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Evidence Gathering on the current state of the Welsh Newspaper Industry -

THE FUTURE OF NEWSPAPERS; A comparative assessment

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Introduction

The purpose of this paper is to explore recent developments in the UK newspaper industry in the context of press developments in Europe, North America and globally. Innovations in media technologies, increasingly competitive and fragmenting markets for readers and advertising revenues, government media policy, the changing structures of news industries and changing audience requirements for news and the ways in which it is presented and delivered, are impacting on journalists' employment, and changing radically the ways in which journalism organisations and media businesses function. One response to such changes has been to speculate about the 'end of newspapers'. The assumption informing this paper, as well as the evidence it presents, suggest that such predictions are ahistorical, reflect a Eurocentric view of press developments and within the UK, ignore significant differences in newspapers' fortunes deriving from their location in distinctive market sectors. The argument of this paper is that UK newspapers are adapting and accommodating to these developments by changing almost every aspect of their style, form and contents. The declining newspapers titles, circulation and advertising revenues which typify UK and European newspapers, have no counterpart in India, China, Latin America and parts of Africa where the newspaper business is booming.

The Future of Newspapers; Contested Assessments

It is undeniably a pivotal moment in the history of newspapers when commonplace understandings of newspapers extend beyond hard copy newspapers to embrace news content on multiple media platforms which is now delivered by the Internet, pod casts and mobile telephony, more often than by newspaper delivery boys and girls.

There is, moreover, an evident Manichaeism in the different futures which unravel for newspapers in the scholarly literature. Some observers are pessimistic; and not without some justification. They cite the sustained decline in the number of newspaper titles, the dramatic losses in circulations, the growing attractiveness of the Internet and television advertising channels for readers and advertisers and the emergence of free 'Metro' style newspapers, along with a growing public scepticism about media credibility; the recent study by the Media Standards Trust revealed that 75% of readers now believe "newspapers frequently publish stories they know are inaccurate" (Media Standards Trust 2009, p6).

But some pundits spoil a good case by overstating it. American academic Philip Meyer, for example, in *The Vanishing Newspaper*, extrapolated current trends in daily newspaper reading habits since 1970 to conclude, with enviable if dubious precision, that the last reader will disappear "late in the first quarter of 2043" (Meyer 2004, p16). For his part, Bill Gates recently claimed that, "the number of people who buy or subscribe to a newspaper

and read it, has started an inexorable decline". Gates identifies 2012 as newsprint's final deadline (*Seattle Times* 9 May 2007); *Financial Times* journalist John Lloyd, concurs - at least so far as paid for dailies are concerned (Barkham 2006, p14). Climbing aboard this gloomy forecast bandwagon, a special issue of the *Economist* devoted to the "Future of Newspapers" described them as an "endangered species". Sounding the death knell for contemporary newspapers, the *Economist* claimed, "the business of selling words to readers and selling readers to advertisers, which has sustained their role in society, is falling apart" (*Economist* August 24th 2006). Much of the diagnosis here is uncontested, but the prognosis is too bleak.

Consequently, some observers are more optimistic. They acknowledge that newspapers need to strike an urgent editorial and financial accommodation with the web, but they believe that newspapers are adapting both their contents and formats in response to developments in media technology, pressures of market forces and readers' changing requirements for news. They believe this "editorial Darwinism" explains how newspapers have survived previous challenges to their business and editorial environment, often driven by technological innovation. From telegraph to television, newspapers' ability to adapt to changing circumstances has always provided them with a survival strategy and secured their future; this process of adaptation to change is central to understanding the history of newspapers.

Others express even more positive visions for the future of newspapers in which the availability and popularity of new media technologies – in living rooms no less than newsrooms - empowers a growing army of citizen journalists, bloggers and readers wishing to post comments online, to construct a more pluralist and democratic debate about matters of public interest. In this new vision, the role of newspapers becomes more to hold the ring in a genuinely public debate than to dictate an agenda formulated in editorial offices and articulated by journalists. The model of journalism which previously witnessed journalists, columnists and leader writers handing down authoritative opinions in the manner of 'tablets of stone', is retreating to make way for a new journalism which seeks to encourage readers to join journalists in a more open and interactive discussion.

Which vision for the future of newspapers will be vindicated by events is currently unclear, but the most current academic research which is reviewed in this paper, articulates both positions, but a number of central themes or concerns emerge.

Declining newspaper titles and readers?

The precocious pessimism and unwarranted hyperbole of those who wish to proclaim the imminent demise of the newspaper, is clearly unsustainable. It articulates a curiously North American and Eurocentric view of the press which seems blinkered to the explosion of new titles and readerships in other parts of the world; the future of newspapers is more open and considerably more nuanced than some observers imagine. Globally, there is no cause for pessimism about the future of newspapers with the most recent data gathered by the World Association of Newspapers (WAN) detailing unprecedented growth.

Daily paid newspapers, for example, recorded an average 17% growth from 9,533 to a record breaking 11,142 titles between 2002-2006, although rates varied markedly across Asia (33.1%), Africa (16.7%), South America (12.6%), Europe (5.6%) and Australia (1.4%). The circulations of paid daily newspapers also increased by 8.7% across the same five year span to a record high of 510 million copies, while the distribution of free daily newspapers expanded three-fold from 13,795 millions to 40,802 millions. Again, regional

variations are evident with these relatively new free daily newspapers recording extraordinary growth figures of 77% in South America, 65% in Europe but only 18.4% in Asia. Market share is uneven, however, with Europe claiming 66% of the free daily market by circulation, while Australasia manages only 1%. In some settings the growth of newspaper titles and readerships across all sectors has been striking. In India, for example, the 330 daily titles with 2.5 mn readers in the early 1950s mushroomed to an estimated 5,638 titles and 59.1 mn readers in 2001 (Bhaskar 2005, p19). These data offer a sobering corrective to the pessimists' case; the global newspaper business is booming.

It is also important to highlight the distinctive fortunes which newspapers confront in the highly divergent sectors of the newspaper market. In the UK, for example, aggregate circulations of daily and Sunday titles across all sectors are in sharp decline from 38.4mn in 1965 to 32.6mn in 1985, plummeting to 22.7 mn in 2007: 15.7 mn copies lost in the paid newspaper market (41%) with an accelerating rate of decline in reader numbers.

But if the detail in this broad canvas is examined more closely, a different picture emerges. The Sunday tabloid/mid market tabloid newspapers illustrate the most striking decline (20.9 mn copies in 1965, 15.1mn in 1985 but only 8.7mn in 2007), with weekday tabloids faring slightly better but still losing 28.9% of their market since 1985 (12.5mn to 8.8mn), despite the circulation success of the highly popular mid market *Daily Mail*. By contrast, across the same period (1965-2007) the 'quality' dailies have enjoyed 27.5% circulation growth from 2.03mn in 1965 to 2.6mn in 2007 and even in the Sunday market, quality newspaper readerships have declined only 8% across the last four decades; the Sunday popular market has declined by 58% across the same period.

Locally and regionally, the same story fails to make the headlines. Evening papers like the *Birmingham Evening Mail* have lost 54% of their readership between 1995-2005 and morning papers fare little better; the *Yorkshire Post* has lost 36% of circulation across the decade. In Wales the circulation of the *Western Mail* has suffered sustained decline from 94,000 copies daily in 1979 to 61,541 in 1997, 42,578 in 2006 and currently circulates 37,152. The *South Wales Echo* (120,000 in 1979, 74,246 in 1997, 53,780 in 2006 and 44,624 in 2008) and the *Daily Post* (50,000 in 1979, 52,000 in 1997, 39,651 in 2006 and 35,838 in 2008) have suffered similar and striking loss of sales and readership. But the UK's 521 paid weekly and 624 free weekly papers have enjoyed relative stability, with some paid weekly titles showing a modicum of growth.

Those who advocate the pessimist's case, moreover, occasionally underestimate the impact of the emergence of online editions of newspapers, as well as the new 'Metro' style and other free papers which now enjoy substantial readerships and generate advertising revenues for the press industry, compensating in part for those lost by the paid Daily and Sunday editions. In the UK, the ten titles in the Associated Metro series alone, distribute 1.259 millions daily with the *London Lite* and *LondonPaper* adding a further 891,731 copies daily to readers and revenues. Similarly while the readership of the *Guardian* has declined across the last 20 years (487,000 in 1985 compared to 349,000 in 2009), the online *Guardian Unlimited* claims 20 million readers and 147 million page impressions every month.

Lifestyle Change not technology

A second theme suggests that the impact of the Internet, as a factor explaining the decline of the traditional newspaper market, has perhaps been overstated or, expressed differently, other factors – such as the growth of free newspapers which generate revenues but also challenge and cannibalise the content, circulation and advertising

revenues of existing paid titles in the same newspaper group - have perhaps been more influential although they have tended to be ignored. The obvious example here is the curious paradox of the freely distributed *London Lite*, launched to 'prop up' the declining sales of the *London Evening Standard*, which has impacted seriously on both sales and contents of the paid paper recently sold for £1.

Significantly, more sociological accounts identify longer term changes in patterns of work and lifestyles as crucial in explaining the decline in titles and readers. In the US and UK for example, the decline in newspaper titles and circulation in some press sectors, predate the existence of the web; and by a good while! Evening papers in the UK have been losing readers since the early 1980s while the downturn for morning newspapers began in 1990 (Franklin and Murphy 1996, p10). Distinguished journalist Peter Preston nails the argument neatly. "The death of evening newspapers... in their hundreds across the US" he asks, were they "victims of the net?" His answer is worth citing at some length. "The *London Evening News* and the *Star*" he argues:

were killed off long before the net was invented. What disposed of them, and many more like them, was a combination of malignant factors. People didn't work set hours in offices and factories any longer, they worked at home or in industrial estates on the edge of town; they drove home rather than got a train: they found they couldn't get an evening paper delivered any longer because the traffic was too impenetrable: and the paper they could sometimes get - because it went to press at noon rather than 3.30 - didn't have any of the facts that drove purchase... no late racing results or cricket scores, for instance. You could get that stuff on TV anyway, in the office canteen, in the betting shop, in the pub, off Ceefax or the radio (never mind the net!). So the reason for buying a paper which often wasn't in the right place at the right time anyway, was hugely diminished.

Simply, life changed but evening newspapers didn't, or couldn't. A whole slice of newspaper life died in the States and is withering here now as the evenings that remain are turned into single-edition late morning papers, updated on the net in a further burst of suicide fever fuelled by short-term accountancy. Note the basic situation, though: the net may be the deliverer of the coup de grace here, but it's not truly to blame for what's gone wrong over decades. Human living patterns, changing, moving on, have done that. Complain about the dying years of evening journalism and all you're doing is complaining about life (Preston 2008, p643).

But there is an additional, more general, argument in this context of overstating the impact of the Internet on the future of newspapers. This argument stresses the 'resistance' of a range of actors such as journalists, to the incorporation of new technologies in the production of commodities whether newspapers, lollipops or motor cars. This argument suggests that technological innovation and capacity is a necessary but not always sufficient condition for change. The impetus which technological development provides may be slowed, resisted and knocked off course by a number of political, economic and cultural factors which mediate its impact. In the newspaper industry, the strength, character and direction of this resistance to change reflects a host of factors which may be workplace specific (journalists' attitudes to change, for example, along with the strength of trade union membership); title specific (a newspaper's market position, circulation strength, profitability); company or group specific (the relative willingness of different newspaper companies to commit resources to change), and finally resistance may be reader or consumer specific (readers' preferences for certain types of news, how it is

presented and on which platform, as well as their willingness/ability to pay) (Williams and Franklin 2007).

But while it is important not to exaggerate the role of the Internet in triggering changes in the traditional newspaper industry, a third and perhaps obvious point of consensus stresses the significance of the web's current impact on newspapers, as well as its influence on their likely future development.

The Internet, Newspapers and Journalism

Advertising –

One significant feature of the Internet for newspapers is the potential threat it poses to their vital advertising revenues (Picard 2008). But scholars typically stress both the possibilities and opportunities, which online editions of newspapers offer for enhancing advertising revenues, as well as the threats posed by this potential predator of newspapers' advertising share (Berte and De Bens 2008). Globally, Internet advertising revenues certainly increased in 2005; and by a striking 24%. But such growth is from a relatively low baseline. In 2006 the Internet won a modest 5.7% share of the \$425 bn global advertising market, while newspapers secured 29.4% of revenues, rising to 42.3% when magazines are included. Newspaper advertising revenues, moreover, have risen by an average 15.6% between 2002-6 with regions such as Latin America (32.5%), Asia, Pacific and India (20.8%) and USA and Canada (15.7%) enjoying above average increases. In some countries the growth in newspapers' advertising revenues has been unprecedented; 128% across five years in China. Revenue projections for 2006-2010 average 17% with some regional variations (WAN).

News Contents and Participatory journalism –

A second impact of the Internet on newspapers has been the explosion in the availability of news online which has been accompanied by the promise of increased interactivity between readers and journalists (beyond that provided by the letters' page), the prospect for readers to contribute to news stories by posting comment and writing blogs, along with journalists' eager courtship of citizen journalists and user generated content. Online editions of newspapers also have the potential to create new formats for writing and telling stories, along with radical changes in page design and layout as those pages are increasingly scrolled at the click of a mouse rather than turned between a moistened thumb and finger. Early enthusiasts of these changes identified a coming 'revolution' in editorial contents and formats which promised nothing less than a 'whole new journalism' (Quandt 2008).

But the summary conclusion of much of the scholarly literature suggests that online news has failed to live up to these expectations. Thorsten Quandt's analysis of the editorial contents of ten online news media in the USA, France, Britain, Germany and Russia suggests that 'the revolution did not happen'. The news sites in his study revealed some distinctive national features reflecting particular journalistic cultures and audience interests, but broadly they exhibited a lack of multi media content (only 7 of the 10 sites enhanced more than a fifth of their stories with multi media content), an absence of options for direct contact and interaction with journalists (such as email or a single chat link to journalists in any of the 1600+ news items analysed), as well as missing bylines, references to authors or attributions to news sources (such as news agencies) which did little to contribute to transparency in the editorial process. Significantly, much of the

editorial content was quite traditional and focused on the coverage of national political and economic events, human interest stories, crime, sport and culture (Quandt 2008).

Online news has also disappointed advocates by its failure to deliver on some aspects of its promise of a more participatory journalism. Reporting the findings of a study of readers' participation in online newspapers in nine countries (Belgium, Croatia, Finland, France, Germany, Spain, Slovenia, United Kingdom and the USA), David Domingo and his fellow researchers report a "general reluctance to open up most of the production process to the active involvement of citizens" so that "the core journalistic culture remains largely unchanged". Readers are offered only limited opportunities for engagement with the editorial process which are largely restricted to opportunities to "debate current events" while being firmly excluded from other aspects of news production (Domingo et al 2008).

A similar study examined the user-generated content initiatives (UGCIs) of 12 UK newspaper websites. Findings revealed a "dramatic increase" in opportunities for contributions from readers, but concluded that while news sites seemed eager to "open their doors to the public," editors retain their "traditional gate-keeping role", reflecting concerns about "reputation, trust and legal liabilities". Consequently, the contributions of citizen journalists to these UK sites are monitored and moderated with only 12 of the 118 blogs identified in the sample, allowing readers to post directly without comment being vetted by journalists (Hermida and Thurman 2008). Consequently, news organisations are eager to elicit 'one off' or opportunist photographs of celebrities, accidents, or natural disasters, taken with a mobile phone, but this is where participatory journalism typically ends. The contribution of 'citizen journalism' to mainstream news organisations was exemplified on 7 July 2005, when the BBC received approximately 22,000 e-mails and text messages, 300 photos (50 within an hour) and several videos of the London bombings: the BBC began receiving (UGC) within 13 minutes of the Buncefield oil refinery explosion, 5,000 images by lunchtime and 10,000 by the end of the day (Bivens 2008).

Journalism Practice –

The Internet has exercised a more discernible effect on daily journalism practice in local and national newsrooms. Virtually all print journalists are now required to work across multiple media platforms which involves not only delivering copy for print and online editions of their newspapers, but also shooting brief video clips, reading pieces to camera, as well as recording podcasts which can be downloaded from the newspaper's website. This commitment to multiplatform working has not been accepted uncritically by journalists' trades unions who complain that news rooms are already understaffed and that removing journalists from work on the print editions to produce video clips for use online, perhaps without adequate training or additional remuneration, is inefficient, deprives newsrooms of key workers and detracts from the core business of the company which is the print edition. Journalists claim the inevitable consequence here is a decline in the quality of the print product (Williams and Franklin 2007).

The shift to an 'online first' policy on news reporting, moreover, means that a newspaper's website might cannibalise and publish the paper's major news story of the day as much as three to four hours ahead of the print edition's evening publication, leaving the newspaper without a strong front page story. Consequently print journalists are no longer 'breaking' the news so much as discussing existing news, thereby encouraging the further 'featurisation' of news journalism (Williams and Franklin 2007). Early publication of news online, moreover, poses considerable dilemmas for journalism practice. If a story posted on a newspaper website wins a good deal of readers' attention and attracts considerable

comment as the news day unravels, for example, will editors be tempted to retreat from an earlier decision made at conference to lead with a different story in the print edition, and replace this original story with the popular web item; in brief will (and should) the 'popular' judgement of readers trump journalistic assessments of news value (Williams and Franklin 2007).

Research also reveals that journalists attach great value to the Internet and the ways in which it facilitates many day to day news gathering and reporting routines. A survey of 239 journalists in 40 news outlets in 11 European countries, which asked journalists to rank traditional and online methods of researching news stories, discovered that the three most popular methods included journalists' everyday use of web search engines alongside more traditional methods such as face to face conversations and telephone conversations; likewise emails and web news sites ranked equally with the use of archives and discussions with newsroom colleagues. Journalists also declared (overwhelmingly) that they would miss the Internet in the newsroom and that without the web they would find it difficult to keep up to date with news, as they use the web routinely to verify information and to find information on local and national government. The study also discovered that few journalists believed that bloggers and citizen journalists posed a significant threat to their ways of working or journalism in the round (O'Sullivan and Heinonen 2008). The Internet is now a formidable presence in all newsrooms, is highly valued by the majority of journalists and is deeply embedded in their daily newsgathering and reporting practices.

Online Journalism; Business Models

Paradoxically, despite the significance of the Internet to journalists and the future of newspapers, there is no agreed and consensual industry-wide business model for how to turn a profit from online editions. But since newspapers are essentially economic organisations, the further development of online editions will prove problematic unless they can move to profitability. *Independent* Executive Editor Simon Kelner is highly sceptical claiming that "there is absolutely no model for a newspaper website to make money" (Thomas 2006). Such intransigent claims ignore recent research (Dal Zotto 2008; Bleyen and Van Hove 2008), but the majority of online news sites are "a financial drain on the newspapers that support them" (Crosbie 2004). Guardian Unlimited is the only newspaper website in the UK which currently makes a profit. The first financial review by the BBC Trust published in June 2008 highlighted that *bbc.co.uk*, the most elaborate and widely consulted news website in Europe, overspent by £36mn in 2008, overshooting its allocated budget of £74.2mn by 48% (*MediaGuardian* 2 June 2008, p8)

Newspaper companies have identified three sources of income from online news; subscription, advertising and 'ad hoc' sales (Herbert and Thurman 2007) although each identified element in the revenue stream is problematic and there are economic tensions between them. Consequently companies' business plans typically deploy a judicious and inclusive balance of all three.

The problem with subscriptions to online editions, compared to paying the cover price for a newspaper, is that it is not clear why anyone should pay to buy news from the former when broadly the same news is available for free from many other newspaper websites. So charging is problematic except for worldwide quality brands which specialise in a particular news/information sector, such as *FT.Com* and the *Wall Street Journal online*.

But if companies are successful in persuading readers to move online, they cannibalise their own print readership and reduce their revenue base. The consequences of this

cannibalism are severe. Advertising represents newspapers' vital revenue source accounting for up to 80% of paid papers' revenues and 100% of free newspaper income. Web based advertising revenues are growing (and rapidly) but from a low baseline and constitute a very modest proportion (5.7% in 2006) of global revenues (\$425 bn) while newspapers receive 29.4%. Each convert to online editions is won at a substantial financial cost; such victories are pyrrhic. Estimates of the relative value (measured by loss of advertising revenues) of a 'print reader' compared to an 'online reader' vary between 25 to 100 to one. But companies cannot return to a subscription based strategy since charging for site access reduces reader traffic and with it the vital advertising revenues.

Companies compromise by selling what is popular with readers but unique to their brand. Consequently in the UK, *The Times* charges for its crossword, the *Independent* for the features by its distinguished Middle East correspondent Robert Fisk. Ad hoc sales involve newspapers using their valued brand to associate themselves with a range of goods from travel, cars, property and dating. These goods and services provide the fastest growing revenue stream for the sites (20-30% a year) but also attract further reader traffic and in turn, advertising income (Franklin 2008, p p26)

Newspapers' Changing Style and Contents

A final theme to emerge in the discussion of the future of newspapers centres on the changing shape (literally) of newspapers, the emphasis on newspaper relaunches and redesigns, as well as the constant 'tweaking' and shifting of editorial content resulting in an enhanced editorial emphasis on news and features about lifestyle, fashion, leisure and travel as well as a tendency to focus on celebrity and human interest stories. The reasons informing such shifts are broadly economic. Newspapers are obliged to operate in increasingly competitive and fragmented markets for readers and advertising revenues and it is this 'hypercompetition' (Brin and Drolet 2008), more than developments in media technology, which has motivated newspapers' constant changes to their design and contents to meet readers' shifting requirements for news and its presentation.

Technological change has played more of an enabling or under labourer role in this context, with the latest printing presses offering the possibility of colour pictures on every page, the inclusion of illustrative graphics, an enhanced quality for photographic reproduction and crisper typefaces. Redesigns are a constant feature of editorial life; in June 2008, the London *Times*, produced its revamped 72 page newspaper, with colour on every page and Leading articles rather curiously tucked away on page 2 some twenty pages remote from the remainder of the Op-Ed pages. The changes to newspaper format, layout and design are striking and undeniable; the shifts in contents have proved more contentious.

Globally, there has been a move to tabloid formats and away from the old broadsheet newspapers; 28 newspapers moved to tabloid size in 2005 confirming a trend of 86 'converts' since 2001. In the UK, owners and editors have preferred to use the term compact to describe their new products in an effort to avoid the anticipated opprobrium associated with the term tabloid and to defuse any suggestions of 'Dumbing down'.

The move to compact editions was pioneered by *The Independent* in September 2003 and undoubtedly reflected the title's sustained loss of readers from 400,000 in 1990 to 220,000 a decade later. Research revealed that compact editions would be popular with young readers, women and commuters but, more significantly, with advertisers. Sales of the new style *Independent* soared by 40,000 a day; *The Times* promptly launched its own compact edition. The *Guardian* editor was deeply concerned about the potential impact of the shift

to tabloid on editorial contents and argued that the change in size would inevitably be reflected in content (Rusbridger 2005). He opted for the Berliner format, more common on mainland Europe and exemplified by *Le Monde* which, in terms of page size, sat somewhere between the tabloid and broadsheet.

Visually the most striking feature of the new compact editions is the increased use of photography for telling stories, especially on the front page above the fold. Given the shrinking page size, there are obviously fewer stories with fewer words on each page. The *Independent* exemplifies this design shift by adopting a 'poster' style front page featuring a single story, illustrated by a colourful graphic or photograph with virtually no text or even headline. The editor's preference for columnists and editorial comment above 'straight' factual news coverage is reflected in his proud boast that the *Independent* is a 'viewpaper' not a newspaper.

Similar trends in editorial style and contents are evident following the Quebec newspaper *Le Soleil's* recent move to tabloid (Brin and Drolet 2008). The paper, for example, offers a new column devoted to provincial politics but also features: an expanded Arts and Entertainments section; a gossip column about Hollywood celebrities; a column offering advice about child rearing written by a psychologist who hosts a popular reality television programme, and all this in a new chatty and friendly style of writing. News stories have disappeared from the front page which simply features a large photograph and accompanying headline. Local and regional newspapers illustrate similar editorial shifts. In her study of three French regional newspapers *Ouest-France* (Rennes), *Le Parisien* (Paris) and *Le Progrès* (Lyon), Aude Rougier (2008) identified a number of editorial changes designed to win readers including an emphasis on more 'personalised' news, a focus on themes such as education, the environment, health and housing, along with an emphasis on readers' letters and a readers' forum.

But while this trend to move to tabloid newspapers is global, it is not always motivated by declining sales but occasionally by a mix of economic, political and cultural factors. Wasserman (2008), for example, notes the remarkable popularity of the new South Africa tabloids like the *Daily Sun* which have 'taken the market by storm' creating a 'tabloid revolution'. They are highly popular with readers achieving unprecedented readerships of 3.8 millions. Their editorial content offers highly personalised and often sensationalised accounts of issues like poverty, HIV and crime, but significantly offers its black working class readership a voice on these and other issues. For their part, the South African journalism establishment has been highly critical of the new tabloids alleging that they ignore professional commitments to objectivity and neutrality and bring journalism into disrepute because of their sensationalism and the partisanship of their coverage; a charge reminiscent of mainstream (and competitor) newspaper criticism of the innovatory editorial style and contents of the popular penny press in the US in the 1830s.

Summary

Newspapers - nationally, regionally and locally - are experiencing considerable changes to all aspects of their 'form' and 'content' as they react and adapt to radically shifting economic, social, cultural and technological circumstances. Newspapers understood literally as 'news' printed on 'paper' now constitute a relatively modest part of that multimedia mix which newspapers have become, as journalists increasingly report stories on new and multiple media platforms and via new delivery systems of online, podcasts, video and mobile telephony. These shifts have substantive implications for the economic viability of newspapers, as well as the number of journalists and other workers they

employ, as managers struggle to develop a business model which generates profits from an increasingly web based journalism.

The style and contents of newspapers have also shifted to accommodate readers' changing demands for news and the ways in which it is presented. These developments in the UK press exemplify similar changes experienced by newspaper in Europe and North America, although there is marked variation across market sectors. In other regions of the global economy (China, India, Latin America and parts of Africa) the newspaper business is booming with flourishing readerships and growth of newspaper title.

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