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The life of news and the wealth of media companies in the digital world: *Reader revenues and professional practices in a post-COVID world*

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On this paper

This paper is a result of the project *News, networks, and users in the hybrid media system. Transformation of media industries and the news in the post-industrial era* (RTI2018-095775-B-C43). We present our insights on the latest movements of the Spanish media industry and their influence in the conception of news production during 2020. Specifically, we focus on the implementation of news business models, namely paywalls and membership models, and the movements regarding intellectual property to protect the industry – and their impact on journalists as well. The irruption of the COVID-19 pandemics has accelerated some tendencies in this respect.

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Abstract

Many factors are influencing, in the latest years, rapid movements towards a deep paradigm change in the media industry and, therefore, in the nature of news. We examine some of those movements and mutations in the latest times, in which a profound crisis of the media –most especially, the press industry- has been even more affected by the COVID-19 health situation. Due to it, some changes seem to be accelerating very quickly. The great financial crisis of 2008, and the transformation of new communication practices due to the adoption of the World Wide Web, marked a decline in the sales of the printed press, without a clear replacement business models for many media on the Internet. During 2020, especially in Europe many media have decided to implement paywalls. Finally, we foreseen a necessity of investigating to which extent economic inequalities are affecting the consumption of news in the digital world.

Keywords

Media industry; Paywalls; Media crisis; COVID-19.

Introduction

"Maybe media is the only business which has managed the digital transition worse than the music record industry", said to a Spanish digital medium, *El Confidencial* in its edition of the 16th of October, 2016, Stephen Witt, a journalist himself and the author of *How the music got free*, a book on the crisis of the recorded music as we knew it until the arrival of massive digitization. He was not the first in comparing these two cultural industries: in 2012, Paschal Preston and Jim Rogers published an influential article on the crisis of both music and media industries, so they identified "multiple shifts and innovations" and a "potential influence of professional norms and values" (Preston and Rogers, 2012: 77) Since the implementation of the World Wide Web in the mid-nineties of the twentieth century, many media all over the world decided to give their contents away for free, with some exceptions, the *Wall Street Journal* from the very beginning and, later on, some generalist media as well (*The times*, for instance, in 2010; in 2002 *Elpais.es* implemented a paywall which lasted for two years and reached 40,000 subscribers, to abandon it). During many years, media have been wondering how to make money, how to monetize contents using the sector's jargon, but it was not until 2020, unexpectedly in the midst of a global pandemic, that a jump into paywalls has happened all over the world, following the *New York Times*' model (Nafría, 2017).

After *Our path forward* memorandum by the newsroom staff in October 2015 and *Journalism that stands apart* by the manager *2020 group* team in January 2017. The number of subscribers has been multiplied by ten in a decade, from the 50,000 initial ones in 2012 to more than five million in September 2020. At the same time, the incomes from the digital edition were superior than those of the printed one: 185.5 million dollars and 175.4 million dollars.

We intend to explain, preferably for the Spanish case embedded in the transnational market, how the current situation has been reached and what are the mechanisms and strategies that the mass media, now simply one of the agents (perhaps still the main one, but certainly not the only one) that act in a post-industrial information market (Anderson, 2013) and in a scenario that has been defined by A. Chadwick as a hybrid media system, where many other agents, from active users to sources informative, intervene in a more multifaceted and complex scenario than the one de facto monopolized by the media industry in industrial society. We thus intend to explain, on the one hand, and on the 25th anniversary of the emergence of the World Wide Web and the birth, as we know it, of journalism on the Internet, what has been the evolution of the news in the digital environment in historical perspective , but above all throughout the development of the project, monitor and interpret the different movements that the media industry, not in isolation but embedded in this hybrid communication system, carries out to reposition itself in this new and complex informational reality. Thus, we offer a short introduction on what have been the changes that the news has undergone as a commodity. This is a concept which appeared explicitly in the eighteenth century, when a journalist and entrepreneur of that time's Venice, Giovanni Cattaneo, said that "the news are a commodity which, like all other commercial things, is bought either with money or with exchange" ["le nuove sono una merce che in simiglianza de tutte le altre cose commercevoli si acquista o col denaro o col cambio"] (mentioned by Infelise, 1997: 193). Second, what are the characteristics of all kinds that the news presents at present, both from the point of view of narrative languages (including characteristics such as interactivity, hypertextuality, multimedia, personalization, modularity) and economic and legal treatment , especially from the point of view of intellectual property and competition. Likewise, we will refer to the values attached to the news as a cultural asset.

We intend to explain, to a certain point, what have been the changes and evolution of the journalistic profession, its values, its configuration, presence and regulation in industrial and post-industrial society, and the competition they face from other agents present in the information process, such as active users or the information sources themselves, in the digital environment. Especially, we will concentrate in the first part of the paper on what is the evolution and transformation of the media industry, with special attention to the Spanish case, due to the deep crisis that the World Wide Web has brought to journalism.

We will, therefore, mention strategies of adaptation and resistance by the profession and the media) and we will take into account the structural and legal aspects, the adoption of business models and what digital journalism has meant in perspective as an emerging form of journalism in a scenario considered disruptive.

Mainly legacy media tend to perceive Internet as a platform to overturn their contents rather than an own one with its specific characteristics.

25 years after the invention of the World Wide Web, we now have enough perspective to analyze what have been the profound, structural changes that this new platform has brought to the landscape of the media industry - and especially for print, which roughly turned 400 years old in 2005 - and for the journalistic profession. The situation has been summarized by the Spanish news

publishers as "there was never so much interest in the news and we never had so little income".

Almost a decade has passed and legacy media are still dealing with some core controversies regarding key aspects of the journalistic profession: business models, production routines and credibility crisis in relation to precariousness

Our proposal is based on Andrew Chadwick's concept of the hybrid media system, a scenario in which the so-called legacy media have lost their role as a quasi-monopoly in the treatment of news and current information. One can speak of a structural crisis of the mass media, and particularly of the newspapers, which have become, both in Europe and elsewhere in the world, powerful lobbies that pressure institutions to legislate in favor of their interests. A clear example is how large press publishers have acted before the European Union to ensure that an exclusive intellectual property right for newspapers and press agencies is included in the new Directive on Copyright in the Digital Single Market, in 2018. Other countries, like Australia, have joined in the movement towards making technological giants, like Google, pay for using the news. The media industry has faced competition from other actors: the active audience and users as authors, social networks, new platforms such as blogs and new formats (multimedia and interactive), the empowerment of information sources as transmitters of news that does not always need, or at least not as in other times, the mediation of journalism, make us wonder to what extent journalism and the media, largely products of an industrial society, will not be in a moment of a complete redefinition.

From free to paywalls: Towards a sustainable model

The history of online media on the World Wide Web started around 1995. From that moment onwards, media took a position on the Internet, unaware or not that it was auguring a very quick and deep change on media as we knew them. After many essays on how to present and deliver news electronically, for instance doing research on flat panels –it will not be until 2010 that the iPad popularized and made it profitable an already invented technology- media companies felt unavoidable to be on the Net. Shovelware –putting printed contents directly on the digital edition- was the most common strategy. It was unthinkable at that point that online journalism could be the dominant player and a disruptive technology after all. Towards the end of the century, the possibilities of the online edition helped modifying the way in which news were consumed and produced. It was possible to make news publicly accessible at one click, to make available large amounts of information, to refresh news as they were happening, to give a voice to the most engaged readers at least and, later on and when the band width made it possible, to offer videos to complement written texts, not to mention the possibilities of hypertext. Around 2002 a new interactive and multimedia product was foreseen (Díaz-Noci, 2013), and the need for a proper model as well. However, most media companies considered that they could not charge a price for the news they offered on the Internet, and lost a chance to make added value profitable. Some attempts, beyond the economic press, were unsuccessful, for instance *Elpais.com* established a paywall between 2000 and 2004 but decided to open it again since the company did not achieve as many subscribers as it expected.

Just before the great crisis of 2008, many media conglomerates, and also many scholars, embraced the convergence model, quite enthusiastically maybe (García-Santamaría and Pérez-Serrano, 2020: 9). Some scholars alerted that the media companies were in a digital crossroad, and that it was time to search for new business models on the Internet. At that moment, undercovered by the convergence mantra, many companies were trying to reduce costs instead of enhancing innovation, although at that precise time, just after the effects produced by huge economic crisis of 2008 appeared to be structural, those media organizations knew for sure that the ads on the printed media –and on their Internet editions- was declining and that the inversion on the Net was not so sufficient to compensate those loses. Andreu Casero was categorical in this respect, when he said that advertising was not generating enough revenues to ensure the viability of the digital media, and that a *freemium* paywall seemed a reasonable option to be explored (Casero, 2010: 600).

Undercovered by the convergence mantra, many companies were trying to reduce costs instead of enhancing innovation.

The crisis of media was worsened from 2007-2008 onwards, because of the general economic and financial world crisis and by the entrance of more competence with new players, such as great telephone companies, Internet companies and other platforms (García-Santamaría and Pérez-Serrano, 2020: 1-2). Crisis means opportunities as well. Or, at least, surprises. Buzzfeed, for instance, after ending 2019 with economic losses and applying draconian measures including shortening the salaries to avoid firing its journalists –anyway, 15% of its journalist world wide were fired, and its Spanish edition was closed-, found out that after the COVID-19 crisis of the spring of 2020 the company achieves profits again.

Paying for the news

As for 2012-2012, the investment of advertisement in both printed and digital media was balanced, but from the onwards the situation was increasingly worsening for the printed ones and improving for the online ones. Even if media companies tried to face the problem merging and verticalizing many media and products (blogs, webs, etc.) so the digital measures could take it all to have larger audiences, the fact is that ten years later, the reality was that 57.1% of the advertisement investment in Spain went to social networks and search engine companies like, most especially, Google (IAB Spain, 2019).

The decision of making readers pay for at least some contents, the most value-added ones, has caused a decline of single users.

As for 2019, a scarce 12.2% of the Spanish readers were willing to pay for the digital news, according to the Digital News Report by the Reuters Institute of the Oxford University, and a similar percentage in Latin America (13%, according to Luminate/Provoker's report) but more than 56% of the users paid for digital entertainment platforms. New generations are more loyal to platforms that they are to brands (Essling, 2020), and they are more avid consumers of audiovisual, television contents. Actually, television stations' websites are considered a heavy competitor for other kind of online news sites, a situation even worse in Europe –and in Spain-, where public broadcasters are strong and compete in the advertisement market, whilst they are maintained by public budgets. It could be enough if it is true, as many media companies assume, that the more loyal readers, or *heavy users* (7-15% of the total audience) is able to generate 85% of the total revenues. For them, utility and exclusivity is important (Essling, 2020). The typology of online media readers has been examined by comScore, one of the companies that measure the audiences: even if they are sure that some engaged readers are ready to pay for quality content, a generation is not loyal to brands. The so-called Generation Z, the youngest ones born between 2001 and 2015, prefer to get their news through social networks (55% of them) than directly from news sites, and only 34% of them confess that they consume news on a regular basis (66% of the millennials do). Media organizations need to be very aware of those change: the new consumers want more personalized news (push services), get them from mobile devices and are not very inclined to pay directly for them (Essling, 2020).

According to some figures in Spain 58% of the readers get the news exclusively through the online media, but

80% of them have enough reading the headlines, with no need to click for further information and, of course, pay for it (Periodismo 2030, 2020). For instance, *El país* had 71,000 in the autumn of 2020, and at the same time launched a cheaper subscription offer for Latin America. So far, they are not so impressive figures, and the rest of the Spanish digital media have lesser subscribers: *eldiario.es*, whose model is that of *The guardian*, a membership, had 56,000 paying members, and *El mundo*, with a freemium paywall, had 50,000 subscribers. The digital-born media had lesser than that: *El confidencial*, whose paywall was implemented after the explosion of the pandemics, had 15,000 at the end of the summer of 2020 (19,000, according to their own figures), and *InfoLibre*, which in October 2020 signed an agreement with *eldiario.es* to create adapted contents to different dissemination windows for their respective members, 12,800 (Carvajal, 2020). At the same time, the fall of the incomes of the main generalist newspapers of Spain was, in the same period, of 20%, according to data provided by the *Asociación de Medios Informativos* (AMI) of the country. Just to compare figures, *El país* sold 69,000 printed newspapers a day between January and September, 2020, less than the amount of subscribers they confess they have gathered to that point. Let us have another fact in mind: many readers do not access digital news directly from the media websites, instead, they share them (Dwyer and Martin, 2017). The decision of making readers pay for at least some contents, the most value-added ones, has caused a decline of single users. Just to mention an example: as for September 2020, just a few months after the company decided to implement a paywall in March of that year, *elpais.com* lost 8.5 million single users.

Media know that they have to attract subscribers, but that they need to retain them as well: they are a volatile resource and competition is hard.

In this situation, some other movements appeared. One of them is media concentration. Considering that not all the companies will survive this succession of crisis, it is to be thought than at least some of them will prefer to merge with some others, or be absorbed even, and not to fade away (Birkinbine and Gómez, 2020). The situation has some particularities in Spain, since some scholars have detected a higher level of oligopolistic practices than the European average (García-Santamaría and Pérez-Serrano, 2020: 9).

Inertia works against many media conglomerates. Fernando Yarza, president of Henneo and of the World Association of News Publishers (WAN-IFRA) stated that “for many newspapers the paper is more important than the digital version", so many movements towards a digital-first or a fully digitally conceived life cycle of news is hampered by this conception. The transition from the printed world to the digital lasts for more than 25 years for many legacy media.

NEWS FATIGUE AND CHANGES IN THE NEWS PRODUCTION

The possibilities of the digital technologies shed some important shadows on the initial optimistic discourse. The impact of the click has had an enormous importance on how things have changed in journalism. One of the most obvious impacts, which maybe the adoption of business models or media based on the readers' revenues is changing, is the obsession on the metrics based on the single user and, therefore, on practices such as the clickbait. If the search for as many clicks as possible is being substituted for an strategy based on attracting and retaining subscribers (or members, in the membership model of, for instance, *The Guardian* or *eldiario.es* in Spain), then the contents themselves and the professional routines may be suffering a change again, substituting the breaking news -and the frivolous contents inserted to attract clicks- by more elaborated, serious contents with higher journalistic values. This trend towards a more elaborated narrative of news may have been strengthened by the COVID-19 (Lemos Mattos Salles and Campo dall'Orto, 2020): Paschal Preston and Jim Rogers defined it in 2012: the found out "a declining role of hard news in favour of softer and more celebrity-focused news, a shift towards more entertainment, sports and lifestyle orientated media content, and a consequent squeeze on foreign news and current affairs reports" (Preston and Rogers, 2012: 78).

On the other hand, the clearest impacts of the click are those introduced in advertising, now based on the measure on exactly how many readers access to the contents behind the hyperlink, which has meant the decline of an advertisement-based business model. Applied to the salaries of media workers it means that it is perfectly possible to make them measured and rewarded in terms on how many links has the news generated as, for instance, has happened in the United States. On October 19, 2020, the journalists of the *Sacrament bee news guild* addressed a letter to the new CEO of the MacClatchy company because, they argued, the company which owns the newspaper "is trying to tie journalists' pay to the number of clicks their stories get" and this "pay-for-clicks encourages controversy and quantity over clarity and quality" (see the complete text at https://sacbee-guild.com/). At least, media such as *The economist* and *The times* have made public their preference for lesser news, not so many constantly refreshed information and a more relaxed flux of news. If this is consolidated as a solid trend, then immediacy will no longer be the main characteristic of the digital language applied to the news. It is a consequence of what Preston and Rogers described in 2012 as "new managerial strategies" that "further erode the autonomy of professional journalists, while always relative or vulnerable" (Preston and Rogers, 2012: 79).

The impact of the click has had an enormous importance on how things have changed in journalism.

There are some other trends that need to be confirmed in the following years. Some of them point towards the likely adoption of reader strategies adopted to the more limited access to online news. This a conclusion showed in Rebold's report of 2020 on the influence of paywalls in the consumption of online news, mainly less traffic and habits related to the adaptation of the informative diet to the offer of media: a lighter, less deep consumption of news, with less time devote to read news which means at the same time fewer news items read and, at the same time, a greater inclination to consume podcast and multimedia contents more related to entertainment than to hard news, and limited in many cases to the reading of headlines and snippets available for free. Curiously: those parts of the news shown by news aggregators such as Google News and, more recently, Google Discover.

Other strategies

CEDRO, the collecting society in charge of getting the compulsory fees imposed to news aggregators by the Spanish Copyright act, reformed in 2014 (which decided Google the shutdown of its Google News service in Spain in 2015), started a campaign to make organizations aware of the necessity of paying for licenses for using digital contents from media in 2020, and at the same time sued Google in November 2020 on the basis of unfair competition, joining the movements of France and Australia.

In Australia, the Competition and Consumer Commission (ACCC) launched at the end of July 2020 a first draft for a media bargaining mandatory code driven by the government to rule the relation between news media and digital platforms like Facebook or Google, since it calculated that Google took 47% of online advertising in that country and Facebook 21%, which both companies answered angrily: since Google considers that it is true "that the fall in newspaper revenue between 2002 and 2018 was mainly the result of the loss of classified ads to online classifieds businesses" they argue that Google News is not diminishing the volume of media's business (Silva, 2020; an interpretation of what happened to the media industry was made public by Google in September 2020, Hopkins, 2020) and Facebook said that "publishers gain more from us than we gain from news content, which is highly substitutable" (mentioned in Turyill, 2020). Facebook has warned, at least in the United States, that from October 1, 2020, the company could take actions or limit the access to content provided through the platform by those media, meaning that, for instance in Australia, they could avoid paying to those media companies simply tackling them to upload their contents to the social network. Even in the United States, the government has adopted some very relevant decisions, for instance in September 2020 the Justice department approved that Taboola and Outbrain should be merged. Both of them are competitors of Facebook and Google in the ad field, and are usually used by media to enhance the consumption of clickable contents. In many countries, it is not enough that Google invested more than 150 million euros in its Digital News Initiative program between 2015 and 2019, and the fact that this money has gone to legacy media to palliate the decline of their revenues, or at least this is the conclusion of a research conducted by the Otto Brenner Foundation. The same study concludes that this strategy is addressed to have a milder treatment by those influential media, especially in Germany and France, United Kingdom and Spain (Fanta and Dachwitz, 2020). France is an interesting case: on the one hand, the government approved to subsidize the media industry in 2020 giving 840 million euros, and because of the COVID-19 health crisis 483 million euros were added in September 2020. Besides, Emmanuel Macron's government approved a tax reduction of 30% for those readers who purchased a subscription. In a parallel way, the competition courts obliged Google to talk with the French newspaper publisher to reach an agreement on compensating them for using their news. Google was aware of this situation before, since the giant American company created an instrument to remunerate news publishers, called Google News Showcase, and signed several agreements with important German and Brazilian media companies. It is plausible that this will extend to some other countries, assuming that the necessary implementation of the European Directive on Copyright in the Digital Market enacted a provision on compensation for news to publishers that is being enacting in the national laws of the member states, starting with France in 2019.

Some conclusions

"Publish less, but publish better" (Jenkins, 2020). Media are aware that they have high stakes in their future businesses and have begun playing their cards, in a quite tentative way. For instance, they know that they have to attract subscribers, but that they need to retain them as well: they are a volatile resource and competition is hard. This is the reason why many media organizations are diversifying their subscription offers. To do so, they need to adapt their offers to the local markets, but also to have good information on their users' behavior. Media are convinced that they have to develop retention strategies, for instance employing personalization, push strategies – and that is the reason why old, well-known services, such as newsletters and podcasts, know a second life these days.

Journalism faces a lack of credibility while 'Solution Journalism' is highlighted; the need to experiment with genres, formats, languages and narratives demands a re-consideration about the relevance of the interface design.

It is doubtful to which extent heavy, engaged users will be sufficient to balance income statements, but for the time being it is all they have: since readers and buyers of the printed product are inevitably declining, their only growing opportunity are their digital editions. They can rely on subsidies as well, but this is a laugh now, cry later strategy. Even economic measures to sustain the press like the ones approved by the French government are exceptional. This is the reason why press publishers are trying some other strategies as well, for instance legal reforms to make Google and Facebook pay. Whether or not will those movements successful in the long run is unsure.

The strongest and most secure option seems to be to enhance quality and credibility (Laminate, 2020), or at least that is what engaged readers say. It means innovation. Media are convinced that to bet for a return to the roots of journalism values is a good choice: the international news publishers (FIPP) insisted in September of 2020 that media need a mission, and that they need to rely on professional values. Resilience is another factor to be considered when analyzing how news media production works in this scenario (Porcu, 2002).

It is to be seen what is the real, longtime and deep influence on journalistic routines. Some research has been made on that during the times of the 2008 crisis (Benito Cabello y Pérez Cuadrado, 2019). The adoption of new business models may have a remarkable influence on the way news are done, and the ways they are elaborated to engage loyal readers. Beyond wishful thinking expressions, the combination of paywalls or membership models' adoption and the way that the pandemic has influenced the working routines of a profession – and an economic sector- in its transition to a full digital scenario is yet to be described in all its dimension. It is not the same to be a global medium, which is the case of *The Washington post* (60% more foreigner readers in 2019-2020) and of *The New York times*, which calculates that more than 100 million people may be paying for news in English in 2030 (now they have 6% of that market), or for local media. In this sense, the following years will be decisive to see which are the successful strategies.

There are some other questions we need to consider. One is the fight against precariousness. At least the French government, a country in which the *pigistes* are traditionally a very important part of the profession of journalist, has adopted some measures. Since the media business is dramatically changing and new revenue models based on the reader are trying to be consolidated, compensation reappears as a central issue to be considered. Not just how Google, Facebook and other giants compensate publishers for using the news, but how people who professionally produce those news outlets are compensated as well. Reporters are now fighting in many fronts, for instance against automatization of news production. Good news, however, is that if reader revenues business models mean less immediacy and breaking news and more elaborated pieces of information able to engage readers and subscribers, then journalist may concentrate in reports, that can of news that artificial intelligent is not capable to produce, for the time being.

The great hope for the media publishers is now to place their trust in what they call the *homo subscriptor*: the younger people who assume that the economy is based on flat rates, a fact stated by Zuora's *digital economy index* (https://www.zuora.com/resource/subscription-economy-index/). It is difficult to reach this goal without doing many changes in how news is produced and presented. First of all, the pandemic has brought out to which extent it is feasible to produce information outside the physical newsrooms. Nevertheless, the major changes will come from a change in the consumption habits and behaviors. Even digital-born media are no longer growing in terms of audience, according to a report by the Pew Research Center makes it clear that native online media are stagnated from 2016 onwards (Barthel and Stocking, 2020).

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The DigiDoc Reports, started in 2016, aim to offer in an accessible, open-access way the results of the projects conducted by the Research Group on Digital Documentation and Interactive Communication,
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The *Online News Research Papers* series is devoted to present the insights and results of our research line on digital journalism and online news,
as well as in the intellectual property law applied to the digital world.
This paper is a result of the project
News, networks, and users in the hybrid media system. Transformation of media industries and the news in the post-industrial era
(RTI2018-095775-B-C43).

We present our insights on the latest movements of the Spanish media industry and their influence in the conception of news production during 2020. Specifically, we focus on the implementation of news business models, namely paywalls and membership models, and the movements regarding intellectual property to protect the industry – and their impact on journalists as well. The irruption of the COVID-19 pandemics has accelerated some tendencies in this respect.

The great financial crisis of 2008, and the transformation of new communication practices due to the adoption of the World Wide Web, marked a decline in the sales of the printed press, without a clear replacement business models for many media on the Internet. During 2020, especially in Europe many media have decided to implement paywalls.
Finally, we foreseen a necessity of investigating to which extent economic inequalities are affecting the consumption of news in the digital world.

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