reach

He made the point that by 2016, Windows 8 apps are expected to have mounted a significant challenge to iOS in the tablet market. Whilst Android will continue to flourish on smartphones, analysts predict that the established install base of Windows within enterprises will lead to the development of a healthy market for apps on the platform. Tablets are being developed by a range of manufacturers at various sizes and price points, and the Windows 7 install base of 690m machines already dwarfs the 125m running iOS.

2. User experience

Frank praised the “content before chrome” approach of the Windows 8 “Modern UI”, and said that with functionality like [Live tiles](#) publishers were in a position to really take advantage of that colossal reach. He showed the [Bing media apps](#), positioning it as a great opportunity for publishers to get their content onto the desktop or tablet screen.

The example he showed involved the user noticing a key logo to indicate paywalled content, and then signing up to subscribe to an editorial service. He described this as “a nice user journey” — but I’m not so sure. It is lovely for Microsoft to have given US news providers this presence in the OS, but it did remind me a little of having something like Bloomberg news services automatically added into my bookmarks by default in IE. It didn’t make me click on it, because it isn’t a service I’d use, but it *did* make me slightly resentful of Microsoft making customisation choices on my behalf.

3. Flexible business models

Wolfram explicitly said that by being late to market with an app store, Microsoft had “learned from the mistakes of others.” The Windows 8 app store has virtually every combination of business model available to you, from free apps, to paid apps using Microsoft infrastructure, to supporting entirely third party commercial models.

If you sell your apps using Microsoft’s platform, like Apple they insist on a 30% bite of the cherry themselves. However, Microsoft are capping this to the first \$25,000 of lifetime revenue on an app, and after you reach that their share drops to “just” 20% of every transaction. They also offer in-app purchases, and an off-the-shelf ad platform. To [publish into the Windows App store](#) companies need to pay a \$99 registration fee, with the cost pegged at \$49 for individual developers.

“Building De Standaard for Windows 8” - Johan Mortelmans and Twipe

Johan Mortelmans, Digital Innovation Manager at Corelio Publishing in Belgium, went on to present a case study of building a Windows 8 app for De Standaard in Belgium. Given my recent blog post about [the tumbling circulation fortunes of the British national press over the last five year](#), I was astonished to see a chart that showed their circulation had *risen* by 22% over the last decade.

[De Standaard](#) follow what they call the 0-1-7 model. “Zero” is for commodity news that is published as soon as it breaks. This is always free. “One” is for content published one day after the news, where the paper adds value and analysis. This is paid for content, as is the “seven”, which represents weekly magazines and supplements that are published throughout the week.

[They partnered with Twipe mobile](#) to build their Windows 8 app, and wanted to “create the newspaper of the future” — to go further than simply producing a PDF page-turner, whilst also being conscious of the cost. Johan said they believed it was important to be in the Windows 8 marketplace early on in order to learn about what works and what doesn’t, and to help them be recognised as an innovator.

They’ve taken the approach that there should be a unified user experience across their product portfolio, and so they’ve not gone overboard with native looking features. I don’t myself agree with this approach. I’m of the opinion that for the majority of users a “consistent” user experience means that all the things on their phone or tablet feel native and use similar interaction patterns, not that they can hop from one brand’s product across five devices and notice that they are all designed similarly.

The Twipe platform itself looked like a solid idea though, with it using responsive templates and HTML5 to deliver the product.

“Toronto Star’s Ad Lab for digital advertising innovation” - Kate Collins

“Saying no to ideas is just as important as saying yes to ideas.” - Kate Collins

[Kate Collins](#) is Managing Director, Emerging Platforms & Products at [Star Media Group](#) in Canada, and she was presenting a case study of some innovative work they’ve done in collaboration with advertisers, exploring how advertising might work in the future in the tablet edition of the Toronto Star.

30% of their traffic now comes from some kind of mobile device, although Kate conceded that the money wasn’t quite “following the eyeballs” yet. She talked about an earlier attempt to get a tablet product up and running for the Star, which they invested a lot of money in. However, as the project progressed, they realised there were a lot of unanswered questions about the production and workflow. They decided to take a step back and address just one challenge first, namely “is there a business model in this at all?”

The solution they came up with was to have a single monthly sponsor of [their tablet optimised experience](#). Having just the one deal simplifies a lot of the business considerations around selling ad space. Kate recounted that actually, when they had first been trying to get ad agencies interested in booking space on a tablet, she’d sometimes had to end up lending the potential client *her own tablet* for a week to show them what it was all about, because at that point take-up of the devices was only amongst early adopters.

She had a great one-liner about dealing with advertising agencies looking to run innovative campaigns:

“Everyone wants ‘never been done before’, but no one wants to go first.”

Realising that they had an issue trying to develop great ad campaigns on tablet, they formed an “Ad lab”. They co-fund campaigns with an ad agency and a client, and try and work out what they can do that is different from simply putting digital display ads onto a smaller screen. Some of the “proof of concept” style campaigns she showed included an ad which transformed into a mini-game, and an interactive game of roulette designed to sell auto recovery services specifically to women.

Christian Röpke, Managing Director of Zeit Online, asked how this approach scaled — it seemed like a lot of effort to put into individual campaigns. Kate said that they could only work on between three to ten of these a year, but that the campaign itself isn’t really the main outcome. They are judging themselves on whether they get good data, a good case study, and better relationships with ad agencies and clients. She said that when you start this process, your conversation with a chief marketing officer shifts from being about whether they are going to place some ads, to being about what the Toronto Star can do to help solve their business problems. It is an entirely different conversation, one that was only enabled by having the tablet option on the table.

The tablet edition had also had a beneficial reputation effect with readers. They’d had people phone up the newsroom to express surprise that the Toronto Star could have done something so innovative. User engagement with the product is high, Kate explained, telling

us that the average number of page views per unique user was seven to ten times higher than the engagement levels on other platforms.

“A journey into the New York Times mobile and tablet strategy” - Alexandra Hardiman

“I know the word process is not a sexy word, but we’ve been working on it a lot and it has made a real difference.” - Alexandra Hardiman

[Alexandra Hardiman](#) is Director of Mobile Products at The New York Times, and whilst her home was busy being wrecked by [Hurricane Sandy](#), she was in Frankfurt gamely telling us about the paper’s mobile products and strategy. I was delighted to hear lots of talk of it being user-centred. She admitted that the shift to a UCD approach was “a huge challenge”, but talked about how they’ve done a great deal of cross-platform research and developed mobile personas to help them shape their projects.

She said that most people in the room could easily imagine a product development process where the requirements of the editor or of the advertiser were at the top of the pile — it is much harder for businesses to *consistently* put the needs of their users first. There is a real bonus for older news organisations though if they do, as she explained that their research shows that mobile users tend to be much more loyal to traditional established media brands, than those which have sprung up as internet-only operations.

More than a third of New York Times traffic now comes from phones and tablets, and she said that when you add mobile into the traditional mix of where people get their news from (TV/radio/websites/paper), you really *do* add it. The presence of mobile *increases* consumption, rather than cannibalising it from another platform. In particular they notice additional usage in the evening, which is fantastic for an organisation that traditionally reached the audience first thing in the morning, and then didn’t see them again until bright and early the next day.

Alex said that the new digital subscription bundles the company had introduced around a year ago had exceeded expectations, and that between the NYT, International Herald Tribune and the Boston Globe, they had 592,000 digital subscribers. One question from the floor queried the extent to which these were fully paid up members, or people taking trial periods, but it was pointed out that most overall print subscription figures also include an element of people being on trials or introductory offers, and nobody queries that.

Alex was, as far as I recall, the only person on the day to mention switching anything off. She explained that a three monthly review looks at how well NYT mobile products are performing against a matrix of measures including reach, engagement, revenue on both subscription and on ads, the value to the paper’s journalism and the level of innovation involved. She said that sometimes it just becomes clear that there are apps you need to get rid off, and once you have put them through the “sunset” process, you need to keep the lessons fresh in your mind to avoid making the same mistakes again.

The mobile team at the NYT are now fully co-located, and have shifted entirely to agile development. Alex boasted of having done 55 app releases in the last 12 months, which I think judging from the questions and some tweets, some people in the audience took to mean that the Times had 55 products, rather than having issued 55 updates. Their portfolio is still a mix of native and HTML5 apps, and Alex said they are not planning to abandon the iTunes store or native apps anytime soon. Their HTML5 iPad app being used as a “sandbox” for design ideas.

She showed some experimental interactives the paper has produced as part of “mobile first journalism”. This isn’t, she stressed, the act of cutting down articles into smaller words, but the act of commissioning and presenting stories in ways that are suited to the form factor of the smaller screen. An election predictor, which shows Obama and Romney alternately grinning or grimacing as you choose which swing states are going to end up declaring for them was the kind of fun interactive she couldn’t imagine the paper having developed for anything other than the mobile context of use.

One point I whole-heartedly agreed with was Alex’s assertion that app design needed to reflect the native features of the phone. Like many people, she said, the New York Times initially thought it was easier to take their existing iOS designs and do a retro-refit of them for Android, but the experience just wasn’t satisfactory. They ended up hiring specific design talent for the Android platform. As I said in my own talk on the day, [know your devices](#).