

National and Regional Newspapers in Competitive Markets

Piet Bakker

The Netherlands belongs to the cluster of Northern and Central European nations with high levels of newspaper readership. According to figures for 2002, 64 daily newspapers are sold in every 100 households. From 1980 until 1997, approximately 4.5 million newspapers were printed every day. However, since 1997 this figure has declined to 4.2 million in 2002. Also because the amount of households has increased since 1980, the number of papers per 100 household has declined. The Dutch newspaper market is a very concentrated market, with only eight companies publishing daily paid newspapers. Three of them have a combined market share of 90%. The national market is dominated by two publishers, while one other publisher controls 52% of the regional market. In 1999, two free dailies were launched on the Dutch newspaper market and they now have a combined circulation of almost 700,000. Paid non-dailies are not that important in the Netherlands, with 53 titles having a combined circulation of less than 300,000. However, they do reach a relatively high proportion of the population in the regions where they are published. Free weekly papers can be found in every Dutch household and have a combined circulation of more than 19 million. On average, each household receives three free weeklies. In the Netherlands, there are no Sunday papers, no sports papers and no tabloid newspapers (like *The Sun* or *Bild*).

Sources

Data on all daily paid newspapers is gathered and controlled by the Dutch auditing organization HOI (Het Oplage Instituut). The most recent general information is available on their website <http://www.hoi-online.nl> (HOI 2003). The Dutch newspaper marketing organization, Cebuco, publishes detailed information once a year in their *Dagbladen Oplage Specificaties* (Cebuco 2003) and online (<http://www.ceuco.nl>). HOI also gathers information on free daily newspapers and specialized newspapers. Additional information on circulation can be found in the half-yearly handbook *Handboek van de Nederlandse Pers en Publiciteit*

(2003). Information on the majority of paid non-dailies is gathered by the Nederlandse Nieuwsblad Pers (NNP) and is available through their website (<http://www.nnp.nl>). Circulation data for non-NNP members can be found in the *Handboek van de Nederlandse Pers en Publiciteit* (2003). This is also the source for data concerning free weeklies, semi-weeklies and bi-weeklies. A number of recent publications on the Dutch press market have been written by Bakker (2002a) and Bakker and Scholten (2004). More information on press and other media can be found on the website for the Dutch press organization *Bedrijfsfonds voor de Pers* (<http://www.persmediamonitor.nl>).

Newspapers, Types, Titles, Circulation, Publishers in 2002

Newspapers in the Netherlands can be divided into several different categories:

- Paid daily newspapers
 - National (7 titles, circulation 1.9 million)
 - Regional (25 papers¹, circulation 2.3 million)
 - Specialized newspapers (4 titles, circulation 110,000)
- Free dailies (2 titles, circulation 670,000)
- Paid non-daily newspapers (53 titles), circulation 277,000)
- Free non-dailies (556 titles, circulation ±19 million – data for 2001).

Paid newspapers, one free paper (*Metro*) and one of the specialized newspapers are published six times a week, while the other three specialized papers and the other free daily are published five days a week. In the Netherlands, non-daily nearly always means „once a week“. Only 20% of paid non-weeklies are published more than once a week and just three of them are published three times a week. A very small amount of free non-dailies are published more than once or twice a week.

This definition poses a problem from a pan-European perspective. When daily newspapers are defined as being published „at least twice a week“, the last two categories would be split into „newspapers“ and „non-newspapers“ depending on whether or not they are published more than twice a week. This presents problems because these two types are fairly homogeneous when we look at their content: no national or international news, and a purely local orientation. The second – but smaller – problem concerns specialized newspapers. They concentrate on one issue (e.g., finance, government, agriculture, construction) but do carry some general news. So there are in fact problems with two of the criteria in the *European Newspaper Markets* questionnaire. Additionally, there are a number of problems with some of the other categories within the definition, but these have more to do with the availability (or to be more precise, the non-

¹ *World Press Trends 2003* contains some different figures, e. g. only 24 regional papers, because two of them have a combined circulation figure and are counted as one.

availability) of data. These problems will be mentioned in specific sections below.

Paid National and Regional Daily Newspapers

Because the Netherlands is a small and densely populated country there is little perceptible difference between local and regional newspapers. However, there is a clear difference between national and regional papers. National papers are available in almost every Dutch city, although the highest levels of readership are to be found in the western part of the country (Amsterdam, Rotterdam, The Hague, Utrecht and surrounding areas). Subscription is dominant with only 9% of the total circulation consisting of single copy sales. According to 2002 figures, seven different national titles are published (Table 1). Four of them belong to the same publisher (PCM), the other three are independent. The two major players control 95% of the national circulation. Some national dailies have different local editions; *De Telegraaf*, *Algemeen Dagblad* and *de Volkskrant*.

Title (Publisher)	Circulation (in 1,000s)	% of Single Copy
<i>De Telegraaf</i>	767	17
<i>De Volkskrant</i> (PCM Uitgevers)	326	12
<i>Algemeen Dagblad</i> (PCM Uitgevers)	314	14
<i>NRC Handelsblad</i> (PCM Uitgevers)	265	6
<i>Trouw</i> (PCM Uitgevers)	124	7
<i>Reformatorisch Dagblad</i>	59	0
<i>Nederlands Dagblad</i>	33	1
Total	1,889	13

Almost every Dutch regional newspaper is published in different editions. However, not every newspaper publishes the figures of the different editions and sometimes not even the amount of editions. It is therefore difficult to count the number of different „publications“. In Table 2, the amount of editions (104) is therefore an estimation.

In 340 of the 496 Dutch communities (69%), there is only one regional newspaper, 77% of the Dutch population lives in these communities. In Table 3, the total circulation of the Dutch daily paid press is given for the last 20 years. Circulation rose slightly until 1997, after that a decline set in.

Table 2		Publishers, Market Share, Titles, Editions and Domestic Circulation Regional Paid Dailies (2001)
Publisher (Market share) Titles (No. of editions)		Circulation
Wegener (52%)		1,203,566
<i>De Twentsche Courant Tubantia (7)</i>		137,751
<i>Haagsche Courant (4)</i>		107,578
<i>De Gelderlander (14)</i>		190,480
<i>Brabants Dagblad (7)</i>		155,396
<i>Eindhovens Dagblad (3)</i>		121,984
<i>BN De Stem (6)</i>		142,410
<i>Utrechts Nieuwsblad/Dagblad Rivierenland (5)</i>		84,615
<i>IJssel Dagbladen Combinatie (15)</i>		152,917
<i>Amersfoortse Courant/Veluws Dagblad (4)</i>		33,376
<i>PZC (4)</i>		63,038
<i>Goudsche Courant</i>		14,021
Telegraaf (23%)		520,553
<i>Limburgs Dagblad / Dagblad de Limburger (5)</i>		234,830
<i>Haarlems Dagblad Combinatie (5)</i>		52,575
<i>Leidsch Dagblad (3)</i>		39,035
<i>De Gooi & Eemlander/Dagblad van Almere (2)</i>		38,275
<i>Noordhollands Dagblad (8)</i>		155,838
FGD Pers (13%)		293,934
<i>Dagblad van het Noorden (4)</i>		180,220
<i>Leeuwarder Courant (2)</i>		113,714
PCm (11%)		253,311
<i>De Dortenaar</i>		31,932
<i>Rijn en Gouwe (3)</i>		32,209
<i>Rotterdams Dagblad (3)</i>		101,436
<i>Het Parool</i>		87,734
Friesch Dagblad (1%)		21,624
Barneveldse Krant (0.49%)		11,376
Circulation for regional papers		2,304,364

According to figures for 2002, only eight companies publish daily newspapers (see Table 4). The big three control 90% of the market, with the C4 being 97. The much used Herfindahl-Hirschman Index (HHI) is 0.28 for the total market (for the national market the HHI is 0.46; for the regional market 0.34). The concentration rate has risen sharply in the last years. In 1995, the C4 was 88, in 1990 it was 64, and in 1981 only 53.

Table 3 Domestic Circulation of Dutch Dailies and Household Penetration (1980-2002)		
	Joint circulation (in 1,000s)	Papers per 100 households
1980	4,548	105
1985	4,446	84
1990	4,590	79
1995	4,658	75
1996	4,658	74
1997	4,652	73
1998	4,418	68
1999	4,439	67
2000	4,323	65
2001	4,254	64
2002	4,193	64

Table 4 Market Share of Dutch Newspaper Publishers in 2002	
Publisher	Market share (%)
De Telegraaf	30.71
Perscombinatie (PCM)	30.58
Wegener	28.70
Noordelijke Dagblad Combinatie	6.83
Reformatorisch Dagblad	1.42
Nederlands Dagblad	0.80
Friesch Dagblad	0.52
Barneveldse Krant	0.27

Specialized Newspapers

Four specialized papers are published in the Netherlands. Three of these are published five times a week, with only *Het Financieele Dagblad* being published six days a week (see Table 5). This particular newspaper is aimed specifically at the financial world. *De Nederlandse Staatscourant* contains mainly official news from the government while the newspaper *Agrarisch Dagblad* is devoted to agriculture. *Cobouw* contains news on construction and building.

	Publisher	Circulation (in 1,000s)
<i>Het Financieele Dagblad</i>	Het Financieele Dagblad	62
<i>Cobouw</i>	Ten Hagen & Stam (Wolters Kluwer)	19
<i>Agrarisch Dagblad</i>	Elsevier Bedrijfsinformatie	18
<i>Nederlandse Staatscourant</i>	SDU	11
Total		109

Free Dailies

Free dailies, a phenomenon which started in Sweden in 1995 (Bakker 2002b), have been around in the Netherlands since the summer of 1999. Metro International, the „inventor“ of the concept of free tabloids distributed every weekday through the public transport system, launched the Dutch version, *Metro*, on 21 June 1999, the same day *De Telegraaf*, the newspaper with the highest circulation in the Netherlands, published *Spits*. Their joint circulation has risen in three years from 500,000 to almost 700,000 (see Table 6).

	1999	2000	2001	2002
<i>Metro</i>	270	300	370	345
<i>Spits</i>	245	294	325	325
Total	515	594	695	670

Paid Non-daily Newspapers

Paid non-daily newspapers have always played an important role in the Netherlands, mainly in smaller communities that could not support a daily newspaper. Generally, these non-dailies contain only local news and advertis-

ing (only the *Katholiek Nieuwsblad* is a national weekly aimed at traditional Roman Catholic readers). The number of paid non-dailies is declining, as they are facing strong competition from daily newspapers and from free weeklies. The number of paid non-dailies dropped from 134 in 1981 to only 53 in 2002. The circulation is relatively low (277,000 in total). Only three titles are published three times a week, nine titles are published twice a week, with the remaining 41 titles being published once a week. Circulation figures are relatively modest for most titles but they do reach a high proportion of the population in the communities where they are published. Household-penetration percentages of more than 60% are not uncommon.

Title	Circulation	Times a week
<i>Meppeler Courant</i>	18,235	3
<i>Peel en Maas</i>	11,915	1
<i>Soester Courant</i>	11,700	1
<i>Katwijkse Post, de</i>	10,800	1
<i>Hoogeveensche Courant</i>	10,525	2
<i>Woudenberger/Scherpenzeelse Krant</i>	9,050	1
<i>Woerdense Courant</i>	8,913	1
<i>Doornse Krant</i>	8,900	1
<i>Nieuwsblad van Noord-Oost Friesland</i>	8,862	2
<i>Opregte Steenwijker Courant</i>	7,837	3

Concentration is not really an issue; the majority of the papers are published by small local publishers. When we look at the weekly circulation figure of 402,000 (taking into account how many times a week the newspaper is published), we see that the ten largest publishers controlled 62% of the market. In this list there are only three publishers with more than one title (see Table 8).

Free Non-dailies

These newspapers are known in various countries as free papers, shoppers, free sheets, or free weeklies. In the Netherlands, they are called „huis-aan-huisbladen“ because they are delivered door-to-door. They contain advertising and local information. Papers that only carry advertising are not included in the statistics. According to figures for 2001, there are 566 different titles available. Some tit-

Table 8		The Top 10 Publishers of Paid Non-dailies in the Netherlands in 2001		
Publisher	Number of Titles	Circulation (in 1,000s)	Market share (%)	
Wegener	164	5,665	29.1	
De Telegraaf	78	3,503	18.0	
PCM	21	1,455	7.5	
NDC	26	1,202	6.2	
Janssen/Pers	23	1,058	5.4	
Rodi Media B.V.	12	528	2.7	
Grafia Print	14	524	2.7	
Buijze Pers	14	473	2.4	
Uitgeverij Vorsselmans	13	306	1.6	
Others	188	4,727	24.3	
Total	553	19,441	100.0	

Table 9		Publishers of Free Non-dailies in the Netherlands		
Publisher	Number of titles	Weekly circulation	Market share (%)	
<i>Boom Pers</i>	4	87.994	22	
<i>Hoekstra</i>	6	25.429	6	
<i>BDU</i>	3	24.735	6	
<i>Bakker</i>	1	21.375	5	
<i>C. Pet BV</i>	1	21.050	5	
<i>Banda</i>	1	17.724	4	
<i>Harsveld</i>	1	13.900	3	
<i>Langeveld & de Rooy</i>	1	12.840	3	
<i>Eilanden-Nieuws</i>	1	12.824	3	
<i>Van den Munckhof</i>	1	11.915	3	
Total top 10	20	249.786	62	
Total weekly circulation		402.041	100	

les have a circulation of more than 400,000. The total circulation is more than 19 million, which means that the average Dutch household receives three of these papers. Wegener, the largest publisher of regional newspapers controls almost 30% of the circulation. Together with three other companies (De

Telegraaf, PCM and NDC) Wegener controls 60% of the total circulation of free non-dailies. These four publishers control 99% of the regional newspaper market.

Conclusion

In the Netherlands, data on all kinds of newspapers is easily available, not only for the current year but also for the previous two decades. Therefore, gathering information for a European overview of newspapers would be not a problem. However, there are some definition problems, including the definitions for „newspapers“ and „specialized newspapers“. Data on different local editions is not very reliable.

All data on circulation figures is in fact „sold copies“ plus copies for customers, staff and marketing, with the obvious exception of free papers. While all national papers have a full editorial staff, this is not the case for regional newspapers. In almost every publishing company, regional newspapers work together on national and international news, and on features and service information.

Competition does exist between all national newspapers, between national and regional newspapers, and between regional newspapers and non-dailies. There is little competition between regional newspapers because there are only a few regions where readers can actually choose between different regional newspapers.

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Niederlande**Nationale und regionale Zeitungen im Wettbewerb (Zusammenfassung)***Piet Bakker*

Der niederländische Zeitungsmarkt ist sehr konzentriert und wird von nur acht Tageszeitungsverlagen bedient. Die Gesamtauflage der 7 nationalen und 25 regionalen Tageszeitungen lag im Jahr 2002 bei etwa 4,2 Mio. Exemplaren und ist im Zeitvergleich seit 1997 etwas rückläufig. Während die nationalen Tageszeitungen in Vollredaktionen erstellt werden, bestehen zwischen den regionalen Tageszeitungsverlagen redaktionelle Kooperationsgemeinschaften. Der Vertrieb erfolgt größtenteils über den Straßenverkauf. Darüber hinaus stehen vier themenspezifische Tageszeitungen und zwei Gratistageszeitungen zur Wahl.

Die ökonomische Konzentration ist überaus hoch: Nur drei Verlage haben einen Marktanteil von 90% zu verbuchen. Der nationale Zeitungsmarkt wird fast zur Gänze von zwei Verlagen dominiert, der regionale Markt befindet sich zur Hälfte in den Händen eines einzigen Anbieters.

Während traditionelle regionale bzw. lokale Wochenzeitungen heute nur mehr eine geringe Rolle spielen, erfreuen sich die insgesamt 566 Gratiswochenzeitungen mit einer Gesamtauflage von 19 Mio. Exemplaren immer größerer Beliebtheit.

Wettbewerb besteht nicht nur zwischen den nationalen, sondern auch zwischen den nationalen und regionalen Zeitungen sowie zwischen den regionalen Zeitungen und Wochenzeitungen. Wenig Konkurrenz hingegen herrscht zwischen regionalen Zeitungen, weil es nur einige Gebiete gibt, wo Leser zwischen mehreren regionalen Zeitungen wählen können.

Mit der Sammlung bzw. der Kontrolle von Auflagedaten sind das Het Oplage Instituut, die Zeitungsmarketingorganisation Cebuco und die Nederlandse Nieuwsblad Pers (NNP) befasst.