

European Technology Media:

August 2018

Fragmentation & Evolution



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01 Foreword

Technology media in Europe has been through more change in the past two to three years than in the previous 30 to 40. Huge shifts in advertising revenue streams, technology evolution and the rise of non-conventional media covering tech topics has brought about a fragmented, diverse and complex landscape.

Which sounds complicated. And it is, but equally the fundamental editorial principles of what makes a good story and why people should care have not changed.

Media in each country is, of course, different. While some publishing houses are international, the competitive landscape at a national level and the editorial conventions in place mean that each market needs a more bespoke approach than ever, and an in-depth media understanding.

Stories, and the messages they aim to convey, may be universal, but the content required to make them gain traction at a local level, and with each publication, channel or network, is evolving fast. This is a big challenge for brands that have finite resources for creating and reworking content.

We hope that this report will be a useful summary of the technology media landscape in Europe, and illustrate how the most effective balance can be struck between media requirements and content development.

The media perspective:

Brands are being asked to dig deeper for better stories. Here's what other publications are telling us about what's going on:

“Despite Alphr being a B2B publication, our business readers now think like consumers.”

Ian Betteridge
Editor, Alphr

“We’re experimenting with new formats and features constantly. We’re like an API in ourselves, starting our own bot studio to experiment further with conversational interaction.”

Jason Karaian
Editor, Quartz

“We know we need to make the future more human, and that means we need to make the stories we run more appealing to humans.”

Oliver Smith
Senior Reporter, The Memo

Why the attention economy demands sharper stories

Rapid shifts in the media landscape, changing communications requirements for tech brands and the heady pace of change are enough to keep all of us on our toes.

According to Bob Safian, who edited business magazine FastCompany for 10 years, highly-valuable editorial opportunities are all around us, but capitalising on them calls for hard work and a deeper understanding of story appetite.

“The volume, fragmentation and pace of media, and how we all consume our content, have given rise to the attention economy. There is greater value in capturing people’s attention than ever, but there is a constant battle for that attention and to remain relevant,” he said.

“The business model that media had relied upon for so long is completely broken – there is a new kind of competition for eyeballs. Every editorial decision has competition at its heart, because content and how people react to it is now far more measurable. A story that has moved through the right social and digital channels drives more value, and media businesses are fighting hard against their competitors to get that right. With more

data available, the interest that each story generates is now plain to see. Both journalists and the people feeding them content for their consideration are having to work harder to titillate and captivate their audiences.

“The rigour required to deliver on those expectations is greater than ever. The cultural hotspots that drive story interest are moving all the time. More controversial storytelling generates more attention, which means brands need to embrace more creativity and bravery. While many of the principles of what make a story have stayed the same, the intensity and speed of editorial competition have upped the stakes massively.

“Brands are being measured in the attention economy every day – they have to compete for emotional relevance. They will only stand out if their stories are sharper, and the way they tell them is both truthful and compelling,” he said.

02 The Big Trends

Broadening of Technology

Technology used to be primarily purchased and applied by an organisation's IT department, which oversaw the budget for that and determined which products and services would be used. The rise of personal computing began to change that, the coming of the mobile phone accelerated it. Now, the widespread use of applications, familiarisation with technology services and extent to which our daily lives depend on online services for work and personal matters means that the IT team's role in buying and running technology has evolved markedly.

Computing now has a much broader remit than in the past, meaning many more people have a say in what technology they choose and use.

Technology can still drive benefits across the organisation, but increasingly the impact is felt at a departmental or functional level, and as levels of automation and artificial intelligence continue to increase across business processes that will invariably be driven deeper into those trenches.

And then we have the more human factors. People are now far more au fait with the technology that they use each day, making it more accessible and much more likely to crop up in conversation. To the extent that boundaries around how the use of devices may impact family life are more in the spotlight, and the relationship that we may have with 'the machines' in future has become a major talking point.

What does all of this mean? Well, technology is no longer a niche, a department of its own making, just an operational function or a complex thing that many people shy away from



Tech is now part of the fabric of the everyday at work and in our personal lives, meaning that the way it features in editorial coverage has evolved as a consequence.

Rather than a broad swathe of business-to-business enterprise technology or IT magazines online and in some cases still in print, that media is now more news-driven, provides deeper analysis and has diversified its formats in the online world. Rather than a ring-fenced technology section in national media that was business-to-business (B2B)- focussed, coverage has broadened to conceivably any part of the publication. Moving image content is no longer just the preserve of broadcast media. And all manner of

hybrid manner of hybrid media has sprung up that cover technology and innovation – entrepreneurially-focused media, lifestyle-driven publications, feature-driven sites and many with a more international focus than was ever the case in the past.

It all means that technology stories are more difficult to categorise, but that there are far broader opportunities for telling them. It requires more thought though, and more insight-driven creativity.

Niche Publications Need Paid

The technology-focussed media in Europe, at least those that focus on a B2B readership, have long been dependent on advertising revenue. With the shift to online publishing, those paid media revenue models have fragmented and diversified, but in some cases they have evaporated.

All media has had to take a long, hard look at commercials. Each publishing group or individual magazine has its own view on what works best, and many have learned by experience over the course of the best part of a decade during which publications have closed, merged, shrunk, relaunched and made their debuts. Media has always evolved, but at nothing like the pace of the past few years.

The areas of technology, industries and topics now covered by media may now be broader than ever, but they also run deeper: niche publications may not cover areas like software operating platforms, network equipment and embedded design considerations to the depths that they used to, but new niches have emerged as technology has evolved. And those niches can have a direct commercial requirement of the technology providers that sell into them. In many cases, without some form of advertising, sponsorship or partnership, opportunities for 'free' editorial are either thin or non-existent.

It may not officially be pay-to-play, but effectively that can be what it comes down to.

While that may not initially sit easily with communications used to purely earned editorial, the sophistication of many commercial services offered by publishers has moved forward, so content run as editorial may link to a promoted event or other call to action, and be amplified to drive engagement via social channels, for instance. Equally, media are far more open to bespoke partnerships that match the needs of brands directly, and have more data to share about how those investments perform.

All of this has combined to blur the lines between editorial and advertising. That line may not have always been laser-cut in the past, but the landscape today does give greater potential for direct measurement of value, and does have the potential for more productive alignment between 'earned' story and promoted investment.

What remains the case, though, is that a strong story will still stir a better reaction from audiences than a weaker one.

Those stories just need a robust approach to media planning beneath them, and to be activated in close alignment with paid media, where paid is applied.

Co-creation for Long-Reads & Features



Paid, part-paid or unpaid though, media content about technology in Europe is seeing a resurgence of interest in more in-depth, considered, long-form articles. While news has always been short-form and is increasingly read on a phone or tablet, longer pieces that take days to research and write rather than minutes, and that aim to give more depth to topics or cover uncharted waters, have become a more prominent feature of technology-covering media. Particularly for newer, hybrid publications that take a less conventional approach to tech topics.

Increasingly, those longer pieces may be published as a series across several weeks or months.

And in many instances, they may be co-created – editorial content developed in conjunction with a brand or organisation, that either gives access to data, facilities or other information in order to bring a story to life, or may partner to create something.

That could be a purpose-driven exercise, putting a theory to the test or gaining access to expertise in a new way.

True, companies have long looked to earn quality editorial by providing unexpected access to people or information, to give a 'behind-the-scenes' view. This approach goes much further though, through active collaboration between editorial team and brand team to co-create and co-produce – within reason – the resulting pieces by investing their time and (in some cases) paid promotion by the brand in order to produce more engaging content.

Features, long the mainstay of pre-scheduled advertising in the technology media, have at the same time evolved from a fairly predictable and static formula to something far more dynamic and bespoke.

In part, the pace of technological development and the need to peg features in some way to the current news agenda rather than determining topics 12 months in advance has shaped that. But so has the need to develop more compelling, differentiated content that drives eyeballs and supports paid media in broader ways.

This all means the communications team need a broader-minded, fresher approach to story development that applies more creativity to campaign development and the approach to individual, higher-value landmark articles.

However that happens, the point is that while editorial boundaries and controls must still be respected, the collaborative approach to compiling content is now transparent, and more innovative.

Customer-Centric Content



The customer – the perennial challenge of every communications team in technology. So many media want to write about how a business or individuals are actually using tech, rather than the company that makes it. In some cases, whole publications will not talk to the tech vendors and concentrate only on the people who use it.

That hasn't changed, fundamentally.

What has changed is that in many parts of Europe, media that used to cover product stories and customer stories to a fairly equal degree have now swung predominantly towards customer-centric content.

They want to understand how technology is helping to overcome a business challenge or create a benefit rather than wanting to understand the products at a technical level.

Beyond this, media are wanting to cover the customer story – or stories – in more depth. While the challenge/solution/results formula still has its value, publications want to better understand issues like the technological choices that were faced, the impact of market forces on accelerated technology deployment, the pressures executives faced in driving change and the human implications of the adoption of new technologies in the workplace.

This means there's a need for more lateral thinking when the customer story is developed, so that it can be told from multiple angles in ways that suit the editorial needs of each target publication,

And potentially a more collaborative approach with the customer to plan how those stories should be told, and what perspectives all parties want to bring to them.

For the communications team, this means creating understanding within the organisation that the appetite for technology product news and information from media across Europe is much-reduced compared to in the past, making the editorial opportunities limited.

While media varies across market and not every publication has shifted its focus from hardware or software to the people using it, it's centrally true that as product interest has waned, so customer story interest, and the ways in which those stories can be told, has risen.

Social, Search & AI



It's no longer just as simple as getting a story or a campaign published by media though. Joined-up planning requires the lifecycle of that content, and the way in which it is shared and found, to be important considerations too.

From an integrated communications standpoint, the primary consideration tends to be how editorial content can be shared in ways that drive further awareness and engagement across social channels. While the phenomena of fake

news and the well-publicised concerns about the way in which news content is served and reader habits tracked on social platforms have dented confidence in social as a news source to some extent, conventional media still gains broader traction for stories by sharing them socially. Journalists get involved too, driving further debate and engagement. Being able to plan how a publication is likely to treat that content on social channels has become an important part of the mix.



Alongside that, while search has long been a central consideration, and sometimes a desired outcome, in editorial planning, understanding which publications are likely to drive the most favourable search outcomes and understanding the role that search plays in amplifying positive news has become an important area of expertise, particularly when it comes to executive interviews or content around topics that are intended to stand the tests of time.

Artificial Intelligence (AI) is something of a new frontier. Algorithms may give media publishers and social networks the ability to serve content to readers or viewers based on their prior consumption habits and other openly-shared data, but the possibility for voice recognition technologies to provide news and feature content at opportune moments, for example, points to new ways of providing relevant editorial and advertising content.

We have only just begun to scratch the surface of that, but clearly

the capability to get content into the eyes and ears of willing audiences in more relevant and timely ways

has huge potential

providing that's what people have chosen to enable.

These are all examples of how technology can get the information to the people in different ways, rather than them actively seeking a regular media source and relying on that. They make for shifting power bases and can bring into question the integrity and judgement around quality editorial. But like the onset of the first newspapers, radio and then TV

they change the nature of how people can be informed and entertained through media.

Many publishers have well-defined approaches to search and social, but their content production and communications teams need to be conscious of them in their planning, activation and measurement, while the progressive growth of AI only compounds the issue.

03 The Markets



Europe is a region of 50 countries. Yes, 50. Even we would struggle to name them all, and they range in population size from nearly 83 million (not counting Russia) down to a shade less than 500,000. While all face the same global economic challenges and are impacted by global technological evolution, the role that tech plays in everyday lives, the way it is purchased and used by business and governments, and the legislative and political environments in play vary markedly from one nation to another.

We've looked at some of the larger markets in Europe, where clients typically want our advice and where we work to drive value for them through editorial, to better understand how the media landscape is evolving at a national level.

UK

The business media in the UK isn't easy to define, spanning national and regional newspapers, TV, radio, management magazines and top-end vertical media, as well as some social channels. Equally, the nature of B2B editorial is very different across industry sectors, and while the main focus for brands may be the nationals, those vary widely in their format, political stance and readership.

One big factor that has shaped the way national newspapers cover technology in recent years is broader coverage and a more personal focus on how tech is impacting people's lives.

Like tech itself, technology topics in the nationals have gone mainstream, with news involving the largest tech firms now just as likely to be one of the main stories of the day as the lead story in tech section.

Primary Business Media

Whereas in the past there was a fairly blunt instrument approach of the five or six tech giants being the main news priority given they drove the most eyeballs online, now the range of coverage is more measured, with national journalists more willing to look in-depth at examples of innovation, British success stories through technology, and lifestyle-led stories.

In short, editorial leans towards the human implications rather than tech industry news.

Coverage within business press has also become increasingly difficult to achieve though. Many titles have a more regional focus within the UK or prefer the news of smaller businesses, typically those that are UK-based.

One of the best ways to gain coverage is through news-hijacking, reacting to breaking news and offering an opinion on it, though having a relevant and UK-based spokesperson is important.

For internationally HQ companies, having a UK spokesperson that can provide quick thoughts on a subject and sign-off comment immediately, is essential. There are more clear-cut opportunities for profiling executives in broadcast media - this often means jumping on a current trend, or being able to talk about a business in detail, from a C-level perspective. Examples here are CNBC's Squawk Box, BBC World Service and Inside Track, and Bloomberg's video interviews.



Trade/Technology Media

The UK's extensive and intensive tech trade media has gone through massive upheaval, with titles opening, others closing and many slimming their editorial teams. The landscape is now far more diverse than it was in the past and there is a greater variety of content required for success. Many media titles are looking to take a truly new approach to coverage in order to offer something different, and gain readership in order that their brands can drive paid media beyond conventional advertising.

Many of the main publications are undergoing editorial restructures, in which publications are largely run by sole editors and freelancers are brought in to help for longer features, such as the richer content now featured in the likes of Silicon UK, PCR, Enterprise Management 360 and IDG Connect. As a result of smaller editorial teams, many journalists are now moving into freelance work, meaning they are able to cover more publications. The main change here is that stories are more feature-led, and getting journalists out of the office for media events is more difficult. Having strong customers, keynotes and expenses for this can often help the process. Additionally, getting journalists to meet company executives is more difficult today, unless they have an unique point-of-view on a current new topic or trend.

The UK's tech media is not very receptive to product news or company announcements, instead being more interested in how a product/or solution can benefit customers. ComputerWeekly, Computerworld UK, Diginomica and Computing are just a few of the publications that prefer customer interviews over vendor-centric news. These must be UK based customer and spokespeople, or else be large global brands relevant to the UK.

Bylined articles are also on the decline, but also more journalists are writing longer features themselves, compiling views from industry leaders in the process.

Different vertical titles within a tech focus do offer more opportunities for bylined articles, and they are more traditional in their outlook and more receptive to press releases. For the channel, there is also a range of executive profiling opportunities looking at personal lives and their work within the channel.

Hybrid/Lifestyle Media

This is where the action – in innovation terms – has mostly been in the UK in recent years.

New titles have popped up that offer a blend of tech-focused innovation coverage, that take a broader view of tech well beyond IT, and that aim to give broader, deeper perspectives through more long-form content, with less news.

Some of the titles within this space include New Scientist, WIRED, Alphr, Digital Spy, The Verge, T3 and HuffPost. Titles such as these are looking for future-gazing features or interesting views on breaking news. Topics include transport, culture, politics, gadgets, technology and business. BuzzFeed, Mashable and Unilad are also new titles with a strong presence and readership in the UK, led through having content applicable in consumer's daily lives and also promoted through social platforms

Main Drivers & Changes

Overall, the range of editorial coverage has increased as the ways in which more fragmented media cover tech has diversified. That's great for brands which can pursue earned media more laterally and tell stories about themselves and their audiences in more ways, but does require careful planning and applied expertise around content creation.

Editorial has become more difficult to achieve than ever before, with paid-for opportunities in the form of sponsored articles or wider commercial opportunities often needed to help brand presence. Most of the largest technology companies are already doing this now. Speaking opportunities at events has also significantly shifted to a paid-for model. Print media has shifted online and search is an important consideration that is driving the need for more long-form content. Stories also often need to have strong social media sharing potential, with video becoming an important ingredient in that.

Key Take-Outs

01

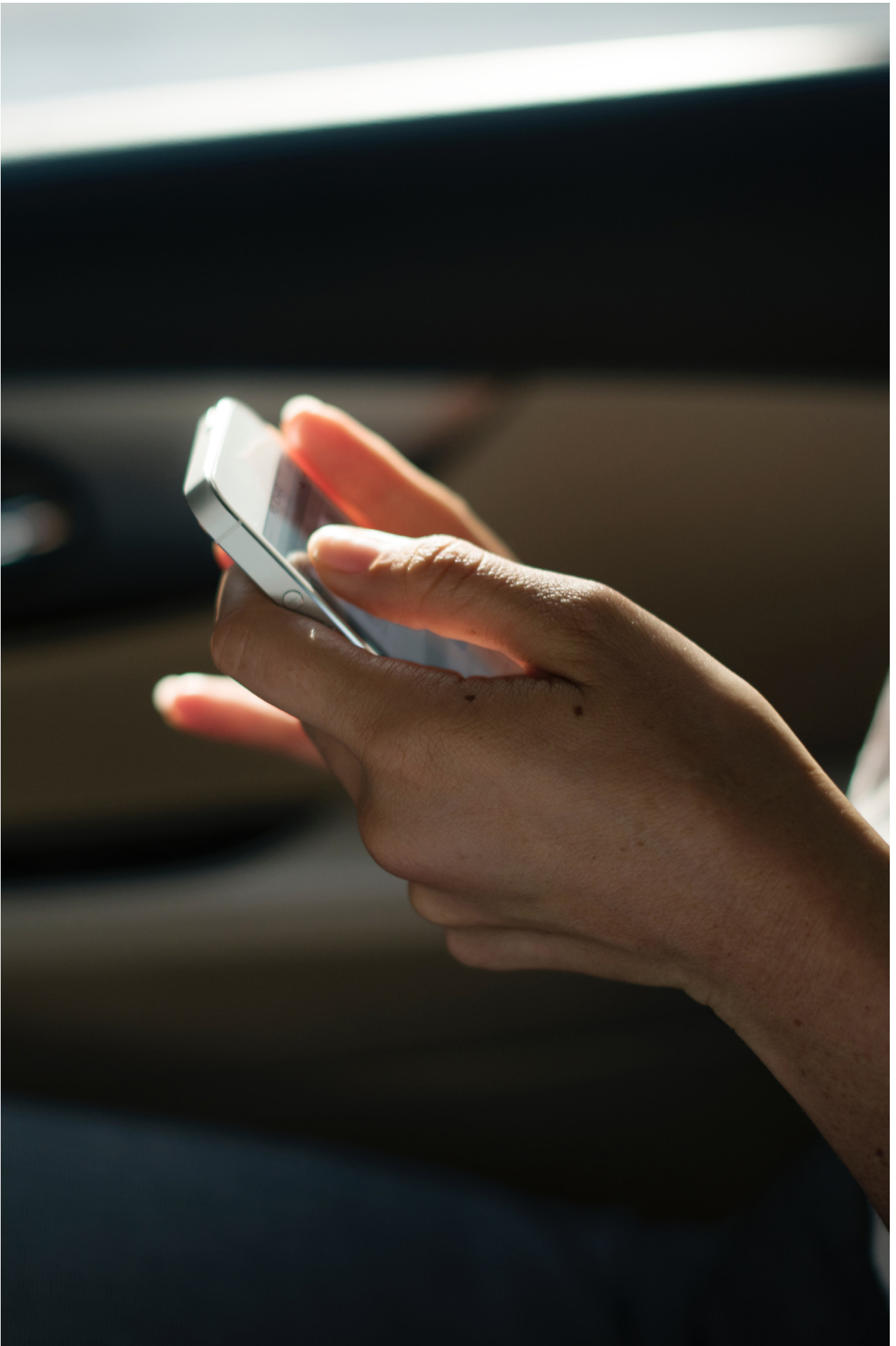
Journalists want stories about people-centric stories rather than tech industry news

02

Rise of new publications taking a long form content approach

03

Editorial opportunities more limited; brands need to think carefully about broader content creation



Germany

Primary Business Media

Business media in Germany cover a multitude of different formats, including news weeklies, national and regional daily newspapers, Sunday/weekend papers and those media focusing on economic news, both dailies and weeklies. In addition, there are all-news TV channels, which report on business news. Most news weeklies, national dailies and economy-focused media now have dedicated technology editors or even teams. This is a significant change to just a few years ago, when technology was subsumed in the science department and was only one topic for an editor to cover.

The growing importance of technology as part of the digital transformation of German businesses has made it of greater interest to this media segment. In addition, technology has also become pervasive in people's personal lives and hence is of higher general interest. Technology companies are hence more sought-after as topics to report about. While the largest tech businesses – such as Microsoft, Facebook, IBM, Apple and Google – are still being reported about a lot, other enterprises are being covered too. These can be start-ups with a new business model or more traditional companies, which are changing their business model or can discuss other interesting changes and developments.

Broadcast media, however, are a different story. While Germany has two news networks (N24 and n-tv), they do not report much on technology companies outside the 'big five'. This might change in the future as they need to adapt to the continued growth in importance of technology businesses.

Trade/Technology Media

Germany has a broad landscape of technology media, including consumer technology, B2B technology (both technical and more focused on business benefits), telecoms, and those focusing on the channel. Germany's technology media has largely escaped the upheaval other countries have seen as circulations have dropped, though the number of journalists per publication has declined.

Except for well-established media like Computerwoche or c't, the editorial staff consists of three or four journalists. Most hire freelancers to cover certain topics. On the other hand, by-lined articles provided by technology companies are accepted regularly if they fulfil journalistic standards.

Most journalists do not have the time and have too many topics on their desk to be specialists.

For them, it is a win-win situation: media receive content free-of-charge that covers topics their readership is interested in, while brands can publish the key messages without much of a filter to their potential customers. Interviews, either in-person or by phone, are on the decline with these media. A notable exception are trade shows, which media still attend.

Print is still much more relevant than in other countries, though there are a few successful online media such as silicon.de, TechTarget, ZDNet and the Insider franchise.

Hybrid/Lifestyle Media

Most lifestyle media are looking for new technology gadgets, such as smartphones, loudspeakers, tablets or headphones. Outside of certain hype product categories, technology is not a focus for these publications. They often publish consumer product reviews – German readers in general are informing themselves online and in print media extensively. Reviews are a major source of information for them before reaching a buying decision. Therefore, each issue of publications such as GQ, FitForFun or other male-targeted media carry reviews. Publications more targeted to women feature fewer reviews and are topically more focused on short reviews, which are less about features and more about style and usability.

Otherwise, technology coverage is usually restricted to short product introductions or the inclusion of well-designed products in photoshoots, such as Christmas gift guides. Outlying media are the likes of Wired and BusinessPunk, which focus on technology, but often on the people who develop technologies or run start-ups or enterprises with new, interesting business models.

| Main Drivers & Changes

Germany still has a vibrant landscape of print media compared to other countries. Often, German businesses still value print coverage more highly than online coverage. Online-only media such as TechTarget are popular, but are in the minority. Each region and city has at least one local or regional paper which the 40+ aged population subscribe to, whereas millennials check the news online. However, a lot of readers are paying for online subscriptions or cross-over models of their favourite papers or newswEEKlies.

While fewer new publications are being founded in Germany, it is a symptom of the already well-saturated media landscape. The most successful new launch during the last few years in the news weekly category has been Frankfurter Allgemeine Woche, which is being authored by journalists from national daily Frankfurter Allgemeine Zeitung, which is a well-respected paper with a long tradition. Hence, its weekly edition with more in-depth articles already had a certain cachet which transferred from the daily newspaper.

Editorial has become more difficult to achieve than ever before. Paid-for opportunities in the form of sponsored articles or advertorials, or other opportunities including dedicated micro-sites on online publications, web chats and video content, have been developed by publishers who need to find new ways to generate revenues outside of traditional advertising. A lot of these opportunities straddle the divide between advertising and editorial content: while technologies are presented in a web chat, for example, the focus is on providing solutions, not pushing products openly.

| Key Take-Outs

01

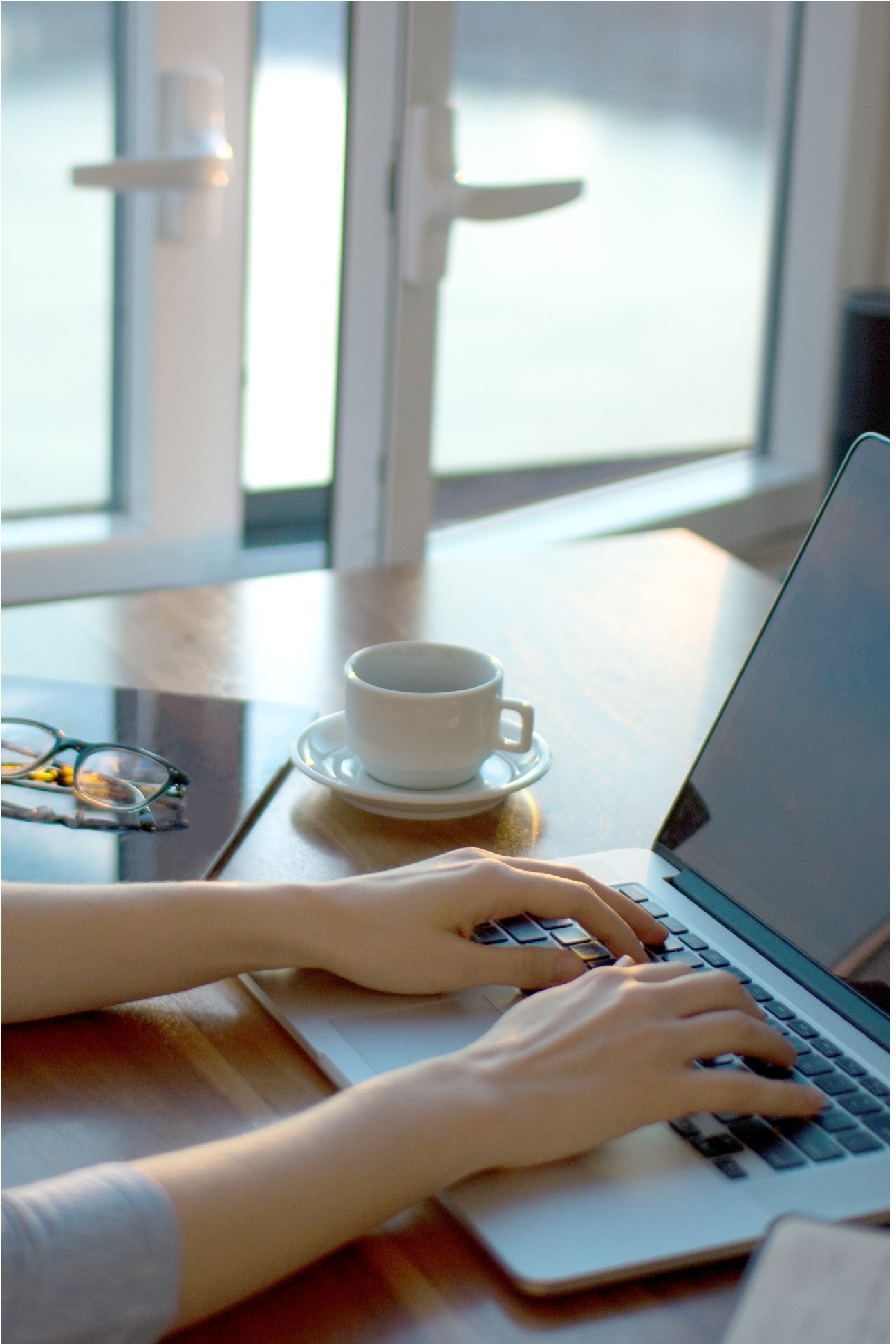
Technology media do rely on by-lined articles that tell specialist technology stories

02

Print media is still going strong, even in the face of the rise of new online news outlets

03

The increasing need for publishing revenues means brands need to remain open to paid-for partnerships with media; new ways of communicating your message via microsites and webchats is on the rise



France

France's diverse, expert and far-reaching national media has consolidated as it has moved online, with many of the widest-read publications now operating with a much-reduced editorial staff and covering technology as a sector less overall, with more focus on innovation and French start-ups. Regional media, which carries much business news, has not succumbed in the same way, and remain strong outlets for relevant news.

Despite the French government's subsidies to newspapers, the country's press still has big challenges generating new revenue streams. Slower to shift to digital formats than in many other countries, the leading French newspapers nevertheless have wealthy owners with large corporate interests, which some critics believe could affect editorial output. For example, the heads of two phone operating companies have big stakes in two of the national dailies.

However, while B2B technology media have faced many of the pressures of their counterparts in other markets, some specialised publications have managed to buck the industry's downward trend, for example lifestyle and culture magazines that have developed digital editions.

Primary Business Media

While influential, France's main national newspapers and business media of Le Figaro, Le Monde, Les Echos, Le Parisien and La Tribune have comparatively low readerships. All carry technology stories, but are only interested in companies that sell products and services that which benefit the French economy, or create jobs. Meanwhile the mainstream TV networks like TF1, France 2 and BFM do carry business stories but only about the very largest of tech brands.

While each media outlet varies widely, customer stories and interviews, executive profiles of companies investing in France and issues-driven stories about tech changes that will impact the local economy tend to play well, whereas other content tends to fall flat.



Trade/Technology Media

In common with many markets, the number of publications that will accept product-focussed stories is much reduced compared to the past, but at the same time the need for content to have a clear perspective on how the technological innovation will benefit French industry sectors and the economy at large has increased. While it's true that any technology story must be relevant to the media's readership, in France this is particularly important, with thought leadership content about business transformation and modernisation typically being preferred by editors for longer articles – though again, it must be relevant to French business success and job creation.

Story-wise, the rise of French 'deep tech' start-ups in areas like AI, big data and analytics has driven more interest in technical topics from French tech journalists, and squeezed space available for companies based elsewhere. It does mean that the tech media has been supported in part by this growth though, so the B2B tech publications are in a stronger state than in some other European markets. The primary magazines include FrenchWeb.fr, Journal du Net, 01 Informatique, Silicon.fr Le Monde Informatique.

Hybrid/Lifestyle Media

France has long had a vibrant consumer magazine sector, and it has adjusted reasonably well to the shift to digital formats. Alongside that though, new hybrid magazines have sprung up that cover technology from more of a consumer or lifestyle perspective. And international media brands that fit into this category, such as Mashable, Business Insider and Fast Company, have also developed a strong readership in France, even if some of that content is in English.

Main Drivers & Changes

Above all, French media has adapted at varying paces to digitisation, depending on the sector. Newspapers have been slower but still believe print has a future, and remain influential. Tech media has diversified but remains a strong channel for reaching technology decision-makers. New entrants have created fresh competition and a style of editorial that is gaining ground. But content-wise, relevance to the French market, jobs and the digitisation of French businesses to be more competitive remains the top editorial priority for many journalists.

Key Take-Outs

01

Brand technology stories must show a clear link to the local economy or have an explicit French business angle

02

Specific B2B technology publications are more influential in France than other European countries

03

Hybrid consumer/technology/lifestyle media that focus on the human aspects of technology are emerging





BeNeLux

Overall, the BeNeLux region, while being referred to often as one, has many differences. Media is published in four languages - Dutch, Flemish, Belgian French and even some in German. The readership of each publication is much smaller than most other regions.

Since the rise of the internet and the abundance of free content online, we've seen a trend in recent years that there are far fewer magazines. Also, there is less editorial space. In addition, editorial teams are thinning out, and more and more magazines make use of freelancers. Another result of this trend is that editorial staff increasingly make commercial decisions, especially when it comes to online publications. It poses both a threat and an opportunity as more and more (not newsworthy) content needs to be paid for. The opportunity is that if brands develop partnerships with certain titles, they can leverage more unpaid content with them throughout the year.

More and more publications are refusing to run any editorial content from companies that are not paying for advertising. This is especially true for trade publications and print media. What does still work as pure-earned content? News. So it's important to always look for - or create - a news angle - research findings, executive interviews, and so on. Although these days it's harder and harder to land tech/lifestyle content without news, it should obviously at least match the magazine's formula to increase the chance of publication. Partnerships are common with more titles and branded content is widespread and well read, so long as it's written in the tone of voice of the outlet.



Primary Business Media

The group of most-respected Dutch business media is very small, being mostly confined to the business-focused daily newspapers (Financieel Dagblad, NRC Handelsblad), a small number of bi-weeklies and monthlies such as Management Team, HP de Tijd and Elsevier, and the BNR (Business News Radio) radio channel. Technology is frequently covered in these media outlets, but is mostly focused either on the impact on the Dutch economy or Dutch people. There have been attempts to create specially focused business publications with a tech slant, but they have not been successful, such as NRC Next.

The BeNeLux mainstream media, especially broadcast, prides itself on its independence and investigative rigour, and there are a number of news/talk shows that dive quite deeply into controversial issues, such as Tegenlicht, Zembla, Pauw, Jinek and De Wereld Draait Door. While

these shows do generally follow journalistic ethical codes, there have been instances when negative stories have been run with no opportunity to tell a company's side of the story.

The most positive opportunities with mainstream and business media are to be able to identify and provide a unique, interesting angle on current trends. Positioning executives as thought leaders in relevant industry trends can be successful in hijacking a news cycle.

As a side note: most senior business people in the BeNeLux region read business media in English, French, and/or German on a daily or weekly basis. Titles such as the Financial Times, Die Welt, Le Monde, the Wall Street Journal Europe, The Economist and Forbes are well respected and read in the region, as well as local language publications.

Trade/Technology Media

There is a narrowing band of pure-play tech and trade titles in BeNeLux. With some exceptions such as Bright, the publications almost always have a niche focus, either by job title (CIO) or sub-segment (such as Emerce, for e-commerce). As the number of publications have decreased, the importance of both online social channels, such as blogs on Medium or LinkedIn, as well as international titles, such as Wired or TechCrunch, have increased. As mentioned above, it is extremely difficult to get editorial coverage in the tech media without 'hard news', unless it is accompanied by a paid relationship of some sort.

An important trend to be aware of is the increased focus on the tech scene in the local markets. It is basically impossible to get coverage for an international company without a local angle, such as a Dutch or Belgian customer.

Other Media

Relative to other markets, there are very few gadget-focused publications, but there are quite a few online sites such as Tweakers.net (the biggest tech platform in the Netherlands), DutchCowboys, Bright, Hardware.Info. Lifestyle media, including women's, men's, travel, home, or fashion, almost never cover technology, except references to topic-appropriate websites, gadgets, or podcasts.

Main Drivers & Changes

The rise in free content online and slimmed down editorial teams means brands need to work hard to earn the right to editorial coverage in this market. More likely, brand owners must be prepared to enter into a partnership with their preferred media titles especially as there's a decline, not increase in the number of specialist technology media.

Key Take-Outs

01

The relationship between editorial and paid-for is increasingly blurred in this market. With editorial teams often on the front line of this decision-making

02

Co-creation of content and brand/publication partnerships are on the rise and will help maximise visibility to key audiences

03

Local customer stories are imperative to secure coverage for international companies in this market





Italy

The Italian media landscape is distinguished by two main features. Firstly, print and television media have always overlapped with politics. Even today, despite the commercialisation process that took place in the 1980s, the level of political parallelism in the Italian media is notably high.

Secondly, the Italian system is dominated by television. Due to the print press's elitist nature, audiences tend to turn to television for mainstream reporting, so much so that people spend a large amount of time watching television while press circulation remains low. Mass circulation has never been a feature of the Italian print press; instead, it appeals to an elite readership that is already familiar with politics and public affairs.

New media titles are also affected by TV's large consumption, though things are rapidly changing and digital media is gaining traction. Although it is still much less developed than in other countries, with online advertising expenditure still suffering as a result.

The increased commercialisation of the entire mass media over last three decades has partially changed these aspects of the Italian media landscape. Nevertheless, the legacy of this past, and the established relationship between news media and politics, still survives – as the entry of mass media tycoon Silvio Berlusconi into politics demonstrates.

The role of the state in shaping the face of Italy's media has always been important, even if it has diminished over the years. The state plays a role as owner, regulator, and funder.

Primary Business Media

The Italian print newspaper market can be divided into four main segments: paid-for national dailies; paid-for local and regional dailies; free dailies distributed in some cities; magazines. Among the most important national paid-for newspapers are *Corriere della Sera*, *La Repubblica*, *Il Sole 24 ore* and *La Stampa*. In the last five years, combined sales of the main dailies have slightly decreased. Legacy news organisations still dominate usage online. Indeed, the websites with the widest reach are those of the main Italian newspapers *La Repubblica.it*, *Il Corriere.it*, *Il Fatto Quotidiano.it*, *La Stampa.it* and *Il Sole 24 Ore.it*, the main private TV operators (the Mediaset's *TgCom24.it* and *SkyTg24*), and the main news agency (ANSA).

Il Corriere della Sera and *La Repubblica* have always competed for the top spot, outpacing competitors in terms of paid-for circulation. While *Il Corriere della Sera* still is a broadsheet, *La Repubblica* has moved to the so-called Berliner format, a larger-than-usual tabloid. They both also publish their own weekly magazines focused on business, the economy and finance (*L'Economia* and *Affari&Finanza* respectively).

Outlets covering business in Italy are suffering from a reduction in readership and advertising: several publications have closed during the last few years and most are reducing their editorial staff. In terms of online news, most business models are based on advertising although there have been some experiments with paid content. In January 2016, *Il Corriere della Sera* adopted a metered paywall for its online news. Other newspapers, such as *La Stampa* and the business news outlet *Il Sole 24 Ore*, have also introduced forms of premium content for specialised news and databases.

Technology journalists are often freelance editors. As such, they write about several topics including IT, sometime without the skills or knowledge needed to do it properly. Besides, technology has never been extensively covered by the media in general, probably due to a lack of actual understanding of its importance for the economic development of the country.

There are some opportunities to profile executives in broadcast and print media. This often means jumping on a current trend, or being able to talk about a business in detail.

Trade/Technology Media

The number of Italian specialised outlets is constantly reducing, with very few titles opening, many others closing and several slimming their editorial teams.

The most important IT outlets are now *Wired*, *Nova24* and *PC Professionale*. The overall IT media landscape has changed massively, and though several media are still operating in the channel, trade and B2B sectors, many of them offer a 'content development' approach aimed at driving paid media other than conventional advertising - advertorials, special projects, events sponsorships, etc.

Stories are now more feature-led and getting journalists out of the office is now far more difficult. Having strong customers can often help the process with media, such as *PC Professionale*, *Silicon* and *Datamanager*.

Bylined articles are also on the decline, with only a few publications now accepting them as more journalists are writing longer features themselves. The main tech publications still offering bylined articles include *Digitalic*, *Techfromthenet* and *01net.it*, though they are showing less and less interest.

Hybrid/Lifestyle Media

Technology has never been extensively covered by lifestyle media, whose main focus is still on new products. A few lifestyle publications started offering a blend of tech-focused innovation coverage to give broader, deeper perspectives, but it does not happen frequently. The 'smart home' topic is gaining traction as a future-gazing feature and articles often cover specific products, such as the connected fridge. Among publications covering technology, Donna Moderna, Vogue, Cosmopolitan; Wired and Focus try to combine science with technology to different perspectives.

Main Drivers & Changes

Editorial coverage has become more difficult to achieve than ever before. Paid-for opportunities in the form of sponsored articles or wider commercial opportunities have been gaining in popularity and can help maintain brand presence.

Many publications are now online only, shaping the nature of the editorial content that will work. All rely to a degree on brands for that content though. Video has also become a popular platform for corporate storytelling. Corriere della Sera, one of the most important Italian dailies, has created a dedicated section on its website for 360° video, in order to enable easier sharing through channels while attracting new readers.

Key Take-Outs

01

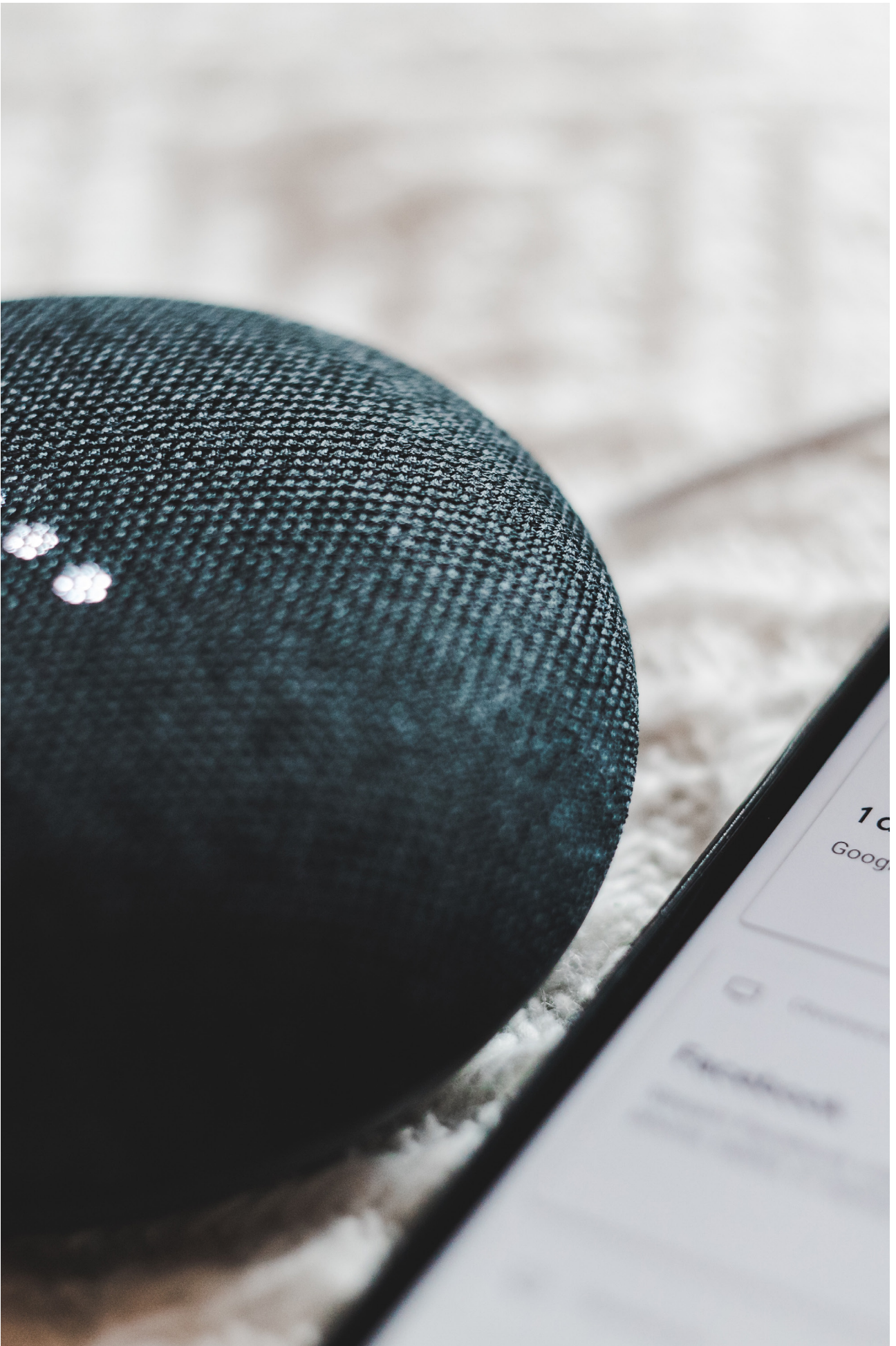
The Italian political landscape provides a backdrop to most media coverage, including technology stories

02

Technology journalists are often freelance editors who lack an understanding around the importance of technology within the broader economic fabric of Italy

03

As with other markets increasingly paid-for opportunities are the route to maintaining brand presence



Spain



In Spain, technology trends now not only attract the attention of tech media, but also general, radio and broadcast media. Gaining editorial in this type of media requires strong, relevant content and high-level spokespeople. When talking about topics, consumer trends with a massive impact are the most desirable – gadgets, innovation, 3D, AI and online security. Trends such as big data, IoT or cloud are still too technical for this media, though interest is growing.

Newspapers have shown more interest in tech news and have dedicated more resources to it. That's why most of them have a special section for news and a tech-focused newsroom – smaller now than in the past though. These media and journalists usually have a greater understanding of tech trends than journalists from radio and broadcast outlets, but they are not as specialised as the tech ones, and have very strict editorial requirements regarding topics and timings.

Trade/Technology Media

Primary Business Media

As well as national newspapers, Spain has strong business and economy-specific media, the leading two for reaching CIOs and decision-makers being Cinco Dias and Expansion. Working with them is not easy: both require technology vendors to demonstrate the clear or potential financial impact of their story topics on Spanish companies and the local economy, while executive interviews need to be exclusive and high-level. National newspapers such as ABC, El Pais and El Mundo now write far less about conventional IT but want content on the consumer impact of technology and a strong local Spanish news hook around current affairs, the news agenda or consumer trends.

When working to profile executives, newspapers are typically the most receptive. Broadcast media are very difficult to reach and hard to secure unless there's a major announcement/profile that works as a hook.

Business media have tech, telco and enterprise-focused journalists, but their newsrooms are very reduced and they have strong requirements regarding topics and spokespeople profiles. While general media prefer B2C content, business media work with both B2C and B2B, but have a stronger interest in the second. They are used to working with exclusives about earnings or major announcements, and are usually interested in publishing interviews and bylined articles, but only from high-level spokespeople.

Spain's tech media is extensive for the size of the market, but like the rest of Europe has been affected by reduced readership and revenue pressures. Many publications still hold significant influence over technology purchasing decisions though, and have begun to change the focus of their content from operational IT requirements to strategic business change and how technology can deliver disruptive advantage.

In part, this is in line with a more positive outlook for the local economy, which had suffered for many years in the early 2010s but is now rebounding. The majority of publications are still prepared to run news and thought leadership content without paid promotion, though brand partnerships are growing. The media landscape divides into professional/IT media, much more technical and B2B focused, and tech/consumer media.

All Spanish media have a good understanding of technology, and are interested in gadgets, innovation, and the social and financial impact of technology. These journalists have built a strong relationship with the leading brands and consider it very important to have that direct contact through a local team. This is not because of the language - tech journalists usually have a good level of English - but because they consider that a local team means that there's a stronger support for the country.

B2B content that works well includes case studies, bylined articles and profiling interviews, though some now require paid promotion. Examples of the most-read tech media are Computer World, Computing, Silicon, Channel Partner, Byte, Xataka and Hipertextual.

Hybrid/Lifestyle Media

Lifestyle media are not really interested in tech announcements or trends, but are in gadgets and devices. In Spain, technology products tend to achieve good placements in gift guides and campaigns such as Christmas and Mother's Day. These titles are used to working with branded content, but it's not a must. Instead of that, many of them will require to keep the product. Example titles include Woman, Elle, Gentleman and Esquire.

Main Drivers & Changes

The Spanish media landscape has evolved in recent years, shaped in part by the local economic crisis. On the one side, newsrooms are now smaller and journalists have more difficulty in attending events and shows. On the other, they have become more demanding regarding content and paid-opportunities. This is especially important when dealing with some IT media, which would only place bylined articles if funded. Financial and general media can also be interested in paid opportunities, as non-paid are usually only for the very largest companies.

For some campaigns, branded partnerships have proved to be very profitable, especially with general and lifestyle media. While this can also be conducted with influencers, most Spanish journalists say they don't like them and wouldn't feel comfortable working together.

Key Take-Outs

01

A highly receptive market for technology stories but to generate quality coverage requires strong, relevant content and high-level spokespeople

02

Spain is one of the few European markets where the majority of technology publications are still prepared to run news and thought leadership content without paid promotion support

03

Most national newspapers have a dedicated tech section



Poland

Like many European countries, the Polish media landscape has seen much change brought about by the rise of the internet and changing readership habits. Circulations of traditional media and their level of business and technology coverage is down. Meanwhile, specialist news forums, blogs and portals are growing in popularity.

The number of early adopters in Poland, both by business and consumers, is relatively high compared to other European countries, making topics such as new software or smartphone releases very important for media. At the same time Polish consumers are more likely to test products from different brands – the highly competitive browser market is a good example – which result in media stories from a broad spectrum of tech brands.

Primary Business Media

The business media in Poland is mainly represented by national newspapers, web portals, blogs, videoblogs, management and weekly magazines, TV, and, to a lesser extent, radio. The national newspaper sector has suffered circulation falls and business sections are getting limited. At the same time, the popularity of web portals and business blogs is growing, attracting more and more advertisers and PR effort.

The tech and internet industry at large has created a greater share of coverage in recent years, as well as a more personal focus on how tech is impacting people's lives. Thought-leadership stories referring to innovations and future solutions for business growth are likely to be covered. Other angles that are relevant to consumers and the general public are Polish success stories, global brands investing in Poland, shopping guides, product tests and benchmarks.

As in the UK, there are now more opportunities for profiling executives in broadcast media, such as TVN24 BiS or Polsat Biznes.

Trade/Technology Media

The tech magazine sector has suffered severe circulation falls in recent years, with many titles closing. At the same time, technology topics have gone mainstream in lifestyle magazines, with product reviews, benchmarks and tech trend analysis. On top of that, a new tech magazine category has appeared – with a focus exclusively on gadgets.

Hybrid/Lifestyle Media

Two web portals that started as tech blogs – Spider’s Web and Antyweb – have turned into the most trusted and popular sources of tech news and opinions in Poland. Spider’s Web has recently reached more than four million unique monthly users. There are several reasons for this success: a modern layout, strong opinions coming from leading tech editors and freelancers, and going beyond technology. Both Portals also have a strong focus on entertainment, movies and motoring. Their main competitors, in terms of readability, are software portals, such as Dobre Programy, that offer app download options as well as tech stories.

To secure coverage in this new tech media landscape, it is important to go beyond the traditional PR model based on press releases. A greater variety of content, such as exclusive stories, lifestyle and social angles, video, or infographics and other well-designed pitching materials are required for success. For global tech brands it has become important to localise PR and marketing materials, as Polish consumers are sensitive to being treated equally by big firms. Having an exclusive service for Polish consumers, such as local series by Netflix, secures extra coverage not only in tech media, but also in traditional press.

Also, Twitter has recently become an important source of information for journalists, evolving into a very strong communication tool.



| Main Drivers & Changes

After the strong fragmentation and diversification phase, the Polish tech media landscape is now more consolidated, and dominated by big players, such as IDG, Antyweb, Spider's Web and Dobre Programy (acquired by Wirtualna Polska, the leading news portal in Poland). With the growing popularity of hybrid/lifestyle media, the range of editorial coverage has increased. These new media are looking for commercial opportunities and a sponsored article collaboration model, but at the same time are very keen on receiving high quality PR content they can share with their readers.

Apart from top-notch and customised content, good relations with top writers are crucial. The simplest way to establish them is to meet writers personally. Inviting journalists for a trip to the company's headquarters, or meeting them face-to-face, is usually helpful.

Also, sharing products with media for testing prior to the release, under embargo, has become a very effective way of securing coverage. It usually results in in-depth articles with images or video product reviews prepared by journalists themselves.

Video has become a very important story platform. Trends have been set by YouTube unboxing channels, and now also tech media video channels are getting more informal and entertaining. This informal video style is now also copied by tech brands and tends to be more efficient as a PR channel.

| Key Take-Outs

01

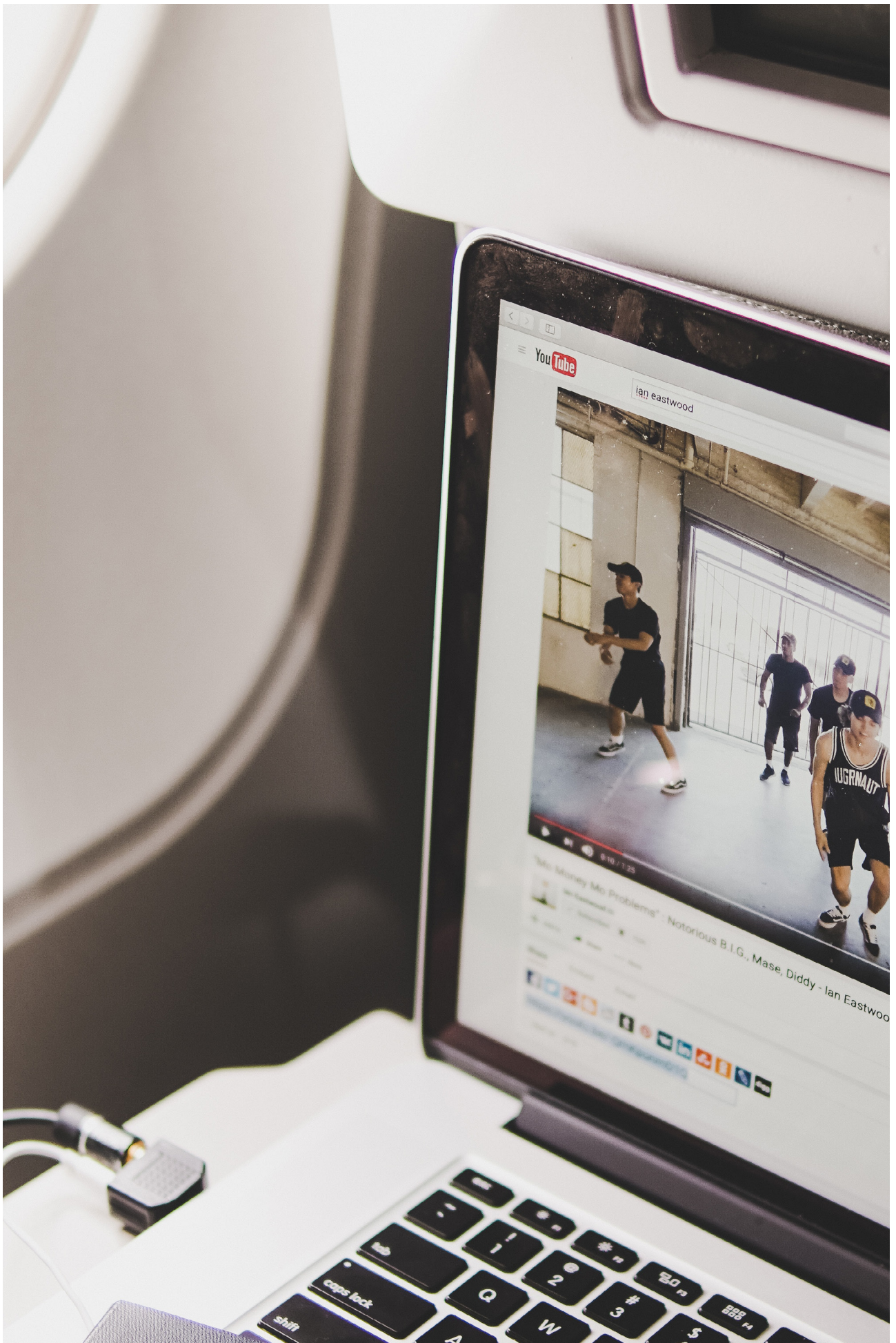
New emerging lifestyle media opportunities means good editorial opportunities for brands to maximise

02

Building personal relationships with the media in this market is more important than in other European countries

03

Product testing and subsequent reviews of new technology tends to result in good quality in depth articles



04 Summary

A one-size-fits-all approach has never been a recipe for earned media success for tech brands in Europe. That has never been more true than it is today, and communicators need to work harder than in the past in order to see their stories cut through, and achieve meaningful value by doing so. Equally, the approach each brand needs to take will vary, perhaps more than ever. But shifts in the media landscape and how technology is used to supply content mean that several points are now more important in effective communications across markets in the region.

Understand that each market is different

This has always been the case – each market comes with its own conventions, customs and nuances. But the differences in media across markets have become more profound, meaning that developing centralised content which requires translation and minimal modification to work locally is more difficult than it was in the past. More legwork may be needed, but equally some content is far less effective, so spend more time on the former and a lot less on the latter.

Plan media at national level, consider planning content at a publication level

We can't spend too much time planning, but gaining strong, clear media insights is crucial, as is continuing to track media evolution over time to keep content relevant. A regional strategy can still be effective, but earned media planning needs to be concentrated at a national level and content may need to be planned publication-by-publication.

Use data analysis where feasible to better understand audiences and where value lies

Audience consumption of media – people reading and engaging with news and features – is now more trackable than ever. Tools and techniques can better understand how audiences are reacting to content, which types of stories and content drive the most engagement, how editorial agendas are evolving and even predict which approaches to creative content will drive the most effective commercial impact.

Integrate paid amplification for appropriate story content and media partnerships where possible

In the fierce competition for eyeballs and engagement, paid support may be beneficial for major stories or to amplify how that content is seen on social networks. Paid can accelerate engagement, but its use must be agile and can perform best when earned stories are at the heart of the communications plan. Integration takes joined-up planning, but can drive stronger net results.

Be creative and co-creative, flexible yet focused in storytelling

The more brands understand their audiences and media channels through effective insights, the more license they have to be creative in their communications. In the fast-moving, complex world of technology, creativity can often best be applied by engaging in something with the media, or with a commercial ally, so content is co-created and the purpose of the creativity extends further. But as media continues to evolve and fragment, an agile approach to content creation, the ability to change tack mid-plan and the necessity of remaining focused on what the brand really wants to communicate remain fundamental.

05 Want More?

This is intended to be an outline overview of the technology media in Europe and how it's evolving. The pace of change is such that invariably some of the issues it covers will develop further in the near future. Equally, brands wanting to plan how to best drive editorial value in European markets will need to look much closer at how to do that more effectively.

For more insights on European media, whichever the markets, please get in contact with us.

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