

The Changing Business of Journalism and its Implications for Democracy

The business of journalism is widely held to be in a terminal crisis today, in particular because the rise of the internet has drained audience attention and advertising revenue away from existing media platforms. This book, the first systematic international overview of how the news industry is dealing with current changes, counters such simplistic predictions of the supposedly technologically determined death of the news industry. It offers instead nuanced scrutiny of the threats and opportunities facing legacy news organisations across the world in countries as diverse as the United States, the United Kingdom, France, Germany, Finland, Brazil, and India as they transition to an increasingly convergent media landscape. *The Changing Business of Journalism and its Implications for Democracy* establishes that this is no time for fatalism, but for a renewed commitment to journalism and its role in democracy – from journalists themselves and from media managers and policy-makers, all of whom can learn from professional, commercial, and policy developments beyond their own countries, developments such as those analysed here.

“The Changing Business of Journalism and its Implications for Democracy, as the only rigorous global survey of a situation usually discussed on the basis of anecdote and unproved assertion, is an indispensable and necessary work. It ought to open the way for real progress in reinventing journalism.”

Nicholas Lemann

**Dean and Henry R. Luce Professor at the Columbia University
Graduate School of Journalism**

“This is a very detailed and rich analysis of the structural changes in today’s business of journalism: the media in many countries face a deep crisis caused both by new technologies and more general economic circumstances while in others they are experiencing rapid growth. In both cases the entire structure of the field is undergoing a dramatic change in terms of professional practice and in how media are organized and run. This book represents an indispensable tool for all those who want to understand where journalism and democracy are going today.”

Paolo Mancini

**Professor at Università di Perugia and co-author of
Comparing Media Systems (Cambridge, 2004)**

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A man reads the newspaper as another uses his laptop in Stefan cel Mare Park in Chisinau July 30, 2009.



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and Rasmus Kleis Nielsen



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Executive summary

The business of journalism is widely held to be in serious crisis today, in particular because of the rise of the internet. This has potentially disastrous consequences for forms of democratic politics that have evolved hand-in-hand with private-sector mass media as we have known them in the twentieth century. This book includes chapters from around the world critically evaluating the notion of crisis, identifying both the common underlying cyclical, technological and long-term challenges that commercial news media organisations around the world face *and* the important, persistent national differences in audience demand, market structure and media regulation that suggest different likely future scenarios for different countries.

While the news industry has certainly suffered severe declines in revenues in several countries in recent years, the latest downturns seem to be more closely connected with the relative degree of dependence on volatile revenue sources like advertising and on the differential impact of the global recession than with the spread of the internet. This is illustrated perhaps most forcefully by the difference between countries like the United States and the United Kingdom, where the private media sector have struggled in recent years, whereas countries like Germany and Finland – with comparable levels of internet penetration and use and strong public service media organisations operating on several platforms – have seen much more stable developments in the business of journalism. Both the news industry and the journalistic profession are changing rapidly as new tools are being appropriated by journalists, sources and audiences, but the supposed crisis is far from universal, and the outcomes of current transformations far from certain.

The differences identified and documented in this book not only highlight the enduring relevance of inherited national differences in audience demand, market structure and media regulation, but also that, despite deterministic (and often fatalistic) claims to the contrary, there is still time for the business of journalism to reinvent itself and move into the twenty-first century, provided media managers, professional journalists, and policy-makers and the citizens they represent are willing to learn from different developments around the world.

The value of the chapters to follow lies in their detailed assessment of particular challenges or cases, and we will not attempt to summarise them here, but simply highlight a few particularly important points from each. In Chapter 1, Rasmus Kleis Nielsen and David A. L. Levy present a wide array of data to establish that different national media systems are developing very differently even as legacy media face

comparable cyclical, technological and long-term challenges. In Chapter 2, Robert G. Picard reminds us that general interest news never was a profitable business in itself, but always cross-subsidised by other interests, whether commercial or political. In Chapter 3, Sacha Wunsch-Vincent reviews recent technological developments to show how new information and communications technologies have changed the value chain of news businesses, how journalists work, how audiences use news, and how they are increasingly transforming the wider communications environment as new players like aggregators and search engines rise to prominence. In Chapter 4, Frank Esser and Michael Brüggemann show how well the German media system has withstood current pressures, and argue that, in so far as there are any signs of crisis there, it is not a crisis for democracy or journalism in general, but at most a strategic crisis for newspapers in particular. In Chapter 5, Hannu Nieminen presents an overview of developments in Finland, where most commercial legacy media organisations also seem to have weathered the storm relatively well, despite high levels of internet penetration and use and the presence of a strong public service media organisation in YLE. However, Nieminen points out, the post-war media policy consensus within which this apparently sturdy media system developed may now be unravelling. In Chapter 6, Alice Antheaume underlines that crisis is nothing new in the French press, still constrained by systems of distribution and production developed to deal with post-Second World War shortages and never subsequently reformed, systems that today leave the newspaper industry in perennial crisis and reliant on periodic bailouts by the state. In Chapter 7, John Lloyd reviews the situation in the United Kingdom, discusses the extent to which new forms of peer-to-peer production can make up for what is lost when inherited forms of journalistic work are displaced or destroyed, and underlines the enduring relevance of traditional news journalism. In Chapter 8, Michael Schudson reflects upon the case of the United States, where the current crisis has hit first – and hardest – and sketches out likely scenarios for the immediate future and their democratic implications. Chapters 9 and 10 turn the focus to the business of journalism in two emerging economies where the picture looks rather different. In Chapter 9, Mauro P. Porto underlines not only how the Brazilian media are still struggling with debt acquired during the 1990s, but also how many parts of the sector, in particular TV but also the press, are now profiting from sustained economic growth, increasing literacy, and declining poverty. In Chapter 10, Daya Kishan Thussu shows how dramatically the Indian media have grown since the sector was liberalised in the 1990s, but also how most of the content produced is largely ‘Bollywoodized’, focusing on entertainment and sensational soft news rather than hard news covering public affairs. In Chapter 11, Rasmus Kleis Nielsen and David A. L. Levy write about current policy discussions; they underline the need to take into account the widely different situations the media industry in general and the business of journalism in particular face in different countries – even when confronted with comparable challenges – but also the need for national policy-makers to look beyond their traditional national policy toolkits.

4. The Strategic Crisis of German Newspapers

Frank Esser and Michael Brüggemann

Introduction

This chapter argues that, in spite of the economic crisis that has affected the media in Germany, the infrastructure of the German media system is still suited to providing for accountability journalism as a core element of the democratic constitution of society. The conditions for journalism are still more favourable than in some other Western countries, due to stable market structures, policy provisions for public service broadcasting and a media culture heavily influenced by the idea of a public sphere as a critical forum for debate about issues of common concern. There are, however, pressures that will likely aggravate in the long run if left unresponded to. This chapter identifies five countermeasures pursued by German media organisations to tackle the challenges of declining revenues from traditional advertising, shifting audience preferences, and the internet. As a complementary strategy, German publishers have drawn up a wish list of media policy responses designed to improve general framework conditions of the press, and they lobby very hard in Berlin and Brussels for their implementation at the national and European level. Assessing the overall scope of the current difficulties, the chapter concludes that we are observing a 'strategic crisis of newspaper publishers' but no general media crisis, and certainly no crisis of democracy in Germany.

The infrastructures of accountability journalism

Germany's media market is one of the biggest in the world in terms of newspaper circulation, advertising budgets, number of journalists, and number of news outlets. The market composition has been remarkably stable in recent decades. The *infrastructure* discussed below is part of a broader *culture* of public communication that is influenced by the concept of 'Öffentlichkeit' (public sphere) as elaborated most prominently in the works of Jürgen Habermas and rooted in the idea of self-government guided by the free and rational public deliberation of citizens. This culture of public communication is articulated in broadcasting regulation with emphasis on the idea of public service rather than pure entertainment, a sound professional culture of journalism with a focus

on analysis and exchange of opinions, and a well-established culture of newspaper reading. Three pillars provide for the relatively stable infrastructure of accountability journalism in Germany.

1. Following the model of the BBC, a *strong public broadcasting* structure was established after the Second World War and regulations were introduced that also oblige private channels to include a minimum level of journalism in their news programming. The public broadcasting scene is very rich: Germany is one of the few countries in the world with two rival nation-wide public TV groups (ARD, ZDF) which compete not only with private channels but also with one another. Public broadcasting was installed to provide the 'Grundversorgung', i.e. to cover all basic audience needs with regard to information, education, and entertainment as defined by German media law. In addition to this wide range of public service channels, there is a multitude of commercial TV stations with two big chains, RTL group and Sat.1/ProSieben group, as the main players. Table 4.1 shows that the average time spent watching different TV channels and their market share remained remarkably stable over the last decade.
2. The second pillar of stability is made up of the *well-established publishing houses* that dominate the print media market in Germany, some of which have become big players in the global publishing market. The top three publishing houses are Bertelsmann with a turnover of €18.8 billion, Springer (€2.6 billion), and Holtzbrinck (€2.5 billion) (figures from 2007 as reported by Dreier 2009: 258). Only Springer AG is listed on the stockmarket (since 1985) but half of its shares are in family hands. Holtzbrinck is still owned by the different heirs of the founder of the company; Bertelsmann is partly in family hands and partly owned by its own foundation (Bertelsmann Stiftung). Publishers like Axel Springer pursued at the same time political and economic missions. Therefore, in spite of not being profitable for many years the conservative quality newspaper *Die Welt* was subsidised by Springer with the profits from other businesses of the publishing house, in particular the tabloid *Bild* (which sells more than three million copies every day, making it the world's fifth biggest daily newspaper: WAN 2009). This culture of publishing to contribute to public discourse has been giving way to a more commercial logic. This change is linked to the heirs of the newspaper founders taking over the business from the founders who mostly started the newspapers shortly after the end of the Second World War.
3. The economic strength of the publishing houses is grounded in a deep-rooted *division of the market along regional and editorial lines* which provides for monopoly dividends in the respective markets. The regional press occupies three-quarters of the daily newspaper market, and even the national newspapers have a strong regional base (e.g. the *Süddeutsche Zeitung* based in Munich and *Frankfurter Allgemeine Zeitung* based in Frankfurt both draw a large chunk of their readership from their

respective area). The German press market had already consolidated in the 1960s and 1970s. It resulted in five large publishing companies that control 45 per cent of the daily newspaper market share (Röper 2008). The remaining market share is in the hands of medium-sized companies which are often run by families and could count on profits well above a 10 per cent return on investment thanks to their local monopolies. Furthermore, the national broadsheet market is divided along ideological lines. With historical roots in the party press, newspapers still can be clearly classified as being more or less liberal or conservative. Regional roots and political orientations go hand in hand with a strong reader loyalty: readers subscribe to their newspaper rather than buying it at the newsstand and they are even willing to pay higher prices for their papers as subscription prices increase. Today, the sales amount to about half of the revenue of the newspapers in Germany (BDZV 2009) – a high share compared to many other countries. Challengers to these market structures are fended off rather aggressively, as could be seen when foreign investors tried to introduce free sheets in German metro areas. Local publishers immediately fought back with their own free papers and withdrew them again once the invader had been finished off.

This infrastructure helps make the German media system less vulnerable to economic pressures. The German media are less commercialised and less exposed to the vagaries of the stockmarket and pressures from private equity investors. Publishers can count on relatively stable streams of revenues thanks to the solid division of the market. But this comfortable situation may be a disadvantage in the long run: publishers have become used to high profits and may not yet be sufficiently under pressure to appreciate the need for future-oriented innovations.

Journalism under pressure

The current worldwide economic crisis hit the German industry hard. It led to a cut-back in advertising expenditure by companies and, in 2009, led to rapid falls in advertising revenues for the German media. While this is worrying for publishing houses, more relevant for the future prospects of journalism will be other more long-term developments. Journalism faces challenges arising from three broader processes. The first concerns the revolution in communication technology based on digitalisation and new networks of communication. The development of digital TV and radio, the internet and new mobile devices for receiving and exchanging news offer opportunities for journalism to become free of the traditional time and space constraints of public communication and to interact with its audiences. At the same time, the economic model of commercial journalism is undermined. The second challenge is a broader process of social change that (using the new technologies available) drives young audiences away from the traditional mass media. And the third challenge is the broader process of commercialisation that turns journalism into a business that is more than anything else oriented towards satisfying investors' needs rather than providing public goods. All three processes together interact with the current economic crisis and put journalism under pressure. In order to explore the nature of the crisis, we will first examine the audience for journalism in Germany; then we analyse the revenues

sustaining commercial media organisations; finally we examine how commercial logic is pushing journalism towards crisis.

Pressure 1: media usage trends and the special role of the internet

The search for crisis symptoms in journalism in Germany might naturally start by investigating whether journalism is losing its audience. So far, this is not the case but there are changes in patterns of media use which may become a problem for traditional mass media in the long term.

A comprehensive report on communication and media commissioned by the German government found an 'impressive stability in the usage of traditional media'. Over the years, the time spent on media consumption in general has increased, with a growing trend of parallel use of different media (Hans-Bredow-Institut 2008: 373). As can be seen from Table 4.1, the general patterns of media use have remained fairly constant between 1999 and 2009. Looking at usage, television is the leading medium with regard to daily reach and time spent watching. Daily newspapers continue to reach more than 70 per cent of the population (Hans-Bredow-Institut 2008: 369–71). Not surprisingly, the internet is more widely used and has become part of the daily media repertoire of many people, but as Table 4.1 illustrates in terms of both the percentage reached among the German audience and average time of usage it cannot yet compete with the traditional media; 43 per cent of Germans think that the daily newspaper is the most credible source of information, followed by public TV and radio; online services come last at 6 per cent (data from 2004 as reported in BDZV 2009: 376).

A crisis for the traditional media might nevertheless be lurking under the surface of seemingly stable patterns of media use. There is a slow erosion of the reach of the daily newspaper, even though there was the comparatively high level of more than 70 per cent market reach and an average of 20 million copies sold per day in 2009. Nevertheless, press readership has been slowly eroding since the late 1980s. Different types of newspapers are affected to different degrees: while the tabloid *Bild* lost one and a half million buyers in the last decade, national quality dailies and weeklies defended their position, and in a few cases (*Die Zeit*) even expanded their reader base (Table 4.1).

The general losses cannot be blamed on the rise of the internet exclusively, as newspapers started to lose readers much earlier, parallel with the rise of commercial television and changing lifestyles of the young. The group of 14 to 19 year olds has a drastically different media repertoire from the average German media user (Hans-Bredow-Institut 2008: 373). German teenagers spend ten minutes reading a newspaper as opposed to 123 minutes surfing the internet per day. There is a clear age gap emerging, with under 30 year olds using less print and more digital media. Therefore, print is not replaced by web usage, in the sense that people are quitting their print subscriptions in order to get their news from the web. Web users are younger than the print audience and they grew up with the internet as their primary source of interaction among their peers and – to a much lesser degree – as source of news. Whether the younger cohorts will ever come back to printed media – or grow a habit of daily news consumption – is an open question. For now the comforting news for German newspapers publishers is that, even among the under 30s, every second person regularly reads newspapers and that there is a core group of highly educated and well-paid readers below 30 who read the paper as much as the older age groups do. In addition to reading the paper they also make intensive use of other media channels including the web (Köcher 2009: 116).

Table 4.1. Major news outlets and their market share in Germany – ten year trend

Average Daily Media Use: Minutes Spent (Daily reach)	1999	2009
Newspapers	30 ^a (78%)	28 ^c (71%)
TV	203 ^a (73%) ^a	228 (71%)
Radio	205 ^a (79%) ^a	182 (76%)
Internet	17 ^a (29%/month) ^a	70 (48%)
Print Market: Circulation Sold in Millions (Daily reach)	1999	2009
Daily newspaper sector	24 (78%)	20 (71%)
Regional newspaper sector	n/a (68%)	14 (59%)
Tabloid newspaper sector	6 (21%) ^a	4 (21%)
Selected Flagship Newspapers: Paid Circulation Per Day, Mo-Fr, in Thousand^a	1999	2009
<i>Süddeutsche Zeitung</i> (Munich, quality daily)	424	417
<i>Frankfurter Allgemeine Zeitung</i> (Frankfurt, quality daily)	417	365
<i>BILD</i> (Berlin, tabloid daily)	4446	3075
<i>Der Spiegel</i> (Hamburg, weekly news magazine)	1050 ^d	1016
<i>Die Zeit</i> (Hamburg, weekly newspaper)	496 ^e	502
<i>Westdeutsche Allgemeine Zeitung</i> (largest regional daily)	875 ^f	819
Television Market: Minutes Per Day (Share of Daily TV Consumption)	1999	2009
ARD (largest public channel)	26 (14.2%)	26 (12.7%)
ZDF (second largest public channel)	24 (13.2%)	26 (12.6%)
Regional (all regional public channels combined)	25 (13%) ^b	28 (13.5%)
RTL (largest commercial channel)	27 (14.8%)	26 (12.3%)
SAT.1 (second largest commercial channel)	20 (10.8%)	22 (10.5%)
ProSieben (third largest commercial channel)	16 (8.4%)	14 (6.5%)

Data: Media Perspektiven Basisdaten 2000, 2005, 2009; BDZV 2009; ARD/ZDF-Onlinestudie; Langzeitstudie Massenkommunikation 2000, 2005. Notes: a= data refer to the year 2000; b= data refer to the year 2001; c= data refer to the year 2005; d= data refer to the year 2008; e= IVW 1/1999 and 4/2009; f= IVW 1/2008

Pressure 2: revenue trends and the special role of advertising

High profits are not something that one expects from a publishing house these days, but for Axel Springer AG the first quarter of 2010 saw profits rising to a record 18 per cent return on investment (EBITDA margin). This example illustrates that the situation of the printed press is not as dire as in other Western countries. Print revenues are under pressure due to losses in advertising, particularly in the classifieds market, but both advertising and sales revenues are still strong. In fact, hardly any other countries in the world generate higher incomes from advertising and sales than the German press does (WAN 2009: 57–9).

In 2008, the economic crisis led to a severe fall in advertising investment and revenues. Overall, the media's share of the advertising budget was heavily affected by this downswing. The net advertising income of the media fell by 2 per cent in 2008 and by another 10 per cent (€2 billion) in 2009, arriving at €18.4 billion net advertising (ZAW 2010). Furthermore, the printed media are losing market shares. Newspapers' share of total advertising expenditures fell from 48.1 per cent in 1998 to 37 per cent

in 2008 (WARC 2008). The internet share has been rising – from a 0.2 per cent share in 1998 to 15 per cent in 2008 (WARC 2008). Projections show that if the current trends in the ad market, reader market and in newspapers' cost structure continue unchanged, the German newspaper industry will accumulate a deficit of more than €2 billion by the year 2018 (Kollo 2010: 12). Doing nothing is thus not an option. The German newspaper press may still be in a relatively comfortable position today but the existing business model is clearly threatened in the long term.

Pressure 3: management trends and the special role of profit expectations

Printed newspapers are less profitable than before. This is not necessarily a problem given that profit margins of more than 10 per cent used to be the norm in the German press and publishers believing in public service might be able to tolerate a few percentage points less. Also, large publishing houses with cross-media platforms like Springer and Bertelsmann compensate losses of their daily newspapers with gains in other segments of their portfolio. Falling profits may seem less tolerable for those publishers who are predominantly interested in high profits. It is obvious that, with the change from the founders' generation to their heirs, the commercial logic has become more dominant in many publishing houses. Newspapers long in family hands have been sold to investors who seem to be in the business only for the money. Some of the recent investors in the German media market based their acquisitions on debt which they were no longer able to service in times of economic crisis (Riesterer and Wittrock 2009). Further cut-backs were the result. Therefore, not all current troubles can be blamed on the internet; some are the result of failed investment, management decisions and unrealistic profit expectations.

To briefly sum up the discussion so far: journalism in Germany is better financed and the daily press still in a stronger position than in some other countries. The regional press continues to be firmly embedded in their communities; subscription and home delivery systems are advanced. German audiences seem loyal to their traditional media. Taking all channels together, German media reach more people today than ever before. There are, however, pressures that will aggravate in the long term: the loss of a significant part of the younger audience for traditional media and the shrinking share of a stagnating advertising market. Profit margins from the golden age of the printed press will not return. Lower profits and losses due to years of economic crisis will turn into a problem for journalism if media managers insist on double-digit profit margins and if they continue to cut down the resources for producing quality journalism.

Media business responses: between cutting costs and embracing change

The set of possible business responses by media organisations to save accountability journalism comprise at least five options. The first two strategies are aimed at cutting costs: by slashing resources or restructuring editorial processes. A third response aims at winning audiences through new communication channels, modernised formats, or innovative contents. Two final response strategies rely on developing new business models that either complement or replace existing models. While some of these responses focus on reducing costs in order to compensate for declining revenues,

others focus on the challenge of winning younger audiences or on embracing the new possibilities of digital communication. The responses are separated for the purpose of analysis but are closely intertwined in practice.

Response 1: saving money by cutting back resources

During both downturns of the media economy in the last decade (one starting in 2001 and the other in 2008) the default response to diminished revenues was to cut costs. This affected administrative resources and the technical process of producing the newspaper but, more importantly for the quality of journalism, also the newsroom.

From 2000 to 2009 about 1,000 full-time journalists on German newspapers lost their jobs, reducing the total number from 15,300 to 14,300 (Keller 2009: 106). Longitudinal data on the journalistic workforce are available from a two-wave representative survey conducted in 1993 and 2005. It finds that, in spite of an expanding media landscape with growing online journalism, additional TV and radio stations, and new special-interest magazines, the overall number of full-time journalists in Germany shrank from 54,000 to 48,000 (Weischenberg *et al.* 2006). The decrease mostly concerned freelance journalists who are not as well protected by German employment laws as journalists on fixed contracts.

While not every job that is cut will affect the quality of the content, it is plausible to assume that the accumulated effect has implications for overall performance. The closure of local bureaux in regions that are not served by other papers reduces the accountability of local politicians. Therefore, the strategy of cutting down journalism will affect the working of democracy in some areas while it might indeed be compensated by more efficiency or new forms of journalism in other areas, as will be shown below.

Response 2: getting more efficient by restructuring journalism

The second approach to saving costs tries to avoid downsizing journalism. The aim is to become more efficient by restructuring the newsroom. The promises of synergies between different sections, departments, and editions have encouraged a trend towards integrated newsrooms (Brüggemann 2002). In order to streamline editorial processes, centralised newsrooms have been widely introduced, which also created new work profiles following closer the Anglo-Saxon model of a separation between editors and reporters (Esser 1998). Then, the gains in efficiency thanks to new structures are used to reduce costs (for example by laying off journalists) rather than reinvesting the freed resources into improving journalistic output.

Studies of the streamlining of the journalistic work process and how this affects the quality of the content are scarce and most rely on interviews with journalists rather than analysing the actual changes in content production and outcome. Journalists in the newly integrated newsrooms admit that the reforms enhanced the quality of their newspapers and also their job satisfaction, in spite of working longer hours under increased time pressures (Schneider 2009). On the other hand, there are fears about the superficiality of 'assembly line journalism' which is more concerned with formatting content for different outlets than with thorough investigation and thoughtful reflection (Neininger-Schwarz 2010).

The introduction of centralised news desks and new work profiles may enhance the efficiency of the product. If it goes hand in hand with scaling down the number

of regional offices and laying off journalists, it might also result in lower standards of accountability in the German media, but in the absence of broader empirical studies on the topic, it is too early to rush to conclusions about the democratic impact of the changing structures of many newsrooms in Germany.

Response 3: gaining audiences with new media outlets, formats, and contents

Newspaper managers have responded to the pressures of shrinking audiences, especially amongst the young, by giving their products a face-lift and upgrading their user value. This resulted in new formats and new contents. Virtually all German media outlets have pursued this strategy to some degree. Newspapers have been relaunched, with colour and pictures. Some have downsized the format to tabloid size and many have strengthened their web presence. Despite this, web features and interaction with users and citizen journalists are not fully embraced by German media organisations. This is especially true for the websites of daily newspapers. In 2007, only 3 per cent of the internet editions of German newspapers produced significant amounts of exclusive web content (Neuberger *et al.* 2009: 178). In 2009, fewer than half of German newspaper websites allowed users to comment on articles (Büffel and Schumacher 2010) – the most basic feature of integrating user-generated content. By the end of 2009, it was still the exception for German media outlets to offer an iPhone application. (This changed somewhat around the 2010 football World Cup.)

For quality online journalism, there is only one success story to be told: *Spiegel Online* is Germany's most lucrative and admired example of a traditional print medium going online and establishing a new brand. Following a strategy of an autonomous web edition with 60 journalists, it attracts 5.6 million unique visitors per month. There is little overlap between the regular online readers and those of the printed magazine *Der Spiegel*. *Spiegel Online* is the most frequently quoted German online outlet, an extremely influential agenda setter, and said to have been profitable since 2005. It is considered the best example in Germany of how new communication channels can win additional audiences for traditional media brands. It entail investment in the interactive potential of digital journalism and has also made the printed edition of *Der Spiegel* more relevant in a multi-channel environment.

Response 4: new or alternative business models

New sources of revenue are another way out of the quagmire faced by commercial media outlets. These revenues might stem from higher subscription prices, fees for online content, or cross-subsidies from other commercial activities such as selling books, DVDs, or educational travel. Apart from these new sources of income to complement the financial model of commercial media, there are a number of alternative models of media ownership which have a longstanding tradition in the German quality press.

As in other countries, fees for online news have not gained much traction in Germany, while higher subscription rates for newspapers have been successfully implemented and have compensated for some of the losses on the advertising side. Selling book series and DVDs as well as different types of promotional material (including bikes and coffee in the case of the Berlin-based *Tageszeitung*) has become commonplace among German publishing houses.

While these measures are not specific to the German case, the presence of a number of successful alternative ownership models might be interesting from a comparative perspective:

- The daily newspaper *Frankfurter Allgemeine Zeitung* (FAZ) is owned by the independent FAZIT-Foundation, a non-profit foundation aiming to promote science, research, and education.
- The weekly newsmagazine *Der Spiegel* is majority-owned by its employees who are the shareholders.
- The daily newspaper *Die Tageszeitung* (taz) is co-operative-owned and administrated by the workers' self-management.
- The leading news agency Deutsche Presse Agentur (dpa) is established as a limited liability company, jointly owned by German media organisations.

These alternative models of ownership may help ensure that the interest in short-term gains does not dominate over the interest in quality journalism and long-term success. They do not prevent newspapers from being forced to trim resources if advertising revenues or subscription rates go down but they guarantee that a genuine interest in journalism prevails over the commercial interest in return on invest. Profit margins close to zero might be tolerable for a foundation but not so for commercial investors.

Response 5: new media ventures complementing traditional journalism

If traditional media remain unable to adapt to the changing needs of the audience and the digital media environment, new ventures might help invigorate and complement traditional journalism. Blogs, newly founded not-for-profit organisations offering journalistic content and pro-am collaborations between journalists and citizens might be examples of these new ventures in the media market. In the German case, however, new outlets outside the traditional media universe have not yet really succeeded in gaining a substantial audience or more than episodic significance for public debates.

The *Netzeitung* was probably the most ambitious project to establish independent web journalism in Germany. Founded in 2000 as the first online-only newspaper in Germany (pure player), it survived several changes in ownership which mostly resulted in further budget cuts until in 2009 the last fourteen journalists were laid off in order to turn the 'newspaper' into an automated news portal. While the *Netzeitung* had some success in providing quality journalism on the web, it never really managed to establish itself as a brand that could compete with *Spiegel Online* or other web outlets of traditional news media.

While *Netzeitung* was mainly a failed attempt at making profits with web journalism, a number of blogs have gained some relevance for local or special interest publics. Germany's best known blog, *Bildblog*, was founded in 2004 and specialises in media critique. It provides a daily commentary on the shortcomings of the tabloid *Bild*. In 2009 the concept was expanded into a more general media-watch blog that

goes beyond the missteps of *Bild*. Another much-observed blog is *Wir-in-NRW*, which focuses on critical coverage of local and regional politics in the state of North-Rhine-Westphalia. Together with other local blogs like *Ruhrbarone* they pick up important stories neglected by the dominant regional newspaper WAZ which laid off 300 out of its 900 journalists in 2009.

In order to gain nation-wide significance these blogs depend, however, on the traditional news media to take up their stories. Compared to the US, the German media landscape has not created new players comparable in reach to, for example, the *Huffington Post*. One reason for this is the still relatively high credibility of established media brands. These traditional news organisations launched extensive and professional online platforms early on, leaving little room in the German web sphere for alternative outlets. New players only have a chance if they find manifest voids not filled by traditional media.

In sum, our review finds that all five business responses are embraced to some extent but the smaller scope of the crisis and more stable market structures have put less pressure on publishers to invest in innovative forms of journalism. The current challenges have nevertheless triggered a broader debate in media and policy circles about how to improve the general framework conditions of the German press so that it can grow out of the current difficulties stronger and fitter.

Media policy responses

The expectation that the German government has an institutional responsibility for creating framework conditions that allow the press to thrive and fulfil its functions for democracy follows from Article 5 of the German constitution (*Grundgesetz*) which states that 'Freedom of the press and freedom of reporting by radio and television are guaranteed'. Of the many possible policy responses some will never be adopted (even if considered elsewhere) while others are already being implemented, as the following overview shows.

Response 1: direct state aid

Direct state aid or financial emergence measures like that employed in France ('États Généraux de Presse') or discussed in the USA ('Newspaper Revitalisation Act') are considered out of the question by the German government and by the newspaper publishers' associations. Such measures, they say, would violate the sacred principle of separating government and press demanded by the constitution. It is worth noting that neither the local press nor the high-quality national press has requested any kind of financial assistance. Another idea that has been flat-out rejected by both government and big publishers is that of a public service press fund. Such a fund – financed by a public fee to support newspapers based on the quality of their content and their contribution to a democratic public sphere – was proposed by German philosopher Jürgen Habermas in 2007. It is a renewal of an idea that was first proposed in the 1970s. As in the past, the idea finds few backers today.¹ Critics say that independent newspapers cannot be regulated by public law.

¹ There are more proposals that have been floating around without a serious chance of getting adopted, such as the Green Party's idea of a 'cultural flat rate' tax on broadband subscriptions, the proceeds of which would be used to underwrite quality content.

Response 2: indirect state aid

Indirect state aid refers, for example, to reduced postal rates or preferred tax treatment for the newspaper industry. The German Newspaper Publisher Association (BDZV) demanded in 2009 a further reduction in VAT rate for press products from the current rate of 7 per cent. In 2010 the BDZV softened its stance by demanding that this rate should at least not be increased.

Other indirect state support measures, like funds to improve local journalism or subsidise new online news ventures, or funds to help media organisations modernise their technological equipment and teach their journalists multimedia skills, are not on the policy agenda.

A final issue of indirect state aid is related to Germany's public service broadcasting system. The main source of funding for ARD and ZDF is a broadcast fee (constituting 85 per cent of the revenue), complemented by income from advertising and sponsorship (5 per cent) and other income such as co-productions (10 per cent).² The use of broadcast fee revenue to subsidise 'press-like texts' on the websites of ARD and ZDF was ruled 'illegal state aid' by the European Commission in 2006. This resulted in a new law which – in compliance with EU regulations – imposes stricter conditions on German public service broadcasters with regard to using public funding for online activities (see below).

Response 3: reforming legal framework conditions to improve competitiveness and revenue structures

Media policy responses in Germany focus less on granting state aid and more on improving general framework conditions for the press. Government politicians have been receptive to the demands of the German Newspaper Publishers Association to make changes to the Act against Restraints of Competition (*Gesetz gegen Wettbewerbsbeschränkungen*), the Media Merger and Acquisitions Act (*Pressefusionsgesetz*), Copyright Law (*Urheberrechtsgesetz*), and related intellectual property rights. Publishers argue that in a converged context some old rules have become outdated and some new ones have become necessary. The following policy changes are currently debated.

- Lift restrictions on mergers between newspapers in neighbouring markets if they do not compete for the same readers.
- Lift the threshold value from currently €25 million to €100 million for mergers between media companies that can go ahead without going through an investigation and approval process by the Federal Cartel Office.
- Lift restrictions on cross-media acquisitions, enabling newspapers to cooperate actively with local or regional radio and television.

² As institutions under public law, ARD and ZDF are state-owned but independent of government control. The broadcasting fee is calculated by an independent commission (the KEF) and then approved of by the German parliament. Every citizen who owns a receiving device is required to register it with a fee collection centre (the GEZ) set up and run by the public broadcasters. PSB's independence from politics is not all-encompassing. For example, all major parties are represented in the supervising broadcast councils of both ARD and ZDF. This has sometimes led to politicized hiring decisions for key journalistic personnel.

- Lift restrictions on joint operating agreements entered into by two or more newspapers in which the print facilities or distribution operations are merged, although each business retains its status as a separate entity in terms of profits and individual mission.

Of special importance to German newspaper publishers is government support in helping them protect their online news content from what they consider ‘unlawful use’ by search engines, news aggregators, and other commercial operators without consent or compensation. The German Minister of Justice supports the introduction of a new so-called neighbouring right (‘Leistungsschutzrecht’) that would give content providers more control over their material. In spring 2010 publisher associations and journalist unions were invited to draft legislation that would protect the intellectual creation of value by authors and publishers more effectively. The draft proposes a right similar to protections that already exist for music publishers and other content owners. With the adoption of two new paragraphs in the German Copyright Law (paragraphs 87f and 87g, *Urheberrechtsgesetz*), web aggregators like Google News would be required to compensate content providers for any commercial use of published material online. This would be done against payment of a licence fee to a special collecting agency. Several such agencies in charge of gathering and distributing royalty fees do exist already in Germany (like VG Wort) and could be used for this purpose. Private, non-commercial use of news articles would remain unrestricted and not fall under this law. A core goal would be to secure revenue for news reporting online. While this draft law has already been criticised by news aggregators and free-internet advocates and still has many legal loopholes to fill, the German government has made it clear that it intends to act – not only at the national but also the European level where the EC Copyright Directive would need to be adapted too. The conflict between search engines, news aggregators, and publishers continues to brew, but the real threat of legal action may bring them to the negotiating table.

Response 4: curtailing the privileged position of public service broadcasters

German government politicians have also responded positively to revising the Interstate Broadcasting Treaty (*Rundfunkstaatsvertrag*) which regulates the funding system and the guidelines for online activities and advertising on public service television channels. One proposal is to further restrict online activities by public broadcasters. The private broadcasters are concerned about distortion of competition and ‘press-like’ content funded by broadcast fees, the demand for which could also be met by the commercial providers. According to a 2008 revision of Germany’s Interstate Broadcasting Treaty – made necessary after intervention by the European Commission – the main public broadcasters ARD and ZDF are already required to undertake a three-step test with respect to their online offerings to check whether there is indeed ‘public value’ in any planned new-media service, and to what extent these services may unnecessarily damage the commercial offerings by private media companies (*Drei-Stufen-Tests fuer Telemedien der öffentlich-rechtlichen Rundfunkanstalten*).³ Furthermore, the German

³ This three-step test (loosely comparable to the Public Value Test in Great Britain) must provide evidence that the added value of a proposed new media offering contributes to the public service; must involve consultation of interested parties and commercial competitors; and must receive approval by the governing broadcasting councils of the public channels and by a round of independent experts.

Culture Secretary and other politicians complained in spring 2010 that elaborate online and mobile offerings by public broadcasters (like iPhone apps for news clips) cause unfair competition to commercial news entities and pose a threat to Germany's diverse newspaper press. All these details need to be decided on soon since the next revision of the Interstate Broadcasting Treaty will take effect on 1 January 2013.

Implications for democracy

For many observers, the biggest enemy of a free and democratic press is not the government or the state but managers and market conditions of the media world itself. High-profile newspaper journalists and unions have recently been warning of deteriorating working conditions and fewer resources to carry out the core function of news journalism: independent reporting that provides reliable information, in-depth investigation and thorough analysis that can help create an informed and engaged citizenry (Prantl 2009). This is close to what Downie and Schudson (2009) have called 'accountability journalism'. They link it to the watchdog function of the press and define it as 'reporting that holds government officials accountable to the legal and moral standards of public service and keeps business and professional leaders accountable to society's expectations of integrity and fairness' (Downie and Schudson 2009: 9). Accountability journalism in Germany grew to healthy levels in the 1960s and 1970s and has stayed stable until today without grave disruptions or existential threats. With regard to the current situation we conclude that Germany suffers neither from a general media crisis nor from a crisis of democracy. At most it suffers from a newspaper publishing crisis. This, however, is at least partly a self-inflicted crisis. The current situation is best described as a 'strategic crisis for newspaper publishers'. This strategic crisis reveals that a substantial part of the German press industry has not been capable, or willing, to innovate their publishing model in time (Jarren 2009).

There is definitely no crisis of democracy because never in its history have the citizens of Germany been informed so fully and in such a cost-effective fashion by such a diverse range of national and international sources. Many German newspapers reach more readers than ever before when online and offline audiences are combined. The public service broadcasting system provides a comprehensive and high-quality programme. However, one core media segment with respect to accountability journalism, namely the quality press, faces financial difficulty and painful readjustment to a multi-channel environment in which they may lose their once influential position as the dominant news providers. But they will cope better than many American papers because they are more firmly rooted in the regions, are an integral part of the German reading culture, and benefit from a widely shared consensus that there is a civic duty to keep informed. German papers maintain efficient home delivery operations and profit from relatively high subscription rates. They are much less exposed to investors and financial speculators and suffer less competition from talk radio and bloggers. They have not radically thinned out their national and international coverage, have not hopelessly lost the younger generation, and are still valued and appreciated by the opinion-leading elites and large parts of the general public. What the German newspaper press faces is a kind of classic structural adjustment not dissimilar to other 'traditional' industries like steel, coal, or agriculture which at some point all had to adapt to new contexts and conditions.

The second reason why Germany does not experience a crisis of democracy stems from the insight that democracy requires publishers or journalists only to the extent

that their presence is necessary to sustain an informed, unrestrained, and stimulated public sphere – wherever and however it is constituted. At many places in the World Wide Web we see a public sphere evolving without professional journalists. When looking for manifestations of rationality, deliberation, and orientation for citizens one could argue that online spaces like Wikipedia, open-source software projects, or ambitious blogs are indeed examples of rational, coordinated, and multi-filtered discourse whose end products can easily compete with the average newspaper article. But it is clear that the internet does not offer two crucial things: first, in-depth and costly investigations that hold powerful interests accountable and do not falter at the first hurdle; and second, a continued and reliable provision of independent reporting on current affairs that helps create an informed and engaged citizenry. To provide these services, journalism is needed, but not necessarily in the form of commercially driven enterprises. The German state acknowledges the importance of journalism for a democratic public sphere. This is why it maintains Europe's largest public service broadcasting system, financed with over €7 billion per year, and subjects it to a statutory remit that lists detailed programme expectations.

Nevertheless, it is obvious that traditional publishers and quality-oriented media organisations are under pressure and in need of advice about how to overcome their strategy crisis. Here we are not principally against the involvement of media regulators and policy initiatives *as long as* this involvement is clearly and securely aimed at supporting innovation, quality, and public service (see Jarren 2010). Fostering journalistic innovation and excellence may require intellectual and (indirect) material support; what this support should ideally look like is very hard to say. We do see that the German press, by and large, shows a clear commitment to quality journalism. And we also see many papers still standing strong. German publishers are extremely well organised and connected, and fight resolutely for more favourable framework conditions at all levels. This includes standing up to what they perceive as an over-extravagant online appetite of public broadcasters and global web aggregators. Yet some of their policy desires seem to us to go too far, especially with regard to public broadcasters. Before developing a larger-scheme solution, publishing houses would have to rethink their profit expectations and social responsibility. We conclude by saying that the current 'crisis' is less severe in Germany than in some other countries. It might still cause trouble for some papers and even lead to a moderate downsizing of the media landscape but this will do no significant harm to German democracy.

This brings us to the final question of how some of the publishers' media policy proposals discussed above should be evaluated from a democratic-normative perspective. First, let us note that policy proposals that are directed at extending copyright laws in order to protect publishers from the commercial use of published material online (Google News) or the non-commercial use of published material online ('file sharing piracy') run counter to the spirit of openness that characterises the web. These policy proposals have little value for the consumer or the health of democracy but offer substantial financial benefit for publishers who have trouble finding workable business models for the digital age. We conclude that a free democracy requires access to free and unlimited information, but we also acknowledge a need to ensure that there is a way to pay for the production of this content. This brings us to our second point. Policy proposals aimed at loosening anti-trust laws play into the hands of free-market advocates. Yet concentration of media power in the hands of a few is fundamentally at odds with basic democratic values. It can threaten diverse public discourse; it

can increase the likelihood of owners using their media power for political reasons; and it can make owners more interested in generating profit than providing quality journalism. On the other hand it is clear that the production of quality information is expensive, requires effort, time, devotion, and money – resources that very small enterprises cannot always provide. Therefore, large media companies are not problematic for democracy as such. They are problematic if they threaten the plurality of public debates and if they are exclusively guided by a logic of maximising profits at the cost of providing quality journalism. The risk of a commercial logic dominating the public interest is inherent in all commercial enterprises. Therefore, it would be detrimental to democracy to severely restrict the room for manoeuvre for public broadcasting, for example by drastically restricting its online activities. Strong public broadcasting and a strong commercial media market should live side by side in a stable media ecology in which media policy regulation sees its role as enabling and rewarding the provision of quality content.

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