# Cross media publishing and content management systems: results of an empirical analysis at special interest publishers

Prof. Dr. Svenja Hagenhoff
Institute for the Study of the Book
E-Publishing and Digital Markets Group

International Media Management Academic Association
Conference May 3-4, 2013, Lisboa, Portugal

**FAU**
FRIEDRICH-ALEXANDER
UNIVERSITÄT
ERLANGEN-NÜRNBERG

PHILOSOPHISCHE FAKULTÄT
UND FACHBEREICH THEOLOGIE

# Outline

- **Motivation and problem definition**

- Objects of investigation

- Approach

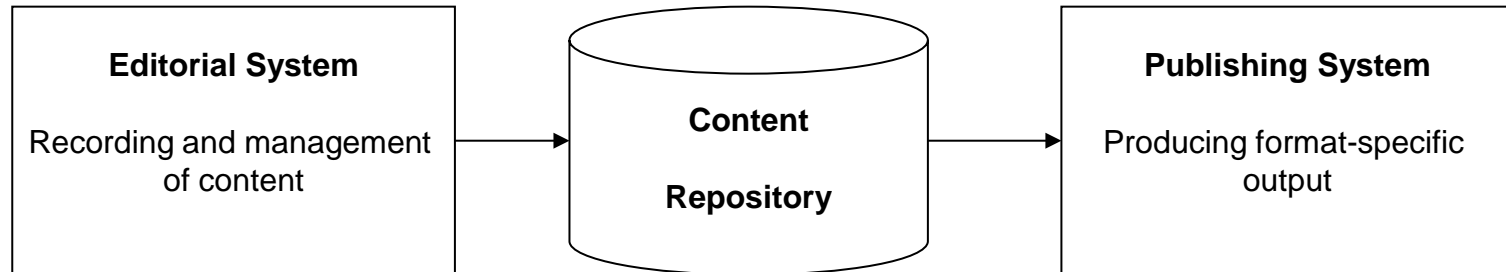- Results

- Interpretation

- Outlook
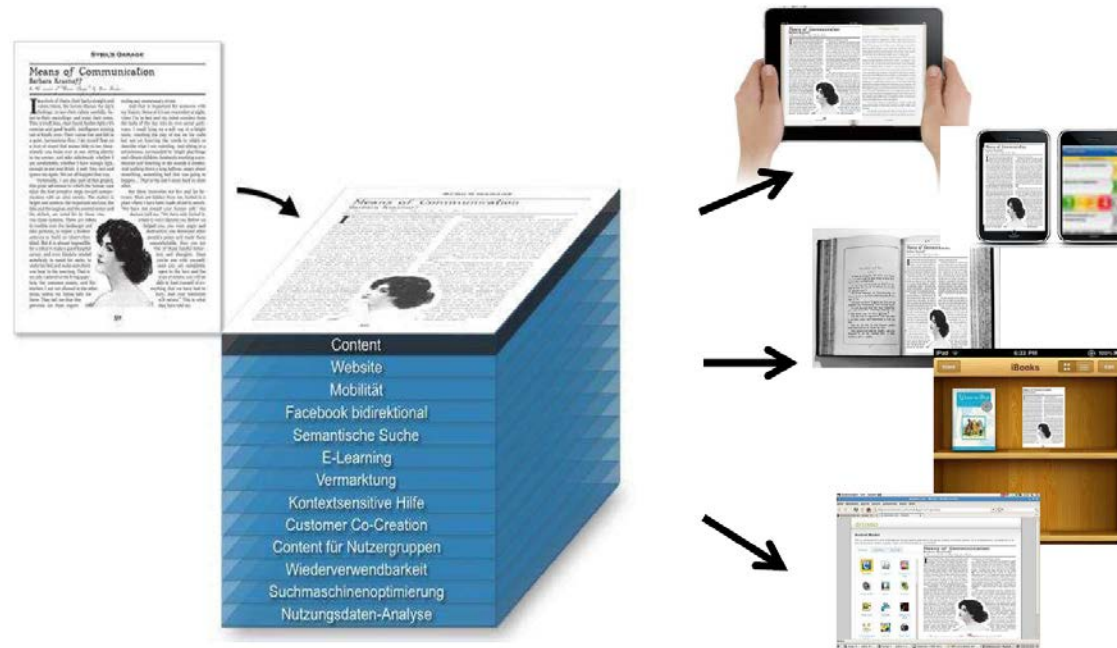
- People want to use their different devices to read written content

- Great challenge: efficiency of production processes => single source, multiple media

- The processes need to be supported by IT: content management systems

*Example from: Henzler, H.: Geschäftsmodelle für eBooks, Apps & Co. Presentation on IBG-Jahrestagung, München, 9.11.2012.*

# Outline

# Publishing houses and special interest publishers

- Publishing house: media company that produces periodically or aperiodically media that contain mainly characters or figures (text, picture; static)

- Special interest publishers:

    - Offer media for people  who need content in a professional ore semi-professional way

    - Target groups within the investigation *(Verband der Deutschen Fachpresse 2013)*
        - Professional decision makers (B2B business),
        - Interested laypersons (B2C business)
        - Science (S2S business)

*Deutsche Fachpresse: Was Fachmedien leisten. http://www.deutsche-fachpresse.de/was-fachmedien-leisten/, retrieval 12/02/2013*

# Cross media publishing



- Traditionally the process of producing a media good is attuned to the carrier medium (web, paper)


- Cross-media publishing (Rawolle 2002)

    - Media neutral production process
    - Parallel provision of content in different formats

Sjurts, I.: Gabler Lexikon Medienwirtschaft, 2. Auflage. Gabler Verlag, Wiesbaden (2011)
Rawolle, J.: XML als Basistechnologie für das Content Management integrierter Medien-produkte. Springer, Wiesbaden (2002)

# Content management systems (CMS)

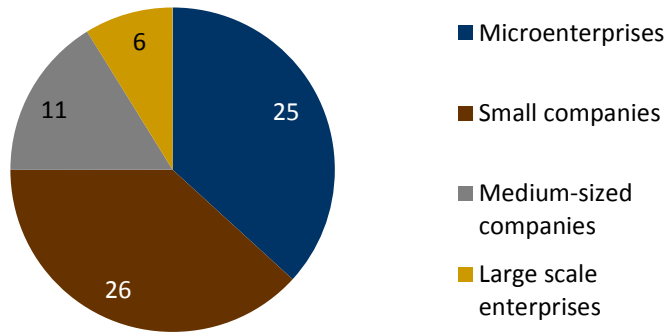| Editorial System<br><br>Recording and management of content | → | Content<br><br>Repository | → | Publishing System<br><br>Producing format-specific output |
|---|---|---|---|---|

*Rawolle 2002, p.39*

- Elementary characteristic: separation of content, form and structure

- Single source, multiple media

- Historical origins in publishing houses: editorial systems (but: layout-oriented working)

Rawolle, J.: XML als Basistechnologie für das Content Management integrierter Medien-produkte. Springer, Wiesbaden (2002)
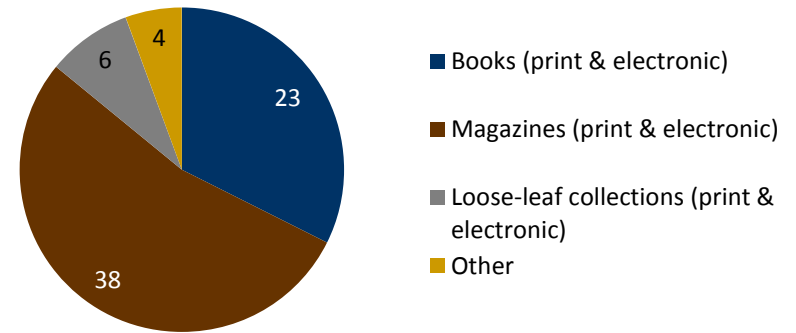
# Outline

- Objective:

  - Regarding content: What is the current state of cross-media publishing at special interest publishing houses?

    - Which products do special interest publishers offer?

    - Are special interest publishers doing cross media publishing? If so: how?

    - What do special interest publishers think of cross media publishing?

    - Are there different maturity levels, depending on the size of the company or the type of publisher?

    - Which are the challenges concerning cross media publishing?

  - Formal: Description of reality


- Period: From spring to autumn 2011


- Methodology:

  - Qualitative empirical research: interviews with 13 experts from 12 publishing houses

  - Quantitative empirical research: large written survey among 441 specialist publishers

  - Response rate: 17 % (73 usable records)


- Funding of the study provided by:  Deutsche Post AG (Business Unit "Vertrieb Presseservices")

# Characteristics of the sample

**Size of the publishing house (revenue)**
**(n = 73, AQ: 8,22 %), absolute values**

- Microenterprises — 25
- Small companies — 26
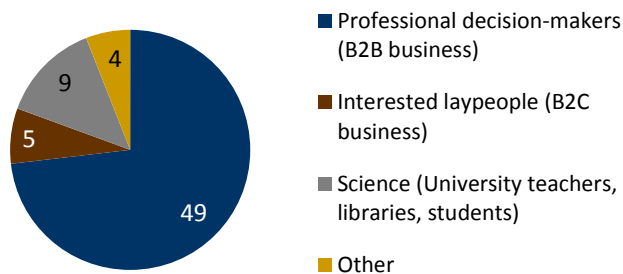- Medium-sized companies — 11
- Large scale enterprises — 6

Microenterprises: ≤ 2 Mio. €, Small companies: ≤ 10 Mio. €,
Medium-sized companies: ≤ 50 Mio. €

**What is your primary source of revenue (product)?**
**(n = 73, AQ: 26,03 %), absolute values**

- Books (print & electronic) — 23
- Magazines (print & electronic) — 38
- Loose-leaf collections (print & electronic) — 6
- Other — 4

**With which target group do you gain the largest share of revenues?**
**(n = 73, AQ: 8,22 %), absolute values**

- Professional decision-makers (B2B business) — 49
- Interested laypeople (B2C business) — 5
- Science (University teachers, libraries, students) — 9
- Other — 4

**What is your primary source of revenue (market)?**
**(n = 73, AQ: 27,40 %), absolute values**
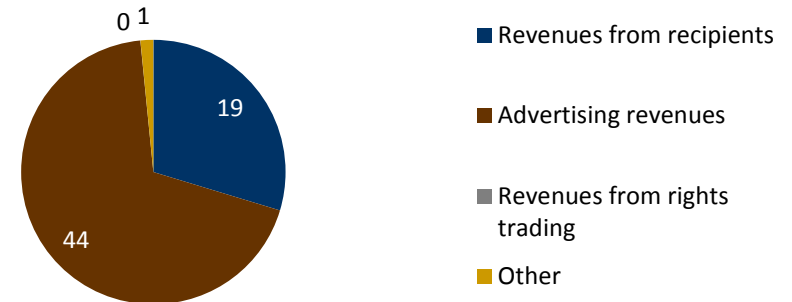
- Revenues from recipients — 19
- Advertising revenues — 44
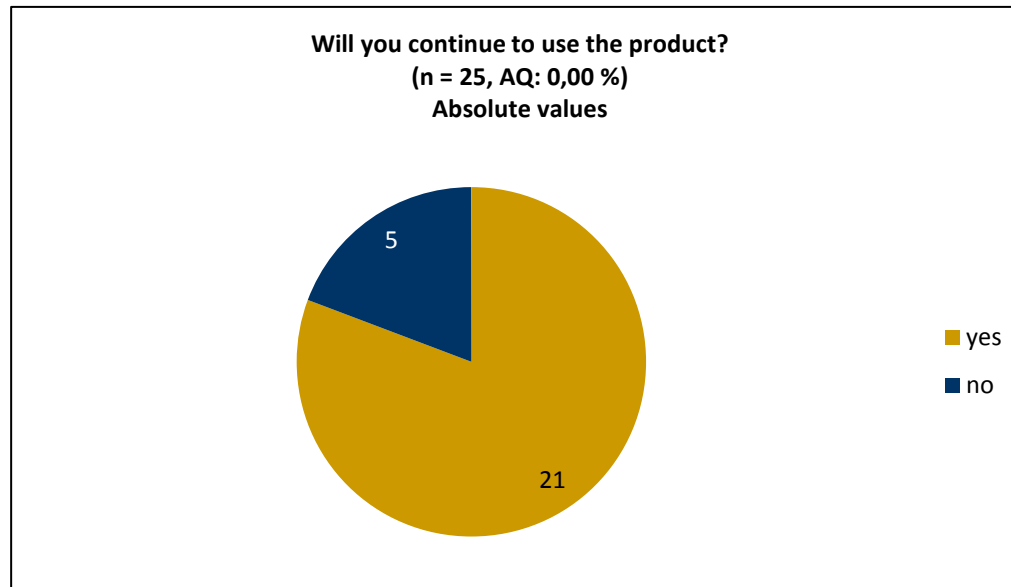- Revenues from rights trading — 0
- Other — 1

# Outline

- Motivation and problem definition

- Objects of investigation

- Approach

- Results

- Interpretation

- Outlook

**Which products does your publishing house produce?**
**(n=73; failure rate 0,00 %)**
**red: print, blue: electronic**



| Product | Number of mentions |
|---|---|
| Magazines | 69 |
| Books | 56 |
| Stationary websites | 50 |
| Newsletters | 50 |
| Online databases | 32 |
| CD-ROMs | 28 |
| eBooks | 26 |
| Newsletters | 25 |
| eJournals | 25 |
| Native apps | 21 |
| Loose-leaf collections | 18 |
| Sites for mobile internet | 17 |
| Databases on CD-ROM | 17 |
| Software | 10 |
| Calendars | 9 |
| Newspapers | 8 |
| Other | 6 |
| eNewspapers | 5 |
| Other electronic | 4 |

# Are CMS used?

**Does your publishing house use a content management system?**
**(n = 73, AQ: 0,00 %)**
**Absolute values**

25

48

■ yes
■ no

**Will you continue to use the product?**
**(n = 25, AQ: 0,00 %)**
**Absolute values**

5

21

■ yes
■ no

# Deeper look: CMS yes or no

**Percentage of companies with or without a system, separated according to the company size (revenue)**



Legend:
- Companies with system
- Companies without system

X-axis categories: Microenterprises, Small enterprises, Medium-sized…, Large scale companies

**Percentage of companies with or without a system, seperated according to the assessment of the in-house progress of CMP**



Legend:
- Companies with system
- Companies without system

X-axis categories: Issue not relevant, At a very early stage, Started, Advanced, At a very advanced stage
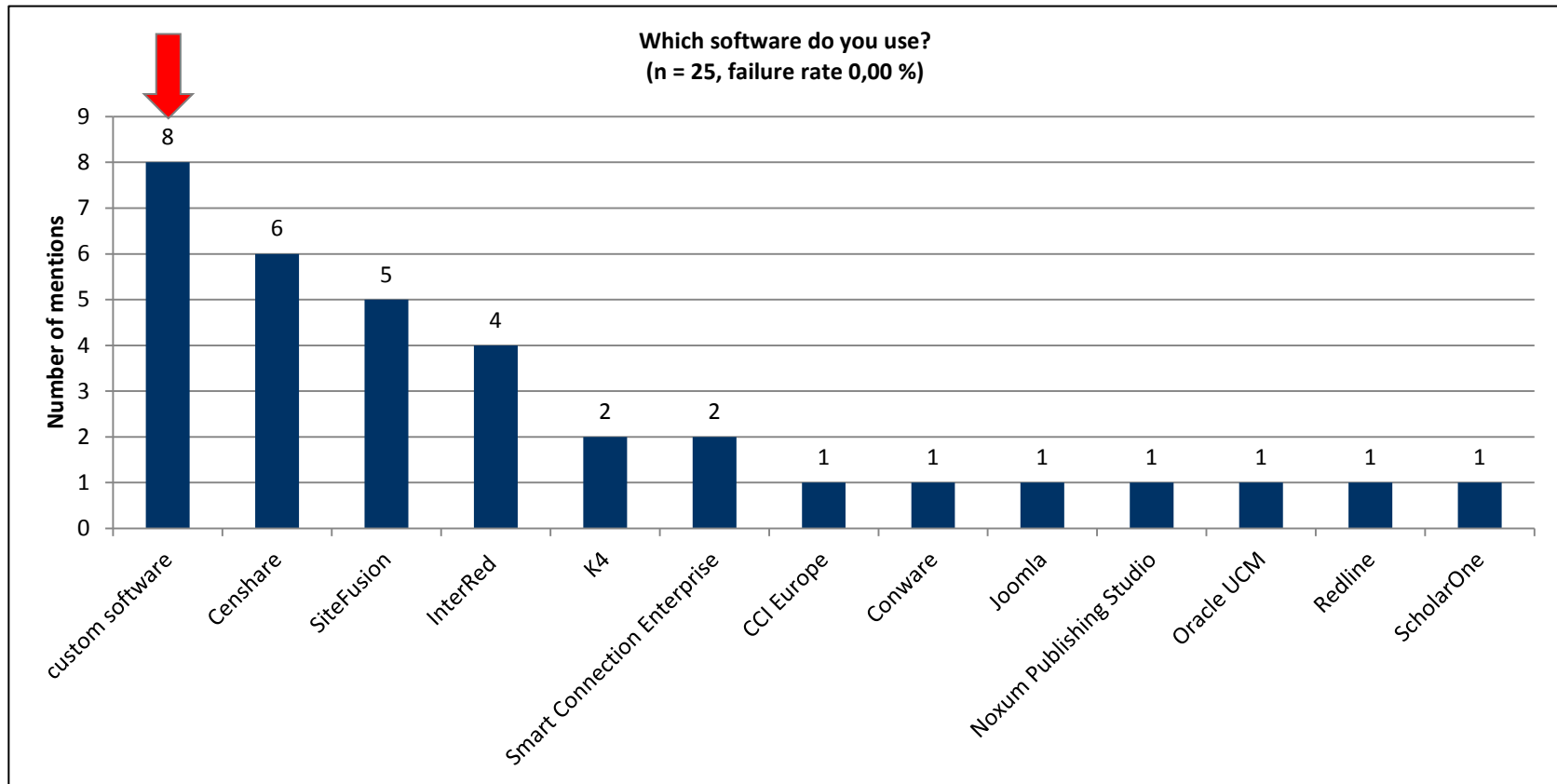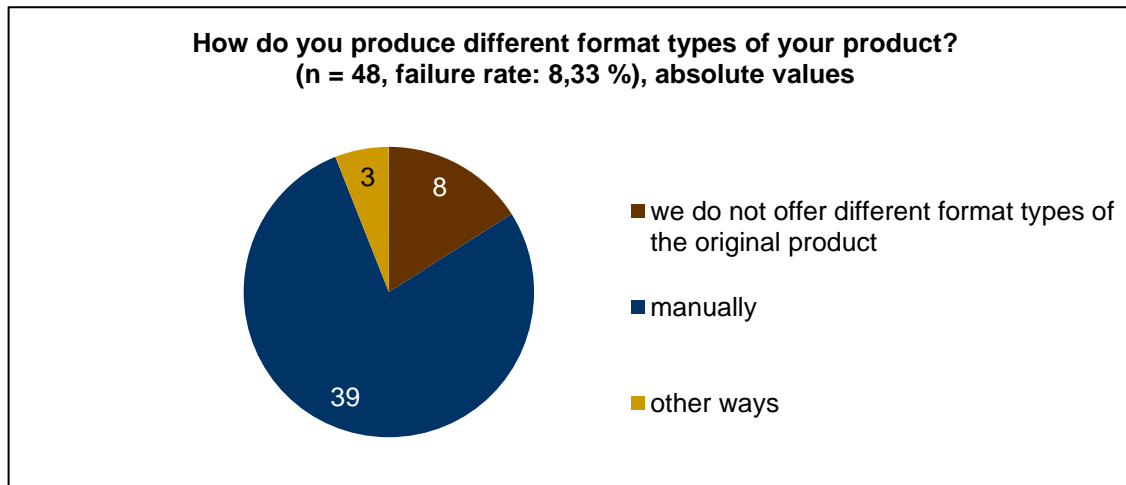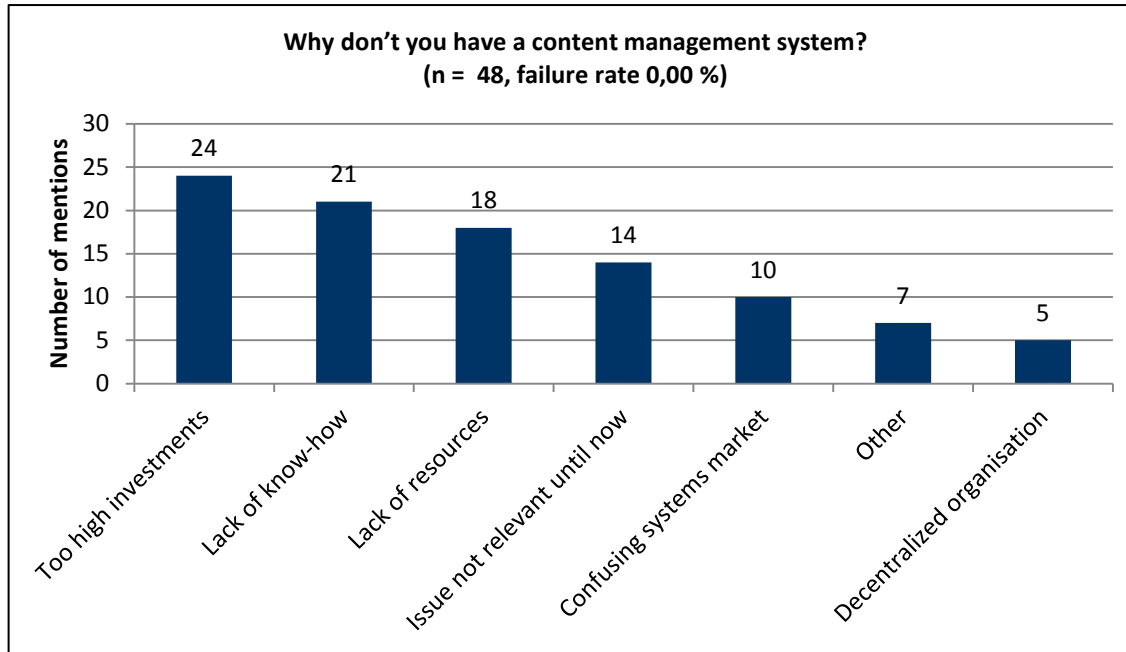
- No differences between publishing companies with regard to the type of revenue elements (advertising revenues, revenues from recipients)

- Huge differences between publishers with regard to the product types (books, magazines, loose-leaf collections)

# CMS yes: Which software?

**Which software do you use?**
**(n = 25, failure rate 0,00 %)**

Number of mentions by software:

- custom software: 8
- Censhare: 6
- SiteFusion: 5
- InterRed: 4
- K4: 2
- Smart Connection Enterprise: 2
- CCI Europe: 1
- Conware: 1
- Joomla: 1
- Noxum Publishing Studio: 1
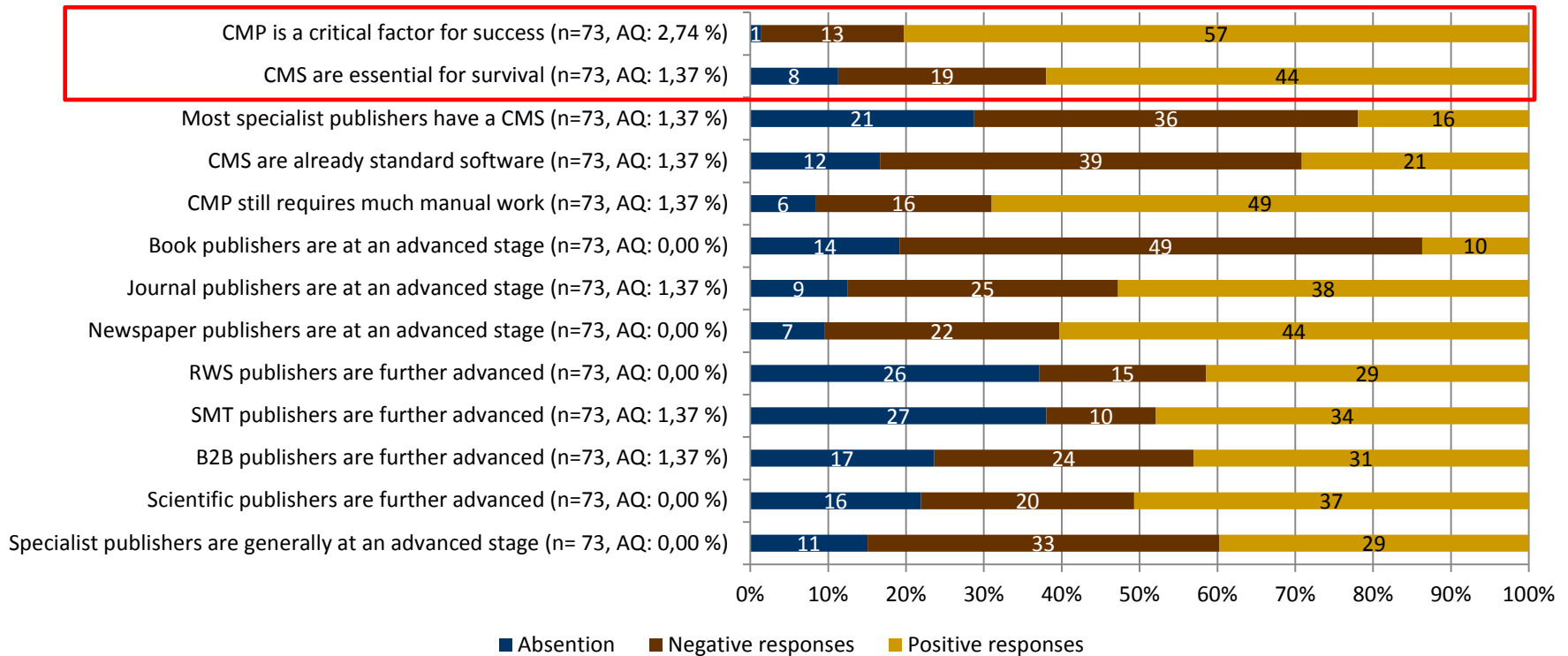- Oracle UCM: 1
- Redline: 1
- ScholarOne: 1
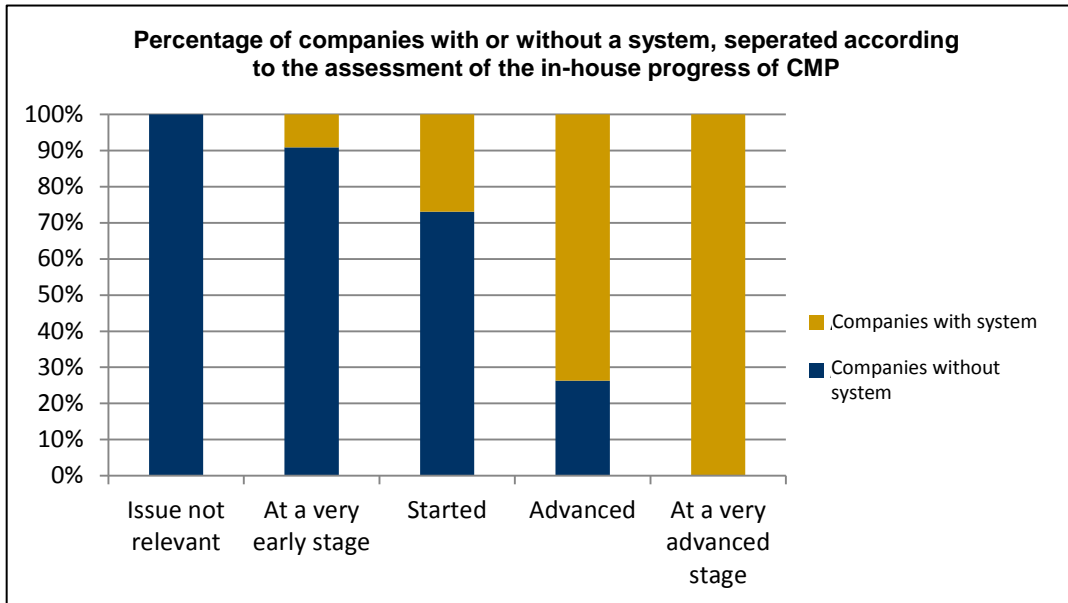
- Functional core of the system not always precisely identifiable as „content management"

- A lot of publishing houses use more than one system

- Date of purchase: majority from 2005 onwards

**Why don't you have a content management system?**
**(n = 48, failure rate 0,00 %)**

Number of mentions:
- Too high investments: 24
- Lack of know-how: 21
- Lack of resources: 18
- Issue not relevant until now: 14
- Confusing systems market: 10
- Other: 7
- Decentralized organisation: 5

**How do you produce different format types of your product?**
**(n = 48, failure rate: 8,33 %), absolute values**

- we do not offer different format types of the original product: 8
- manually: 39
- other ways: 3

# Opinions on cross media publishing



**Agreement to statements (standardized scale; absolute values)**

| Statement | Absention | Negative responses | Positive responses |
|---|---|---|---|
| CMP is a critical factor for success (n=73, AQ: 2,74 %) | 1 | 13 | 57 |
| CMS are essential for survival (n=73, AQ: 1,37 %) | 8 | 19 | 44 |
| Most specialist publishers have a CMS (n=73, AQ: 1,37 %) | 21 | 36 | 16 |
| CMS are already standard software (n=73, AQ: 1,37 %) | 12 | 39 | 21 |
| CMP still requires much manual work (n=73, AQ: 1,37 %) | 6 | 16 | 49 |
| Book publishers are at an advanced stage (n=73, AQ: 0,00 %) | 14 | 49 | 10 |
| Journal publishers are at an advanced stage (n=73, AQ: 1,37 %) | 9 | 25 | 38 |
| Newspaper publishers are at an advanced stage (n=73, AQ: 0,00 %) | 7 | 22 | 44 |
| RWS publishers are further advanced (n=73, AQ: 0,00 %) | 26 | 15 | 29 |
| SMT publishers are further advanced (n=73, AQ: 1,37 %) | 27 | 10 | 34 |
| B2B publishers are further advanced (n=73, AQ: 1,37 %) | 17 | 24 | 31 |
| Scientific publishers are further advanced (n=73, AQ: 0,00 %) | 16 | 20 | 37 |
| Specialist publishers are generally at an advanced stage (n= 73, AQ: 0,00 %) | 11 | 33 | 29 |

■ Absention  ■ Negative responses  ■ Positive responses

# Opinions on cross media publishing

**Agreement with statement: The biggest challenge of cross-media publishing is ...**
**(standardized scale, absolute values)**

| Statement | Abstention | Negative responses | Positive responses |
|---|---|---|---|
| investment requirements (n=73, AQ: 0,00 %) | 4 | 27 | 42 |
| the poor controllability of resulting changes (n=72, AQ: 1,37 %) | 2 | 49 | 21 |
| the poor comprehensibility of the consequences (n=73, AQ: 0,00 %) | 2 | 49 | 21 |
| the nature of the products (n=73, AQ: 0,00 %) | 0 | 34 | 39 |
| the lack of revenue models (n=73, AQ: 0,00 %) | 1 | 24 | 48 |
| legal aspects (n=73, AG: 0,00 %) | 3 | 47 | 23 |
| technical aspects (n=73, AQ: 2,74 %) | 6 | 28 | 37 |
| the thinking in terms of print products (n=72, AQ: 1,37 %) | 1 | 17 | 54 |

■ Abstention  ■ Negative responses  ■ Positive responses

# Outline

- Motivation and problem definition

- Objects of investigation

- Approach

- Results

- Interpretation

- Outlook

**System support and software market**

- Many different software products

- A lot of custom software (in-house developments)

- Partially several systems with a „diffuse" functional core in use in the publishing houses

- => Delimitation of the CMS to surrounding systems might be difficult

- => Immature market with atomistic structures

**Process design**

- Low level of standardization within the sector

- Domination of individual working methods of the companies:
  "Our books are completely different from…"

- Production processes are designed for defined starting products („still thinking in print")

- => not a good basis for providers of standard software

- => not a good basis to achieve efficiency improvements

# Outline

- Motivation and problem definition

- Objects of investigation

- Approach

- Results

- Interpretation

- Outlook

- Concerning what aspects does the branch need standards to achieve cost efficiency?

    - Paper formats ⇔ file format

    - Data exchange format (onix, …)

    - Standards in secondary processes (e.g. invoice raising)

    - Standards in main processes („industrialization")

    - …

- Does the reader need product standards concerning usability of „e-objects"?

- Where is differentiation useful?

# Standards and usability concerning the product

Should it look like print? How to zoom?

Or somehow else?
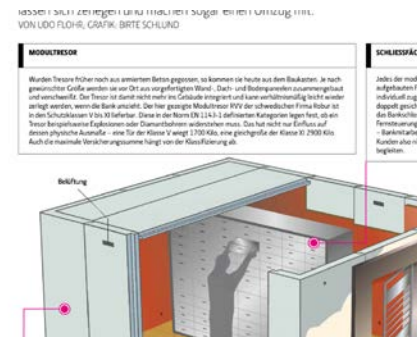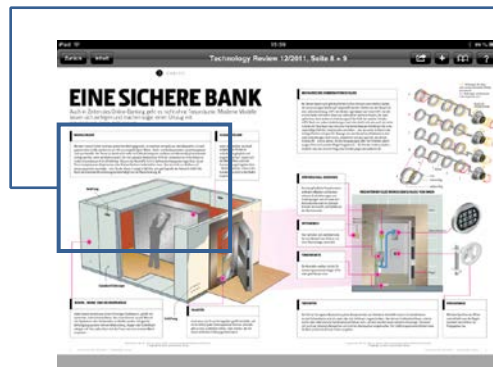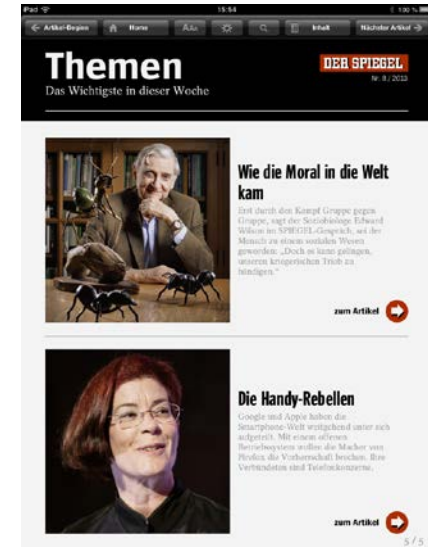
# Standards and usability concerning the product

Example:

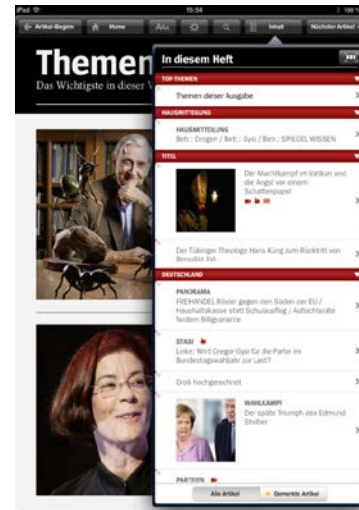How to navigate from article to article? Is the reader able to get along with the different approaches?

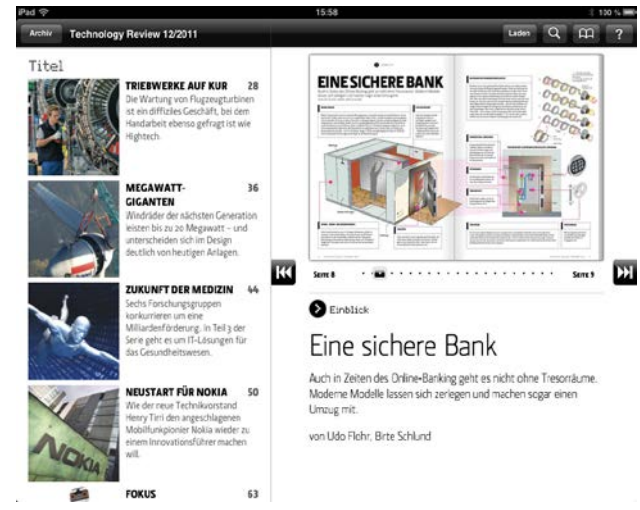Different possibilities to present the table of content



Newspaper „Die Zeit"          Magazine „Brand Eins"          Magazine „Der Spiegel"          Magazine „Technology Review"

# Standards and usability concerning the product

An extreme scenario…



Newspaper „FAZ am Sonntag"



Magazine „Stern"



Magazine „Geo"

# Finis!