The European Newspaper Market

Social Media Use and New Business Models

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Introduction

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Background and Motivation

The newspaper market, as well as other industries, has been facing a lot of changes over time. These changes are the result of constant developments in technology, the economy, communications and social standards. New improvements have an effect on the population, its norms and expectations. It means that industries need to adapt to new models in order to cope with a changing society. Every company needs to be aware of the new developments and its current situation on the marketplace. For this reason it is important to monitor and review changes and the new expectations of customers.

One of the main technological improvements of the past decade has been the advent of the global system of computer networks and, in consequence, the appearance of online services. The Internet has changed common standards a lot and influenced almost every industrial sector. For instance, it has affected the shopping industry, allowed electronic business and telecommuting. Moreover, the Internet has become a relevant political tool because of the development of social networks. Social networking services enable fast and effective communication as well as information gathering. They are also significant tools in advertising and provide people with entertainment. That is why it is important to analyze how companies use these services and if they help them to build a successful brand image. Furthermore it is relevant to investigate how such websites are used and whether they have many enthusiasts or not.

These issues are especially significant in relation to the newspaper market, which has been experiencing a revolution and a total modification of its business model in the past few years. Some companies have managed to follow the changes and are now successfully operating in different sectors. However, there are also a lot of firms which were not able to understand and adopt the modern developments and are therefore either currently out of the market or struggling to survive.

Research on the newspaper market and the changes that have occurred and affected press companies is vital and relevant to the current market

situation. Moreover, it is of great importance to many countries from all over the world. A good understanding of the present situation might enable companies to analyze their models once more and find solutions to unsuccessful practices. Additionally, research undertaken in several different countries enables us to check whether the crisis in the printed press concerns every region or not and shows how successful firms actually operate in order to retain their customers.

As has been mentioned before, the Internet has initiated many changes in a huge number of industries. However, it has probably had the most significant impact on the newspaper market. Since the advent of the Internet, information can be reached more easily and is more available to people. The Internet offers more freedom and a wider va riety of topics as well as personal selection. Readers are now able to search for the news that is interesting to them, select themselves which sources they want to read from and whether they want to pay for information or not. Hence, users do not have to buy printed newspapers anymore but instead can search for news online. An analysis of the opportunities that are offered online is necessary in order to understand why nowadays so many people are more eager to reach for online news rather than printed gazettes.

Main Aims and Scope

This research mainly aims to investigate the use of social media by the biggest newspapers in different European countries. The regions that were selected for this study were Belgium, Bulgaria, France, Germany, Poland, Spain and the United Kingdom. The goal of the work was to analyze the newspaper market in each country. In order to do so, approximately 30 newspapers from each country were chosen according to the highest circulation figures. This work presents a brief history and evolution of the press as well as the changes that have occurred in recent years. It will therefore be possible to assess which countries have been the most susceptible to the impact of the Internet.

Additionally, the purpose of this research was to observe how each country has changed as a result of the advent of the Internet. It analyzed how the newspaper industry has changed and transformed its business model. A further aim was to discover which newspapers have been most successful in adapting to the new changes and which gazettes failed.

It is also important to examine to what extent different countries have been influenced by online services. It was therefore vital to investigate how

social media such as multimedia, social communities, own communities, mobile services and user-generated content are used by each country's newspapers. This helps to assess the level of development, and as a result, the current market situation.

Moreover, numerical examples of different practices used by international newspapers will be presented in order to validate the market and its capabilities.

Fundamental Concepts

Here, two key concepts of the study are briefly introduced. As the study is was mainly concentrated on the use of social media by the biggest daily newspapers, it will be interesting to first describe the characteristics of the daily press and define the term social media.

Daily Newspapers

Daily newspapers are publications that are usually issued every day, however sometimes an exception is Saturday and/or Sunday. They are targeted to a mass audience and therefore the number of copies per day can be counted in thousands or millions. The weekend editions of daily newspapers normally have a tendency to be larger in size, contain more advertising and specific sections. They also usually cost slightly more. Most of the daily newspapers are published in the morning and cover the latest and most up-to-date news. In addition, dailies might also consist of other sections such as sport, opinion pieces, entertainment or weather forecasts. It is also common that they report breaking news stories.

The main difference between daily and weekly newspapers is their size. Daily newspapers only cover news that has just happened whereas weekly gazettes usually report information from the whole week; they are therefore thicker.

The daily newspaper market has greatly declined over the past years. These changes have taken place in most of the countries around the world. However, some regions still have a relatively high number of newspapers, especially in relation to their small population size. These countries include Sweden, Norway and Denmark.[1] It is also important to consider the national

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1   McQuail, D., Siune K. (1998)

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and regional newspapers. The press market in each country is represented by a certain number of newspapers with a national distribution and regional reach. The regional press is mainly dominant in certain areas. In many countries there is huge competition between the local markets.

Most countries, in particular in Europe, have a limited number of national daily newspapers. They are usually owned by the biggest press holdings. The market is also harsh for newcomers to the national daily press sector.

Social Media

Another term that is fundamental in relation to this research is social media. This can be defined as a form of interaction among the population. Social media mainly involves generating, sharing and exchanging information. The term relates to various platforms and technologies that enable participants to create their own content for the web and exchange it with other people.[2] According to Michelle Chmielewski from the company Synthesio, social media

> »is not about what each one of us does or says, but about what we do and say together, worldwide, to communicate in all directions at any time, by any possible (digital) means.«[3]

Therefore, social media can be considered as the whole range of the Internet and mobile technologies that make it possible to transform one-way communication into interactive dialogue.

Social media platforms have drastically altered the nature of information transmission both by companies and individuals. They are usually shaped in the form of magazines, different kinds of blogs (for example videoblogs or photoblogs), social communities, podcasts and various services, concentrated either on music, photography or videos, social bookmarks or rankings. Social media platforms are very dynamic since they are usually being constantly improved in response to the needs of users, as well as by competing services and developments in the field of economic and technological infrastructure.[4]

Nowadays, the most popular social media services are Facebook, MySpace, Twitter, LinkedIn, YouTube, Flickr and Google+. It is also interesting to observe that the number of social networking platforms is growing.

2   Cohen, H. (2011)
3   Cohen, H. (2011)
4   Dijck, J. (2013)

Some countries have developed their own national websites in order to improve communication. Here, an example might be Orkut, which is a free social networking website connecting friends, mostly in Brazil. Also, Nasza-Klasa.pl is a platform which enables mass communication among users, in particular from Poland.[5]

Social media is highly relevant to the newspaper market in many countries. It is a significant part of communication, and the sharing and gathering of information. According to the Newspaper Association of America,

> *»social media platforms are expanding the reach of newspapers.«*[6]

It is now easier to share one's favourite article with a network of people; it only involves clicking a button. In this way, it is also more convenient to gather readers and spread information all around the world. This means that the social media have several advantages over the press market. However, as has been mentioned before, it has had a huge influence on the decline of the print newspapers' circulations.

Further parts of this report will investigate the newspaper market and its relation to the social media portals in more detail.

Overview of Chapters

This work is divided into introduction, research methodology and seven main chapters to which individual conclusions are attached. Moreover, at the end of the report there is a final summary bringing together all the gathered data and information.

The first section is focused on the newspaper market in Belgium as well as the usage of social media by the biggest gazettes. First, the country is presented briefly as well as its different newspaper markets; these are Dutch, French and German. After that, the report analyzes changes that have occurred in the Belgian press market in recent years. One such shift is the introduction of electronic newspapers. Besides this, the chapter contains an analysis of social media in Belgium that includes looking into multi-media usage, mobile services and offers, user-generated content, and social communities as well as other communities. In addition, the first section examines whether Belgian newspapers use any additional features within the social media sector. At the end of the chapter the challenges the press market in Belgium faces will be considered.

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5   Jain, S. (2012)
6   O'Leary, S. (2014)

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The second chapter investigates the newspaper industry in Bulgaria. As with the first section, the overview of research on the press market in Bulgaria will start with an introduction covering the marketplace as well as the new developments that have come along over the years. Further, the 30 biggest Bulgarian newspapers will be presented and examined in relation to their use of multimedia: photos, picture galleries and videos. The next section will investigate how newspapers in Bulgaria use mobile devices, social communities and blogging. There will also be an analysis of which newspapers actually use these tools to communicate with their readers. In the conclusion, all the gathered data will be briefly summarised.

After that, the report focuses on the French newspaper market. It will begin with a table of the biggest newspapers in France as well as an overview of the French press market. The history of the newspapers and major recent changes will be presented and the importance of digital media on the French newspaper market discussed. Also, different newspapers will be compared regarding their use of social media. The next section will cover the evolution and future of the press in France. The conclusion will summarize to what extent the French market has adopted the process of digitalization.

The following section focuses on the German newspaper market. This part will first show what the German newspaper market looks like. Some statistics will be presented and discussed. Also, the market changes in the last two decades will be investigated. Then the research will consider the use of social media by the 30 biggest newspapers in Germany. Each gazette will be shown in a table and analyzed in relation to its use of multimedia, mobile services, user-generated content, social communities and other potential extra features. The main points of the research on the German press market will be collected in the conclusion.

The next chapter concentrates on the Polish newspaper sector. First of all, there will be a general overview of the traditional press market as well as different media that have influenced the transmission of information. Further, some general research on Polish newspapers will be shown, based mainly on their distribution and circulations. Additionally, the use of multimedia, social communities and other social media will be analyzed.

After that, the report takes the Spanish press market into account. At the beginning, there will be an outline of the Spanish history of the press and the Internet. Then there will be a discussion on how nowadays the traditional press is changing into convergent media. The main Spanish newspapers will be presented and commented on, and the use of multimedia, mobile services, user-generated content and social communities by Spanish

newspapers will be covered. In conclusion, the new era of the press market will be explained.

Subsequently, it will be shown how the newspaper market currently looks in the United Kingdom and how it has changed. First, the most important daily newspapers in the United Kingdom will be outlined. Then, the research evaluating how each gazette uses multimedia on its website will be described. Further, the question of whether the British press market provides its readers with various applications available for mobile devices will be considered. The use of user-generated content (rankings, comments, polls) will also be assessed. An important part of this chapter is the evaluation of the function of social communities on the newspaper market.

Research Methodology

As has been mentioned in the first chapter, the main goal of this research is to examine which and how many social media tools are used by the biggest newspapers in different countries. Moreover, it is essential to estimate how the press from various regions uses social media. During the period of the research, the websites of the biggest newspapers in each country were analyzed and social media platforms and their relation to newspapers were investigated. The results were firstly recorded in an Excel sheet and then applied to the chapters. The research investigated several sections – these were multimedia, mobile services and offers, user-generated content, social communities, own communities and additional features. Each section was investigated in terms of specific criteria that are briefly discussed below.

Multimedia

Multimedia represents content that uses different kinds of forms. It includes mainly photos, videos and photo galleries. These aspects were further examined in connection with the websites of the examined newspapers in different countries. In addition, the concept of the media library was investigated in some regions.

When it comes to photos, it was assessed how the newspapers use visual content. To do so, approximately five till ten articles from each newspaper were selected and then analyzed. Sampling was necessary, since it was not practical to check all the articles within a website. The research examined whether the use of photos was dominant, of intermediate importance, or if

the website was only text-based. If an article was combined with several pictures, it was considered to have a dominant usage of pictures. On the other hand, articles with around two or three photographs were regarded as using an intermediate amount of visual content. Lastly, the website was based on the written rather than visual content when none or one picture was used. In this section it was also interesting to consider which kind of newspapers is more likely to use visual content. The samples were chosen within different gazettes in order to investigate whether there is any relationship between the use of pictures and the newspaper's content.

Videos were assessed similarly to pictures. First, sample articles were chosen from each newspaper. They were further examined in relation to the number of videos either supporting the articles or placed separately on the website. Also, the newspaper could have either many short films, an intermediate number of videos or not put them in at all. In addition, several gazettes were examined in terms of their presence on YouTube rather than in a special section on their own website.

The next part concerns media libraries, which, according to the Duden, are a collection of audio-visual media.[7] In this case the category media library was considered to be present if there was a special area on the website where users could watch videos. This area should also allow readers to navigate between different categories of videos.

A photo gallery is defined as a compilation of photos on the web.[8] Here, each website was viewed in order to find any special sections comprising pictures. Further, if there was no separate part for photo galleries, it was checked whether the articles themselves were supported by galleries or not. Here, a sample number of articles was also chosen. Based on these findings, the research then assessed whether the newspaper used photo galleries or paid more attention to text.

Mobile Services and Offers

For the purpose of this research the following mobile services and offers were examined: iPad apps, apps for iPhones, mobile portals and e-papers. All of these services were investigated for nearly every country selected. However, some of them concentrated either on applications or online editions of gazettes.

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7   Duden (2013)
8   Duden (2013)

The information about applications was gathered either on the newspaper's website, on the Google Play platform or any other store offering the applications. The newspaper was considered to provide an app for iPhones or iPads, if any kind of application was available. Additionally, a few examples are given in order to present the content of some apps.

An e-paper is the electronic version of a newspaper.[9] The e-paper can usually be accessed on the website or an app of a newspaper. The newspaper was considered to have an electronic paper if it could be found either in a downloadable PDF format or as a part of an app.

Mobile portals are compressed versions of websites which are optimized for mobile devices.[10] Whether a newspaper offers a mobile version or not was checked with a mobile device.

User-Generated Content

The user-generated content section covers content that is created by users themselves. Here, subjects such as rankings, article comments, wikis, polls, reader articles and reader multimedia were analyzed.

For this study, different rankings of the newspapers in each country were investigated. Internet research was done in order to check which newspapers were the most popular among readers. Moreover, some newspapers were also examined, taking into account the most commented on, recommended and read articles, pictures or videos. These rankings, with a classification of their content, were found on the newspapers' websites.

The question of whether users are able to leave a comment on a website or not was also investiged. The comments were usually placed under the articles. The newspaper was considered to offer article comments when a special area was available enabling readers to leave an opinion. It is also important to consider whether users have to be registered to post a comment or not and if the website gives the opportunity to sign in to any social networking portal or if the users have to do it manually.

Wikis are open online pages which can be edited by users.[11] If a newspaper offers such system, wikis were considered to be present.

In addition, the reseach examined if a newspaper interacts with its readers by offering polls. The polls can comprise current topics or general

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9   Duden (2013)
10   Ehow (2013)
11   Gabler (2013)

subjects which always interest people. Mostly, the polls ask for readers' opinions. The newspaper was considered to offer polls, when questions with multiple answers were provided on the website.

Reader articles and multimedia include pictures, videos and texts which are created and sent in by the readers of a newspaper. Texts can also be generated in the form of letters from readers. If the newspaper enables readers to send in any multimedia or texts and some of them are published on the website, it was regarded as offering readers' articles/multimedia. If it is only possible to send in readers' letters and they are only published in the printed newsletter, the newspaper was not considered to provide this service.

Social Communities

A community enables users to conduct discussions, chats, express an opinion on the blogs or various panels. It helps people to communicate more easily.[12] Social communities are networks between friends or users with similar interests. In these networks people can exchange as well as discuss various information, pictures and videos.[13] For this research the following networks were examined: Facebook, StudiVZ, Twitter, YouTube, Flickr, Xing, LinkedIn, Myspace and Google+. However, not all of these platforms were considered for every country. Most of the research focused only on the most popular ones.

The main characteristic of networks such as Facebook, StudiVZ and Google+, is that they have a broader focus. On the other hand, websites like YouTube, Flickr, Xing, LinkedIn and Myspace are organized around special topics. For example, YouTube is a network particularly used for videos; Xing and LinkedIn are networks for business contacts. Myspace provides a platform for musicians and creative people. Meanwhile, Flickr is mainly a platform for photography.

The objective of this research was to see whether a newspaper has its own managed profile on any of the above-mentioned networks or not. Moreover, the research examined which websites have the highest number of enthusiasts and how frequently these platforms are used by the newspapers.

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12   Itwissen (2013)
13   Itwissen (2013)