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Colin Sparks

School of Media, Arts and Design

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The Contribution of Online Newspapers to the Public Sphere: A United Kingdom Case Study

Colin Sparks
Communication and Media Research Institute
University of Westminster

This article examines the online presence of the U.K. national daily newspaper press. The differences between the offline and online markets for the content of newspapers are examined and the performance of the 10 daily titles is compared in the 2 spheres. It is shown that the success in attracting audiences of the online editions does not reproduce the patterns of offline editions. In particular, the online sites of "quality" newspapers are much more successful than those of "tabloid" newspapers. The possible reasons for this are reviewed and it is concluded that the kinds of material normally found in quality newspapers are enhanced by their presentation in the new medium, whereas those found in tabloid newspapers are often provided better online by other specialist competitors. A typology of online newspapers is then proposed, constructed in terms of the relationship between offline and online titles and the implications of the different categories are considered. In conclusion it is noted that, although it might be possible to interpret the data to suggest that the development of online newspapers acts to enhance the public sphere, there are important factors that make an alternative conclusion more convincing. The kinds of material that are most successful online are those that address the concerns of the elite, and the online public sphere will embody the same sorts of exclusions that are present offline, but in a more extreme form.

Keywords: online newspapers, public sphere, quality press, tabloids

1. INTRODUCTION

By February 2002, there were about 5,000 newspapers with web presences (Editor and Publisher, 2002). In less than a decade, newspapers from around the world have flooded in to this new outlet. Despite the economic problems that their offline parents have experienced during the early years of the new century, and despite the very great difficulties they have almost all had in developing a viable business model, there is little sign of any large-scale retreat. There are numerous reports of staff and budget reductions, and of the rationalization of operations in an attempt to

Requests for reprints should be sent to Colin Sparks, Communication and Media Research Institute, University of Westminster, Harrow Campus, Watford Road, Northwick Park, Middlesex, HA1 3TP, England. E-mail: sparksc@wmin.ac.uk

save money, but as yet very few examples of outright closures. Despite the relatively short life of the online newspaper, there is today enough experience and information for us to attempt to make classifications of online newspaper to explore different aspects of their functioning.

As one might expect, with such a large number of titles, the nature of the online newspaper varies widely from example to example. This article discusses the nature of the relationship between offline newspapers and their online progeny with a view to understanding what modifications this new technology has introduced into one of the major functions of offline newspapers: that of providing news and opinion that acts as a central constituent of the public sphere. A typology of online newspapers is proposed, based on the nature of the content that they offer, and the relative success of these types is considered in relationship to the public sphere functions of the newspaper.

Faced with the enormous number of titles available, it is necessary to sample rather drastically if any detailed analysis is to be conducted. For this study, it was decided to use the ten titles that make up the national daily press market in Britain. Choosing this sample resulted in the analysis having some advantages and some disadvantages. The greatest strength of an analysis based on these papers is that it examines a distinct and bounded market whose basic characteristics in the offline world are extremely well understood (Sparks, 1999). The market is a very competitive one, and this has resulted in a high degree of product differentiation in the offline world. Within one single market place, it is possible to examine newspapers that are indisputably tabloid, as well as ones that more closely resemble the ideal type of the newspaper of record. Such a market allows us to explore the relationships between different kinds of public information and the social structure of a society in a way that is not possible in other cases where one or a very few titles are dominant, and where newspapers tend to super-serve elite groups. The main limitation, of course, is that taking newspapers from one country makes it difficult confidently to generalize the results around the world. In considering the implications of the findings reported here, I need to be careful that any claims I make are not simply the product of national peculiarities but genuinely reflect universal features of the subject under study. The absence of a comparative dimension, however, can also be considered a strength because all newspapers are operating with the same relationship to sociopolitical structures, and variations can therefore be attributed to differences between the media themselves rather than differences in their environment.

A second important observation that needs to be made about this study is that it was conducted during a period (the first half of 2002) when the majority of the online content of all of the newspapers under consideration was available for free. Since the study was completed, there have been attempts, notably by the *Financial Times*, to introduce a subscription model for much of their online content. The fact that the content available was generally free at the time of the study has the positive implication that I am able to examine customer preferences independent of pricing issues. There were no financial barriers to accessing any of the papers, and therefore I can give considerable weight to the assumption that online, people chose the sites they wished to visit primarily because of the content of those sites. I can thus get a very clear sense of what “works” online in editorial terms. On the other hand, as the *Financial Times* example shows, the provision of free content is unlikely to be a permanent feature of online newspapers. Eventually, the need to demonstrate continued economic efficiency will force more and more newspapers to attempt to charge for their content, or to reduce it drastically, or even to abandon their online presence all together.

Throughout this article, the term *public sphere*, or one of its close analogues, is employed. This concept is notoriously complex and contested, but it is not my purpose to offer any substantive contribution to resolving such difficulties. Rather, the term is here used in a relatively simple and direct way to direct our attention to the active process whereby the denizens of a society come to form their views about the political alternatives facing them. It is historically the case that newspapers have formed an important element both in the provision of information and as the site of opinion and debate about matters of public concern. In this article, I am more concerned with the ways in which the provision of information and opinion is altered by the shift online. In particular, I am concerned to investigate the extent to which patterns of social exclusion, which are known to render the offline newspaper an imperfect vehicle for a genuine public sphere, are modified by the existence of online editions. One major claim that has often been made for the Internet is that it is a mechanism that has the potential greatly to reinforce the public sphere, and I here provide some evidence as to whether that promise has so far been realized.

2. WHAT IS AN OFFLINE NEWSPAPER?

There is a strong tendency, particularly marked among elite journalists, to take a normative view of what a newspaper should be. Usually, the prescription is for a great deal of a particular kind of reporting (full, thorough, and objective reporting) of events involving political and economic life at home and abroad. This is a view shared by most accounts of the public sphere: newspapers that contain substantial accounts of contemporary social, political and economic events are contributors to the public sphere. An evidence-based account, on the other hand, suggests that the offline newspaper is polymorphous. A brief glance at the history of the newspaper, the simple comparison of contemporary newspapers in different countries, or even comparison between newspapers in one and the same country, demonstrates beyond all doubt that the constituents elements that go to make up "the newspaper" are very varied, and that they can be combined in different proportions depending on the market position of a particular title. I can illustrate this proposition by comparing two market-leading newspapers in the United Kingdom. The highly stratified national daily press market contains radically different artefacts under the single title of newspaper. In the down market segment, the market leader is *The Sun*. In the up market segment, the market leader is *The Daily Telegraph*. In all but the most extreme circumstances, these two titles will have contents that differ systematically in their appearance, their literary style and their content.

Following Hughes's classic study of *News and the Human Interest Story* (1940), I have elsewhere argued that it is a mistake to look at the contents of newspapers as a single type of writing making up a uniform category called "news." They can be better understood as "bundles" of different orders of discourse that are designed to appeal to distinct kinds of readers and advertisers, only one of which is the "hard news" of journalistic mythology (Sparks, 2000b, pp. 19–21). Different titles combine different kinds of discourse—politics, business, sport, scandal, and so on, in different proportions, to target different readers and thus attract different advertisers. The combinations are always provisional, and subject to revisions, many regular and frequent (e.g. more sports and less politics on a Monday morning), others periodic and rare (e.g. redesigns and re-launches), and some exceptional and unpredictable (e.g. in response to events like September 11, 2001).

Despite the provisional nature of these combinations, however, the main contours of the bundle are predictable over time. This relative stability is a necessary consequence of product differentiation. In most countries, a relatively narrow range of providers dominates the supply of news and, as is characteristic of such markets, price competition is comparatively rare, although product differentiation is commonplace. Once again, the stratified U.K. market provides an excellent example of this phenomenon. The five quality daily papers do exhibit some price differentiation, but they are much more clearly distinguished by different editorial policies, different kinds of features, and different political orientations.

If offline newspapers are bundles of different kinds of writing (and pictures etc.) that vary in composition from title to title in response to market conditions, then there is every reason to expect that the online newspaper will exhibit similar characteristics. It, too, will be a bundle of different discourses. Because the online market place for news has distinct characteristics, however, there is every reason to expect that the contours of the online newspaper will be different from that of any offline relatives.

One aim of this article is to look at the U.K. newspaper market to see what, if any, differences can be found between the bundles put together by offline and online newspapers. I did not expect to find that news in the narrow sense is a completely different category online than it is offline: wars, disasters and so on are likely to be found as prominently online as offline. Neither did I expect to find that the technical differences between online and offline publications, notably the possibility of rolling deadlines online, are the key markers of difference. What I was concerned with was the nature of the elements that go to make up the different outlets, and the different ways in which they had been combined. One may hypothesize that, online, particular discourses will have a different relative importance than that which is found in the parent title offline.

3. THE PECULIARITIES OF THE ONLINE NEWS MARKET

There is no single market for news, even if one defines it in the narrowest and most orthodox terms. There has, for at least 150 years, been a clear distinction between the wholesale (news agency) and the retail (newspaper, broadcasting) markets, for example. I would not expect the online news market to be identical to that of its offline relative, and in fact it is clearly distinguished by five well-known factors. As exemplified in the U.K. market, they are:

1. The geographical boundaries that limit the offline press are not present online. Competition between titles is thus not constrained in the same way. Offline,

The Wall Street Journal (*WSJ*) and the *Financial Times* (*FT*) are only marginal competitors in their home markets, through their international editions. The *WSJ* dominate the U.S. business market and the *FT* dominates the British (and European) business market. Online, however, they confront each other directly in a space that has no defined geographical "home market" for either of them to dominate. Of course, it is likely that the brand legacy of the offline editions will be carried over into online competition. One would expect more traffic to the *WSJ* than the *FT* from inside the United States, and the reverse from inside Europe, but insofar as the competition is genuinely online, the potential user is free to choose on grounds of preference rather than the geographical accident of their location.

2. The formal and social boundaries that define discrete media in the offline world are eroded online. Offline, newspapers can be clearly distinguished from other media forms, notably from broadcasting, which uses a completely different delivery technology and is, historically, subject to radically different regulatory conditions, and whose products are consumed at different times and in different circumstances. Online, newspapers face competition not only from new electronic news purveyors but also from the online avatars of offline media that do not directly compete with them there. The range of these new threats is considerable: from the news services carried on portals and search engines through the retail outlets of traditional news wholesalers (Reuters and the Press Association's "Ananova" avatar) to the online sites of broadcasters like the BBC. Online, all of these are delivered through exactly the same technology as the newspaper, and compete directly for time and attention.

3. The social profile of the potential online audience for news is markedly different from that of offline newspapers. Despite the increasing diffusion of the technology, the online audience in the United Kingdom remains relatively younger, more up market and better educated than the population as a whole (National Statistics, 2002, p. 3). In the offline world, the audience for newspapers is generally thought to be ageing, although the online audience is generally young. Offline, different kinds of newspapers tend to attract readers from different social groups. In the British case, the "social home" of the quality press is in the upper social grades, while the popular press finds its main audience in the lower grades (Sparks, 1999, pp. 50–54). The persistence of the digital divide means that the technologies of access are more often available at home to readers of the quality press than to those of the popular press. What is more, anecdotal reports from the industry suggest that online news use predominantly takes place during working hours, and it is therefore likely that those in nonroutine professional and white-collar occupations will be more able to access news sites from work than those in closely-supervised white-collar and blue-collar jobs. It is pretty easy for a professor to visit a news site during the working day; it is much less easy if you earn your living serving in MacDonald's.

4. The revenue raising opportunities are different between the offline and online market places. As everyone now knows, it is very hard indeed to make charges for anything but premium content stick in the online environment. As everyone also now knows, the market for nonclassified advertising is currently in sharp decline, and this general problem is reproduced online in an even more extreme fashion. Two of the major sources of revenue for the offline press are thus extremely problematic in the online environment. For the time being, at least, the offline oper-

ations are the place in which media concerns earn their money, and from a commercial point of view the online newspaper is dependent on its offline parent for its survival. It is therefore unlikely to be in a position to dictate the shape of the newsgathering apparatus of the organization as a whole, and what is available as news will therefore, in large measure at least, be determined by the priorities of the offline version.

5. The virtuous circle that bound advertising and editorial content indissolubly together in the offline world has not been reproduced in the online environment (Sparks, 2000a, pp. 274–81). The searchability of the web has meant that it is possible for new and much more direct relationships between advertiser and audience to be constructed online that were not possible offline. There are numerous examples of online advertising sites that carry classified advertising without the benefit of any editorial content whatsoever. One well-known U.K. example is http://www.jobs.ac.uk This site, owned by Universities, carries advertisements for jobs in the higher education sector. (At 8 January 2003, it listed 20 posts in the field of media studies and journalism, in case you are interested.) There is no offline equivalent. Online, it competes with the sites of the *Guardian* (http://www.guardian.co.uk) and the *Times Higher Education Supplement* (http://www.thesis.co.uk) for exactly the same kind of advertising.

I may summarize these five points by saying that: The online news market has different boundaries from the offline market; it has a different competitive structure; it displays a different social profile; and, although it already poses a threat to the finances of offline media, it has not yet developed an autonomous commercial structure of its own.

Overall, it is clearly the case that the online market is not, up until very recently at least, a "real" market in the sense that established products were competing one with another for the attention and money of a defined audience. Because the technology is still very new, and because the initial period of growth took place in the boom conditions of the late 1990s, there was a strong air of experimentation about all online ventures. The vast majority of these news sites were and are commercial ventures, and in the long term they need to make a return on investment to survive, but when advertising revenues in the offline world were so buoyant, solving that problem could be postponed. In the early years, many companies believed that it was important to develop an online presence even in the absence of any serious short-term revenue potential, and because of the general economic climate, and the associated boom in advertising, were able to do so more or less lavishly. Although people certainly were not averse to making money, and although industry conferences were invariably full of pronouncements that there would have to be a return on investment in the near future, the day of reckoning, when the value of a web presence was subjected to internal financial scrutiny, was always postponed.

The current recession should, in principle, change all of that. The Web is no longer regarded as a miraculous land in which the normal laws of capitalism do not apply, and closure and merger in the dotcom world is as common as over-subscribed IPOs were a couple of years ago. There have been some spectacular failures among very large media companies that have led to fire sales of assets in an effort to balance the books. Today, advertising revenues decline, pagination is reduced, and journalists are made redundant. In such circumstance, one would expect to find a swathe of closures in the news business, online even more than offline. In those sites that survive, I would also expect to find a renewed urgency in the search for viable business strategies, a pruning of costs, and an exploration of various revenue-maximizing models. So far, however, the overall international picture is that there has been no dramatic slump in the number of news sites. Certainly, there are reports of redundancies and cost-cutting, and efforts to raise revenue have become increasingly apparent, but wholesale closure is not yet a reality. The summary conclusion one can draw about the overall picture for online newspapers is that they are going through a period in which they are increasingly seen as an expensive luxury, and in which intensive efforts are being made to raise revenue and control costs, but that we have not yet reached the point where many companies are abandoning their efforts for economic reasons.

4. THE U.K. NATIONAL DAILY PRESS MARKET

All of the 10 newspapers that constitute the U.K. daily national press have online presences. As can be seen in Table 1, however, the site traffic for their online editions appears to bear no relationship to their offline readership.[1] So, for example, the *Sun* (http://www.thesun.co.uk/), which offline is by far the largest circulation daily newspaper in the United Kingdom, has an online audience around half the size of that of the *Financial Times* (http://www.ft.com/), whose offline readership is an order of magnitude smaller. Part of this difference, without question, is a result of the social gradient in the distribution of Internet access in the United Kingdom that I noted above. The readership of the *Sun* is centered in Social Grades C2 and D, and these are the groups with lower than average rates of Internet access. The *Financial Times*, in contrast, is widely read by Social Grades A and B, who tend to have access not only at home but also at work.

It is questionable, however, whether differential access as a function of demographic realities is enough to explain these sharply contrasting rates of usage. Rather, these figures are so extremely divergent that they strongly suggest that the kinds of information that make up the bundle of the *Financial Times*, and for that matter the other broadsheet titles, provide a better basis for translation online than do the kinds of information that make up the bundle of the *Sun*, or for that matter the other tabloid titles. It seems likely that the activity of offline newspaper reading is different from that of "reading" online newspapers, and that the propensity toward this latter kind of activity is socially structured, probably along lines of social class and educational level, in ways that are much more pronounced than is the case offline. Some of the things that attract the readers to the offline tabloid newspaper do not translate very well to the online experience, for example the small,

[1] The online figures are from the Audit Bureau of Circulation's electronic survey (ABCE) and the offline figures are from the National Readership Survey (NRS). It is therefore reasonable to say that they are trustworthy records of what they set out to measure. In the case of the ABCE figures, however, the reporting is very erratic indeed, and some important titles do not subscribe to this service, so it has not been possible to construct a complete picture.

Table 1
Offline Readership/Online Unique Visitors for the U.K. National Daily Press in 2001

Title	*Readership*[a]	*Users*	*Users/ Readership*	*Page Impressions*	*Dates of Survey*[b]
Star	1,460,000	—		—	—
Sun	9,591,000	1,253,932	0.13	17,251,932	October
Mirror	7,306,000	—		—	—
Express	2,235,000	—		—	—
Daily Mail	5,564,000	—		—	—
Independent	571,000	—		—	—
Guardian	1,024,000	2,416,634	2.36	30,246,943	March
Guardian	1,024,000			51,361,656	October
Times	1,575,000	2,690,186	1.71	29,299,560	October
Daily Telegraph	2,235,000	3,417,112	1.53	33,981,168	September
Financial Times	598,000	2,426,156	4.06	43,450.852	September
BBC	—	13,159,434	—	321,074,138	March

[a]Source: National Readership Survey, figures relate to April to March 2001. [b]Source: Audit Bureau of Circulation (electronic) figures for 2001 (highly incomplete).

portable and easily accessible physical envelope, while others are provided in a better form by other sites.

One example of this is the "soft porn" material that is such a pronounced feature of the *Sun*. Page 3 is a legendary aspect of the appeal of the offline *Sun* and it is an important contributor to the sense of "fun" that the newspaper seeks to instill, and which the very limited amount of scholarly research that has been done on this very important topic suggests is in fact one of the main appeals of the paper (Holland, 1983; Johansson, 2002; Pureshouse, 1992). Online, *News International* has tried to separate out and emphasize this feature of the paper, giving it its own linked site with its own revenue generating mechanism (which I leave the readers of this paper to explore for themselves; http://www.page3.com/). The problem is, of course, that pornographic material, a lot of it very much harder core than the *Sun* can possibly provide, is easily available elsewhere on the net. Neither are the relatively solitary circumstances of Internet access conducive to the shared forms of sociality that constitute fun for *Sun* readers. Similar problems dog other major aspects of the material that is so prominent in the offline versions of this and other tabloid newspapers. Online, it is possible to find dedicated sports coverage, notably of football (soccer), extensive material on the stars of the entertainment industries, and all of the other distinctive content of this kind of title, in many places other than the web sites of the newspapers. The simple fact is that a lot of the material that goes to make the tabloid press bundle so attractive to such a vast readership in the offline world either does not translate well into an online form, or else is produced in a very much more attractive way by specialists who have found the web an ideal medium. Offline, the elements can be bundled together as a commercially viable operation that is enormously attractive to large numbers of readers. Online, they can be unbundled and provided by companies that have no relationship to the traditional newspaper business, and do not provide even the vestiges of the kind of material that helps constitute the public sphere.

By contrast, the *Financial Times* has found in the characteristics of the web the opportunity to develop aspects of its content that are restricted by its printed form. One very good example of this is the provision of business information, which forms a central part of the appeal of the newspaper to its offline readers, and lies at the core of its recent move toward a subscription model. The online edition is able to provide much more detailed, timely and interactive information on all kinds of business data. For example, it is possible to produce charts of the share price of a selected company, on a selected stock exchange, with parameters and comparators specified by the user. So, for example, I can quite easily find the quarterly share price movements of News Corporation on the New York Stock Exchange over the last 5 years, and compare it with both the overall movement of share prices and the average for the media industry. Alternatively, I can do the same for the last day's trading, at 1-min intervals, or various combinations in between. This kind of data has many potential uses for different kinds of research, commercial and academic, and the customers who purchase only the print edition of the *Financial Times* cannot generate it from that resource alone.

This provision of specialized information that would not be available without web technology is particularly marked in the case of the *Financial Times*, but it is not specific to the business sector. Another case in point is the *Guardian*, a quality broadsheet and second most successful of the websites in Table 1. This has a particularly strong readership among teachers and lecturers, not to mention their potential students. The *Guardian* has developed a number of tools that enable one to build profiles of different institutions or fields. For example, if one searches for the ratings for Media, Journalism and Communication, one finds the University of Westminster at the top of that table, at least according to this newspaper (http://education.guardian.co.uk/higher/unitable/0,11985,723569,00.html?index=2).[2]

What these examples demonstrate is that the broadsheet press has in its offline form content that can easily be developed and improved through tools specific to the Internet. It is possible to gather together data that offline is scattered in different publications, produced at different times and in different places, and offer ways of manipulating it to produce results perceived as more relevant by the user. Prior to the development of the online newspaper, these functions were either impossible to carry out or were restricted to proprietary systems with limited and expensive access. In this, the broadsheet press are in exactly the reverse situation to that of the tabloid press: The Internet is a medium that allows the former to develop its strengths, but it is a medium that weakens the appeal of the latter. The bundle that makes up the offline broadsheet newspaper transfers better online than does that of the tabloid.

The broadsheet newspaper also has an offline readership that has concerns and interests that can be better met by the enhanced services than it is possible to provide online. The kinds of business information cited above are clearly of considerable importance to the readers of the *Financial Times*, so they are likely to respond positively to the more powerful tools available online. By contrast, it is difficult to see precisely which elements of the content provided offline by the popular press

[2]In fairness, I should also add that another tool allows one to find the research ratings of each department, and here Westminster is regrettably not quite the top institution in media studies.

could form the basis of an even more compelling online version that would attract readers on a regular basis. In the one case that might fit, that of pornography, there is certainly an audience for this material online. Experience has shown, however, that newspapers that cross certain boundaries in their use of this kind of material in their offline editions experience negative reactions from both readers and advertisers. Given the nature of the competition online, it is unlikely that an online edition of a newspaper could carry compelling material of this kind without severe reputation damage.

The second major observation that is apparent from the data in Table 1 is the massive presence of the BBC (http://www.bbc.co.uk) in the online world. As its March 2001 figures show, while the *Guardian* can legitimately bill itself as Britain's most visited online newspaper, on comparable data the BBC is by far the most visited content site.[3] News (in 43 languages besides English) is only one part of the vast BBC operation.[4] The cluster of sites seems to have the ambition to cover all of human life, from the cradle to the grave. The richness of this offering is obviously a major reason why it scores so highly, but of course the strength of the offline brand of the BBC, particularly in news and current affairs, is an important contributing factor. The strength of the BBC is a very clear example of the way in which the development of the Internet changes the nature of the market place. Offline, the BBC is not in competition with any newspaper; online, it is in competition with all of them.[5] Leaving aside the business implications of all of this, I can note at this point that the dominance of the BBC is a demonstration that it is the large and rich sites that come to dominate the online world. The ability to produce a very wide range of material—to have a rich and complex bundle of content as well as classical news—is the condition for attracting visitors to your site, let alone keeping them there once they arrive or bringing them back again time after time.

5. TOWARD A TYPOLOGY OF ONLINE NEWSPAPERS

The typology of offline national daily newspapers in Britain is well-established: depending on nuances of interpretation it is tabloid/broadsheet or tabloid/mid-market/broadsheet. It is possible for some purposes to make finer distinctions within this, but for common usage the three-category model is more than adequate.[6] No such accepted typology yet exists for online newspapers. Table 2 is

[3]Search engines and portals record larger figures and in ignoring them I am neglecting an important source of online news. None of the online offerings of the other commercial TV companies are serious competitors. The only other broadcaster that has developed a major Internet presence is Channel 4, but that is not really a competitor in the online news field.

[4]It might be objected that it is unfair to take the usage of the BBC site as a whole as a comparator: Because it is newspapers I am discussing, it would be a better measure to consider the BBC online news figures. As I have argued above, however, "news" in the orthodox and traditional sense, is only part of what a newspaper is about, because the texts, both online and offline, are bundles of material of different kinds. If one were to take only the BBC online news figures, then one would have to find some way of factoring out only the "news" pages of online newspapers, and ignoring those visitors who go only to the sports material, for example, because that is classified differently by the BBC.

[5]Not to mention being in competition with consumer magazines and educational publishers.

[6]My own five-category classification is available in Sparks (2000b).

Table 2
Towards a Content Typology of U.K. National News Sites

Category	*Description*	*Examples*
Type 0	No web site	No example
Type 1	Web site with much less content than the offline edition, much of it similar	*Daily Express*
Type 2	Web site with about the same amount of content as the offline edition, much of it similar	*Daily Mirror*
Type 3	Web site with slightly more content than the online edition, much of it similar	*Daily Telegraph*
Type 4	Web site with very much more content than the offline edition, including all or most of the offline material	*Guardian*
Type 5	Web site with differently configured content, some of it quite distinct from the offline material	*Daily Mail*
Type 6	Web site entirely with entirely different content, entirely distinct from the offline material	No example

an attempt to provide some of the evidence on which such a typology could be built up.[7] The entries into the various categories, compiled from a survey in early March 2002, are presented here with some hesitation. Far more than in orthodox content analysis, they represent subjective judgments on the part of the researcher and it is doubtful whether a replication would achieve identical results. On the other hand, they do provide some sort of guide to the nature of the different sites, and it is possible on this basis to suggest some categories that might make up a classification.

From the "newspaper" point of view, the first column is the most important. Here the first thing to note is the absence of what is here called Type 0. None of the U.K. national newspapers have entirely withdrawn from the web. On the other hand, the two Northern and Shell titles, the *Daily Star* and the *Daily Express* are Type 1 sites, providing much less than is present in the offline editions. Such Type 1 sites represent only vestigial web presences whose purpose is unclear, and whose long-term health must be in doubt. Most of the other titles are distinguished by the varying degrees to which they have put their offline material online, and whether they have added substantially to it with web-specific material. Clearly, the lesson from the current U.K. market it that, in audience terms at least, Type 4 sites are by far the most successful. The *Guardian* site, and that of the BBC, which also falls into this category, are, as has been seen above, the two sites that have developed web-specific content to the highest degree and the ones that have the largest numbers of visitors.

The Type 5 site, however, is perhaps the most interesting. The sole example of this is the *Daily Mail*. This is a mid-market offline product that is distinguished by being one of the most successful U.K. newspapers, as measured by a steady circulation growth. It is also the one with the highest proportion of female readers: just over 50% of its readers are women, compared with 45% for the *Guardian*, 46% for

[7]It is noted that this is a classification that orders newspaper sites relative to their offline parents, and not relative to each other. In choosing this measure, I am attempting to recognize the real primacy of the offline newspaper, derived from its superior economic position, in determining the content of the online version.

the *Sun* and about 47% for the market as a whole. The home page on the *Mail's* site (http://www.dailymail.co.uk) is not the offline newspaper's main news agenda, but that of its "women's section" *Femail* (http://www.femail.co.uk), to which it offers a direct link. The page also offers links to a number of other Associated Newspapers properties, dealing with travel, personal finance, and so on. What it notably does not offer is any link to the news of the *Mail*, although it does offer a link to *This is London* (http://www.thisislondon.co.uk), which does have some news, but is a local site heavily inflected toward the interests of the capital.

This site is one in which the transfer online has been conducted quite ruthlessly, without any sentimentality toward the content of the traditional newspapers. The owners have clearly asked themselves what are the distinctive features of their brand that would work best online, taken them, and only them, and built a new product around them that is significantly different from the offline product. This is the construction of a new and different online "bundle" from the one that has been so markedly successful in the offline world.

The second distinctive feature of this site is that it is the one that most prominently foregrounds the possibilities of transactions, guiding the viewer to shopping directly from the first frame.[8] The shop (http://www.mailshop.co.uk) carries the *Daily Mail* branding and is specifically presented as confidence-worthy due to its direct association with the newspaper. On the other hand, it does not carry editorial copy associated with the products for sale, so there is no sense in which the journalistic integrity (if any) of the brand is being utilized to drive sales.

The other extremely interesting type is the one that is not found in the U.K. national press: the site that represents a complete transformation between offline and online. If, in the case of Type 5 sites, the link between the two is weakened, and the online site is beginning to develop a distinct identity and dynamic, in the case of the Type 6 site the link has been broken and the online identity obeys its own logic in terms of content.

This kind of site is not a figment of my theoretical imaginings. On the contrary, it already exists in a very developed form in the U.K. local press market. Fear of losing classified advertising business to nonnewspaper online operations has forced an unprecedented degree of collaboration between the major chains that dominate this sector of the industry. They have come together to construct a national site with the odd name "Fish4" (http://www.fish4.co.uk) that handles their collective classified advertising effort. The site presents a home page completely devoid of editorial content as traditionally understood in the newspaper, and it is dominated by three categories of search tool, each dedicated to one of the pillars of classified advertising: jobs, cars, houses. The unique technology of the web, its openness to

[8]It has to be said that the careful gender positioning collapses on entering the shopping zone. On March 23, 2002, the first featured advertisement had as its text the following: "If you need to blast up concrete paths or bore through masonry like a knife through butter, the ZIC–26 800-watt 3-in-1 electric rotary hammer drill is the tool for you. Fully GS/TUV and CE approved for quality and safety, the ZIC–26 comes complete with 20mm wide masonry chisel bit and 195mm long masonry spike for concrete busting, plus 3 masonry drill bits (8mm diameter, 10mm diameter and 12mm diameter). The drill has a full-load impact rate of 3150/min, can be used with or without hammer action, plus we've included a standard 13mm chuck for use with standard metal, wood and masonry drill bits. This superb workman's tool is on offer for the exceptional price of just £99 saving a massive £100 on the MRRP." A toy for the boys, for sure.

searchability, is here exploited to deliver direct access to advertisements and their associated services. The site does deliver nonadvertising material, but this does not approximate to the traditional content even of the local newspaper. For example, a search on the housing section of the site leads to a list of properties, for each of which it is possible to access a postal code (Zip code) based neighborhood information page and an environmental report. The potential purchaser can find out a great amount of information about the characteristics of the area in which the house is located, identify local service providers that can facilitate a purchase, get mortgage quotations, and so on. The newspapers that support this service retain their individual and group web presences, which contain much of the same sort of editorial material that one would expect to find in a local newspaper, and are accessible from the main site.[9] These are, I would say, Type 3 newspaper sites inflected in a local direction. Even on these sites, however, the links for purchasing houses or cars, and for job hunting take one directly to the Fish4 site.

Type 6 sites represent one possible development of online media in which there is a complete disassociation between the kinds of editorial content that were traditionally present in the newspaper, and were, however imperfectly, an important constituent element in the public sphere, and the main business of the company that produces them, namely selling classified advertisements. This type is a polar opposite of the Type 4 sites. Both use the special features of web technology to develop aspects of the "bundle" that is present in the offline newspaper, and to give it new depth and functionality. Type 4 does it for the editorial content of a particular kind of newspaper. Type 6 does it for the advertising content of another kind of paper.

5. CONCLUSIONS

An exploratory study such as this inevitably raises more questions than it resolves. I would enter the following caveats about the findings above before proceeding to any summary:

1. The research methods needed to understand online content are very far from robust. Offline content has been measured for more than 100 years, and I have some idea of the (very simple) rules needed to do it more or less reliably. We have no such guidelines for online content analysis. Content changes, disappears, expands and contracts without leaving any physical record, unless one happens by chance to have been saving the pages in question. The findings reported here cannot make any firm claims to reliability, simply because there is no clear sense of what it is I should be measuring and no obvious way in which they could today be replicated. It is much less clear in the online world exactly what might constitute the basic units of analysis than it is offline. The boundaries of each text are much more fluid, the boundaries of the newspaper itself are often uncertain. As a consequence, I risk falling back into subjective judgments as to what to include and exclude, and it is entirely possible that another investigator with different prejudices to me will reach different conclusions if they should attempt to replicate the study.

[9] One example is the site for the region of my youth: http://www.thisisdorset.net/

2. If the figures for offline readership are open to interpretation, then the figures for online traffic represent an even lower degree of certainty about the kind of knowledge they give. There is an urgent need for reliable studies of the usage patterns of online newspapers to help us reach conclusions about what the figures given above really represent. The figures given for the visitors to each site are probably reliable because they come from a source whose existence depends on the impartiality and robustness of its measurements. What I do not have any idea about, however, is what these figures represent in the way of real social behavior.

3. With any social investigation, there is always a question of how far it is possible to generalize the findings, and this study is no exception. Most work on online media, my own included, tends to rely very heavily on the U.S. example. This is legitimate, because the United States was the place where the Internet first developed, it is by far the largest market, and its media are numerous, wealthy, and innovative. The United Kingdom is a small market, and it is very far from being the most wired society in Europe, let alone approaching U.S. levels of connectivity. There is, however, one factor that makes the U.K. national press market a particularly interesting one from the point of view of this study: It is unusual, but not unique, in that it is a large market in which there is vigorous competition. This is not the case in the United States, for example. I am therefore examining a range of newspapers, each with its different offline bundle that it seeks to translate into an online version (and to monetize the resulting traffic). A variety of online strategies thus co-exist at the same time, and the possibility of a natural experiment in which things work and in which they do not is uniquely possible here.

Bearing these important reservations in mind, it is possible to advance some tentative conclusions. The first of these is that, although current economic conditions have not yet driven any title out of the web space, two of them have effectively abandoned any attempt to develop a strong profile there. The remaining titles represent a range of responses to the opportunities presented by the new medium, and it is clear that the titles that have developed these to the greatest extent are the serious, news-oriented broadsheet media rather than the tabloids that dominate offline circulation. Those tabloid titles that have attracted criticism from politicians, elite journalists, and academic commentators for their inability to engage with the traditional agenda of the public sphere have been much less successful online than offline. The material on which they concentrate is certainly available online, but it is distributed among a number of specialist competitors, and is often available in a more attractive format from these places than from the web sites of these newspapers.

On that basis it is possible to construct an extremely positive picture of the online newspaper and its potential for public life. The newspapers that are most successful are the ones that have developed a large quantity of high-quality, innovative editorial material and who use the unique resources of the web to enhance the information and opinion open to their readers. They are the titles in which commercial content is least prominent and are prepared to act as gateways to other websites, including those of competitors. What is more, these sites are the most successful on the web. The newspapers that dominate the offline market are weakly represented online, and their offerings have proved much less attractive than the serious press. Those newspapers whose speciality is servicing the public sphere attract far more visitors than those whose speciality is entertainment of one form or another. On this gloss, the evidence seems to suggest that the public sphere is much better served online that it has ever been offline.

There is, however, a dystopian prognostication, which it is equally possible to construct out of the above evidence. The ability to exploit the potential of the web in enhancing the public sphere is only possible to those media institutions that are relatively free of commercial constraints. The BBC, of course, is funded out of a licence fee and the *Guardian*, although a commercial newspaper, is owned by a trust that is immune from the necessity of maximizing share price or dividends. Other media, which work under the daily pressure of the market place, have been unable to discover a model that allows them to deliver even their offline content and still operate profitably online. The logical consequence of that position is that they will be driven toward the separation of online editorial and advertising, along the lines pioneered in the local press and called here a Type 6 newspaper. The online editorial material will find it difficult to act as a revenue generator, and will thus be little more than a selection of the offline material designed simply to register an online presence and shunt traffic through to the advertising site. This latter will be extremely rich, both in content and in "editorial" material related to the particular class of transactions in question. It will not, however, be editorial content of the kind that is related to the public sphere.

All of this would not matter, perhaps, except that I know that offline news consumption is socially stratified. The U.K. national press market is a competitive market but it is also a segmented one. The newspapers that do well online are ones that have a disproportionately elite readership offline. There is every reason to suppose that news consumption online will have similar internal differentiations. The kind of news that the *Guardian* provides online has as much of a class inflection as does its offline version, if not more so. It is not only physical access that constitutes an obstacle to readership of quality papers online. Their habitual concerns, their definitions of leisure and culture, their choice of sports, the language they are written in, the sheer number of words they use, and cultural assumptions that must routinely be deployed in order simply to understand their full range of content, are all tailored to the interests of the better educated and more affluent citizens. It is not that they do not cover "popular" subjects in the same detail as tabloid papers. Very often they do mention such stories, and some times they provide more, and more lurid, details than their down market cousins. What they do cover, however, whether it is popular or elite in content, is presented in a manner that is appropriate to the tastes of elite readers.

This bias is reproduced online in an even more marked form in the online editions of these quality newspapers. Issues of digital divides and differential access aside, then, it seems very likely that the kind of news that flourishes online will be the kind that appeals to the educated elite. This class bias is somewhat moderated by the existence of a substantial online presence on the part of the BBC, although in reality the news content there shares much of the same character as that of the elite press. Offline, there is a tabloid press that, however inadequately, has served the news tastes of the mass of the population.[10] Online, there will only be material that suits the tastes of the elite. On this evidence, it does seem that very far from the diffusion of the Internet leading to a new flowering of the public sphere, the realities of social inequality will exert themselves even more strongly online. The result will be a narrowing, rather than a broadening, of access to public life.

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[10]The restructuring of the *Daily Mirror* over the last year or so into a tabloid paper that has a (relatively) serious news agenda (and a distinctly radical edge) reminds us that "tabloid" is not necessarily a pseudonym for "apolitical."