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**Multi-platform media:  
How newspapers are adapting to the digital era.**

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## **Introduction**

The role played by newspapers in supplying the interpretations of events that shape our viewpoints, ideas and many of our cultural attitudes is well recognised. But newspaper publishing has been profoundly affected in recent years by changing technologies and by forces of globalization and recession which, for some, have posed a serious threat to survival.

Much recent academic work has focused attention on the perceived ‘crisis’ in the economics of newspaper publishing (Siles and Boczkowski, 2012). Many studies have focused especially on the ways journalism and news production have been affected (Bressers, 2009; Brock, 2013; Erdal, 2011; Fenton, 2010). Digital convergence and growth of the internet and accompanying changes in patterns of media consumption and advertising have placed unprecedented financial pressures on newspaper publishing organisations (Mitchelstein and Boczkowski, 2011; Picard, 2011). The effect of such pressures have been acutely felt, particularly in the US where ‘[i]n the past year, seven major newspaper chains have declared bankruptcy, several big city papers have shut down, and many have laid off reporters and editors, imposed pay reductions, cut the size of the physical newspaper, or turned to Web-only publication’ (Kirchhoff, 2009: 1).

Declining circulations for print media have impacted adversely on the revenues of newspaper publishers throughout the developed world and this reflects a wider pattern whereby digital media and digital products of all sorts are displacing physical goods from the value chain (Graham and Smart, 2010). Thus, in the UK as elsewhere across Europe, newspaper groups are struggling to develop suitable strategic responses to the internet and related technological developments which have disrupted their long-standing successful business models (Holm, Günzel and Ulhøi, 2013)

The newspaper sector is by no means alone within industries devoted to creating and supplying culture and cultural content in finding itself at the epicentre what is sometimes seen as a period of ‘creative destruction’ precipitated by digital convergence, growth of the internet and associated changes in consumption patterns. Other sectors including film and music, book and magazine publishing have encountered considerable challenges in adjusting production practices, distribution strategies and/or business models to the contingencies of the digital era. But the pivotal role of newspapers (as other mass media) within the infrastructure of daily cultural exchange has meant that questions about the ability of newspaper publishers to successfully adjust and renew in the face of technological change have received plentiful attention.

This chapter examines and analyses a strategic response commonly adopted by newspapers in response to the impact of digital convergence and growth of the internet – that of transforming from a single platform to a multi-platform supplier of media. It provides an empirically based analysis of how players in the UK newspaper sector, in order to address environmental adversities and at the same time to harness the perceived advantages of digital expansion, have gradually re-invented themselves as multi-platform entities. Although the focus here is on newspapers, the prevalence of adopting a multi-platform corporate configuration reflects a much wider pattern across the whole of the media industry over recent years of companies responding to digital convergence by adopting an approach that entails re-conceptualising the business of supplying media as an activity involving multiple distribution platforms.

The evidence presented and summarized in this chapter was collected as part of an ongoing ESRC-funded study on how media organizations are adapting to digital convergence.<sup>1</sup> Research involved interviews with leading UK newspaper publishers including News International (publisher of the *Times*), the Telegraph Media Group (*Telegraph*), Associated Newspapers (*Daily Mail*) and the FT Group (*Financial Times*). Interviews with senior management at these organisations and analysis of each company's financial data were carried out by the author in 2012 and 2013.

Focusing particularly on the experience of UK newspaper groups, this chapter considers how the adoption of a multi-platform strategy is affecting operational and production practices and how it is impacting on consumption and content and business models. A central theme is how the imperative of finding ways of engaging and catering effectively to digital audiences is forcing ongoing adaptation in the organisation of production activities in contemporary newsrooms. This chapter also considers how newspaper publishers are using digital expansion to diversify their revenues and change the nature of their businesses. Finally, some preliminary reflections are offered on the implications for public policy of newspaper publishers moving steadily from purely print towards digital multi-platform status.

### **Why are media firms shifting to a multi-platform approach?**

Adoption of a multi-platform approach has been a common response among media companies to digitization and growth of the internet. What are the perceived advantages that have encouraged

this approach? In what ways, if any, is a converged multi-platform approach to production and distribution improving the management and exploitation of resources involved in supplying news content? How are multi-platform approaches to content production, assembly and distribution affecting the ability of media suppliers to exploit their resources and serve audience demands more effectively?

Broadly speaking, digital technology has made sharing and re-cycling of content easier than before and multi-platform re-purposing is therefore common practice (Doyle, 2013). Techniques of ‘windowing’ (Owen and Wildman, 1992) to fully exploit IP long pre-date digitisation and, in principle, are now more relevant than ever for media suppliers, albeit that the range of distributive outlets and the factors likely to dictate their sequencing is more complex in a digital context and policing copyright effectively has become much more difficult. However, migration towards a multi-platform outlook is not solely motivated by the desire to exploit content more effectively. The re-envisaging of corporate missions in a more multi-platform way also reflects a widespread recognition that major changes in consumption patterns and in the appetites of (especially younger) audiences have taken place (Ofcom, 2013). At the same time as offering opportunities to innovate, these changes threaten to leave behind media organisations which fail to adapt to the contingencies of the digital environment.

Opportunities for innovation and improved efficiency stem from the ways digital technology is reshaping relationships between media suppliers and audiences (Storsul and Krumsvik, 2013). New technology is allowing suppliers unprecedented opportunities to get to know their audiences and to match up content more closely to their needs and desires (Turow, 2012). Because of improved signaling of audience preferences, the ability of content suppliers to trace, analyse, monitor and cater more effectively to shifting and specific tastes and interests amongst audiences has vastly increased. In addition, digital platforms allow for a much more engaged and intensive relationship between content suppliers and audiences, thus providing both creative and commercial opportunities (Napoli, 2011).

. Evidence gathered through interviews with senior personnel at case study organisations suggests that, despite the continued importance for revenue generation of print versions of newspapers, all leading national newspapers in the UK now regard and present themselves as digital multi-platform entities. The Managing Editor of FT.com describes the *Financial Times*

as ‘a multi-platform business’ albeit one that is gradually more and more emphasis on digital (Carter, 2012). According to a senior executive at Telegraph Media Group (TMG):

‘We are not a newspaper company. We are not a digital news company. We are both. And our goal is make them work lock step with one another which is not an easy task but at its best it works unbelievably well..’

The requirements of being a digital multi-platform publisher differ from those of print newspaper publishing and so this journey has entailed a significant impact on the nature and the mix of resources (production skills, equipment etc) needed to successfully run a newspaper business. Thus, a process of renewal through reallocation of resources is in progress right across the industry (Doyle, 2014). This process can be dissected by examining in close detail how patterns of, for example, employment and staff usage within specific newspaper firms have changed over time. For instance at the TMG, the total number of employees in the newsroom remained relatively stable in the period from 2007 to 2012. However during this time, a pronounced re-direction in the activity of employees has been achieved through investment in developing and acquiring the specialist skills needed to ensure digital in addition to print delivery. The Digital Editor at TMG indicates that an estimated 25% of staff effort was devoted to digital distribution at the end of 2012 versus less than 10% five years earlier. The process of renewal through factor reallocation is ongoing at TMG and this is a fairly common sort of trend.

Although the exact extent and pace of change has varied across UK press groups, dynamic capability or the capacity to evolve and reconfigure in the face of changing environmental conditions (Teece, Pisano and Shuen, 1997; Helfat and Peteraf, 2011) is clearly a source of potential advantage for individual firms. Looking across the UK national newspaper as a whole, the general pattern of recent years has involved (a) a progressive strengthening of digital skills, achieved partly through re-training but also new recruitment (in areas such as digital page editing, video production, interactive graphics etc); and (b) more investment in *equipment* to support digital multi-platform production and distribution, especially in content management systems (CMSs). These are the software systems that allow journalists do a lot of the work on assembly, headlines, pictures, layout etc than used to involve separate specialists; and new CMSs also make it easier to publish and distribute across multiple digital as well the traditional print formats.

## **Effect of multi-platform on news production and content**

As well as transforming the nature and the mix of resources needed to be a newspaper publisher, the journey towards digital multi-platform publishing has impacted heavily on the daily routines and workflows and on decisions about how to produce and present news content. Awareness of the multi-platform dimension and a desire to exploit digital distribution opportunities can affect the sort of news stories which are selected and how they are covered. Across the UK national newspaper sector, many managing editors agree that video, pictures and graphics are especially important in conveying a story on digital platforms and so the potential availability of, for example, an appealing video clip will in some cases affect the perceived newsworthiness of a content item under consideration.

Thus, distribution across digital platforms will to some extent shape the sort of news content that is selected and produced. According to the Digital Editor at TMG, digital distribution works especially well for high profile stories with a strong visual element and immediacy. The Commercial Director of Times Newspapers agrees that, on account of digital distribution, immediacy is an imperative. When a story breaks journalists must now get something onto the website within 15 minutes whereas in the past they would have until the deadline for print production in the evening. The Managing Editor at the *Financial Times* concurs that the way in which stories need to be written up has changed, with more emphasis on blogs and on providing a 'two paragraph quick news take' as opposed to lengthy analytical pieces.

Another way in which content is being re-shaped in response to delivery across digital platforms stems from the two-way data flows facilitated by digital technology. At the same time as news content is supplied on digital platforms, the availability of data coming back to the supplier along the return path about the ways in which that content is being used ensures that editorial teams are provided with much increased and improved information about what readers like and dislike (Turow, 2012). Tagging of digital data means that editors and journalists now know which elements of content are particularly appealing and this intelligence can impress itself over what is supplied in numerous ways.

In the newsrooms of most major UK newspaper groups, screens that convey web analytics in real time are an increasingly prominent presence providing vast volumes of information in a constant feedback loop. So, as well as monitoring a range of potential sources of news stories

(now including social media), journalists and editors are now also monitoring and responding to real time data on screens telling them which stories are trending and receiving most attention on social media. Such feedback often has an immediate effect on the positioning and prominence given to news items and on how much coverage they receive. At the *Telegraph* for example, daily news conferences for print and digital are chaired by the same overall editor and, according to the Digital editor, selection of stories is strongly informed by data ‘on what is doing well on Google, on Twitter, on Facebook, on our own site’.

Analysis of return path data at an aggregate level (i.e. across the full readership for any title) currently provides valuable information that can help editors to broadly re-shape and improve their content offerings. However, for the Digital Editor of TMG, the future will involve greater use of more granular and individualised return path data to tailor the product more effectively. The view that figuring out how best to use return path data to provide individually tailored content services will be vital in future is by not confined to newspapers but is shared by senior executives in the UK television sector including at the BBC. Looking beyond the UK media industry, some online content providers such as Yahoo are already proficient in using the digital return path to gather signals about tastes and preferences and to target and shape delivery at the levels of individual consumers, for example by varying what is displayed on the home page from one receiving device to the next, based on historic consumption behaviours (Doyle, 2013).

While digital delivery makes automated customization entirely feasible in technological terms, it is questionable to what extent a move towards fuller reliance on algorithm-driven tailoring of content makes sound business sense. A number of senior managers at UK national newspapers interviewed in 2013 were adamant that part of the ongoing value and appeal of newspapers and of newspaper brands stems from the editorialising function carried out by editors and journalists that give each title its distinctive voice. Therefore, while the additional data about audience preferences collected via the return path is regarded as being of significant value, in the words of one *FT* executive, ‘editing by numbers’ is something that most newspapers want to avoid.

An additional concern about moving towards catering to individual rather than mass audiences is that, as the Commercial Manager of News International put it, producing high quality professionally-crafted news content is expensive and so, irrespective of technological advances, the newspaper business remains reliant on being able to spread costs over large numbers of readers/ users. In essence, a potential danger is that strategies of personalisation may cut across

publishers' ability to harvest the scale economies which have long been integral to the business of news publishing.

The migration to a multi-platform approach has entailed a need not only for new sorts of resources in newsrooms and new thinking about news content but also changes in patterns of work. For most national UK titles (although not the *Daily Mail*), the transition from print to print plus digital distribution has been accompanied by a restructuring of news production operations to facilitate converged content creation for both print and digital editions. Earlier newsroom studies have highlighted challenges surrounding embedding a fully converged multiplatform and/or 'digital first' approach to news content creation (Bressers, 2009; Erdal, 2011). Our research into the national UK newspaper sector confirms that, despite the economic imperatives that favour a joint or converged approach to news production, achieving this is beset by many challenges, not least amongst which is the tendency for the traditional routines and values associated with print to continue to reign supreme notwithstanding the progressive ascendancy of the needs of the digital end user.

For an emerging web-connected generation, the means and habits by which content is consumed in an online context – involving short and frequent visits to news sources - is very different from traditional approaches to consumption of print newspapers. Subscribers to a digital news content service generally expect to make multiple visits per day to the service in question so the need, on digital delivery platforms, for engaging content that is frequently refreshed and updated is great. However, achieving a news production culture in which journalists post fresh content around the clock is somewhat at odds with the 11-hour daily window within which most journalists typically work and with the 24-hour print cycle with a deadline every evening which has traditionally dominated in print newspaper publishing.

Achieving a fully converged or integrated approach to print/digital news production is, according to the Digital Editor at TMG, an ongoing process with several stages still to go through. It involves a change of mindset amongst journalists with more orientation towards 'the digital side, because that's where the growth is in terms of audience and revenues'. For example, the section head for motoring should be using digital platforms to gauge and engage the interests of readers via blogs and email alerts and 'from waking up in the morning [should be] thinking about what is obsessing petrol heads and commissioning stories about that; writing about it and living and breathing the web'.



On account of the large volume of feedback about user preferences available to newspaper publishers via the return path, it is now possible for editors to assess not only which sorts of news stories and other content items are popular and with whom but also what periods in the day the peaks and troughs occur in online consumption of digital content. At the *Financial Times* for example, managers have at their disposal large volumes of return path data indicating when the peak periods occur in terms of subscriber engagement with FT.com content. They know the times of day when the FT's online content service is being most heavily used by its subscribers and typically these are in the early morning and at lunch time in the UK and in the US. So in order to cater effectively to the appetites of digital subscribers it would make sense to refresh online content at times that fit with these consumption patterns. Yet, as one senior manager conceded, it remains the case that, typically, an analysis of the number of stories published every hour at FT.com throughout a 24-hour period will show a very marked increase in the early evening when the print edition of the newspaper is approaching its production deadline (Doyle, 2014).

Despite the availability of copious return path data, a misalignment still occurs between spikes in usage of online versions of newspapers and the daily publication cycle. This was a key concern addressed in an open memo from *Financial Times*' Editor Lionel Barber to the newspaper's staff in October 2013 calling for greater flexibility in work practices and for journalists to 'publish stories to meet peak viewing times on the web rather than old print deadlines' (Barber, 2013b). This misalignment reflects a stubborn adherence within newspaper publishing to the traditional routines and practices of print production. Many staff are still working to the deadlines that were right for the print era but this does not suit the needs of the digital era and this tendency is widespread right across the newspaper industry and overseas including at leading titles such as the *Wall Street Journal* (Romenesko, 2013).

Earlier work examining transition to a multi-platform approach within the UK television industry has identified how, in television as well as in print publishing, overcoming a prevailing orthodoxy in which traditional production cultures continue to hold sway represents a particular challenging aspect of adjustment to a digitized world (Bennett and Strange, 2012). Amongst newspapers, the strength of traditional print routines continues to restrain recalibration of workflows. The supremacy of traditional print journalistic culture can impact on processes of business innovation too since, according to interviewees, one of the conditions required to foster

successful experimentation is close integration between IT specialists and journalistic staff (Doyle, 2014).

### **Reflections on Implications for Policy**

Despite the challenges involved, a key motive driving newspapers to become digital multi-platform publishers is in order to diversify revenues and reduce reliance on print sales (Picard, 2011). Many are experimenting with use of interactivity as a means of building new income streams, for example, through deploying data-driven marketing techniques to increase digital subscriber levels (as the *FT.com* does) and through use of return path data to sell behavioural advertising (as *Mail Online* and most other titles do). However, newspapers are faced with some very serious competitive threats in the digital arena from, for example, social networking services such as Facebook that generally are much better placed to gather detailed consumer data and to sell targeted behavioural advertising and from the rise of automated advertising sales (Fuchs, 2012; Goldfarb, 2013).

Thus, many have sought to move beyond the traditional mainstays of reader payments plus advertising by developing a range of online income generating activities such as retailing, membership clubs and online gaming that capitalize on high volumes of consumer traffic surrounding news content on digital platforms. The cultivation of new streams of income in some instances involves full-scale downstream diversification into online activities and markets that are in fact quite distinct from the core business of news provision. Newspapers such as the *Telegraph*, *Times* and *Daily Mail* have developed new websites that function as separate standalone businesses, for instance selling holidays or cars or offering e-recruitment services or last-minute deals. While some of these distinct new businesses areas involve elements that are complementary to news publishing (e.g. because they allow for re-use of editorial content or data sharing with the newspaper or cross-marketing) the new ventures are not necessarily functionally interdependent with news publishing (Doyle, 2014).

Diversification away from news publishing raises questions about strategic coherence given that, in the words of one senior UK newspaper executive, the specialist skills involved in operating shopping and gaming businesses ‘are not [necessarily] native to newspaper publishing’. However, an additional concern relates to the potential for blurring of the lines between editorial

and commercially-driven content. The interviewees spoken with in the course of our research were alert to this concern and to the need for transparency and for editors to vigorously maintain the independence and integrity of news content. However the more that newspaper groups gather within their ambit new and unrelated commercial activities that feed off the traction around online news, the greater the potential for a clash between the commercial versus editorial aims invested in provision of that content.

Another issue of likely interest for policy-makers stemming from the migration to multi-platform delivery relates to the increasing propensity amongst newspapers and other media suppliers to collect data via digital return paths about the behaviours and habits of consumers. Amongst leading UK newspaper groups, it is now common practice to use return path data at least at an aggregate level but where feasible at an individual level too partly in order to tailor and improve content delivery but also in order to sell behavioural advertising. Publishers of newspapers and magazines and also television broadcasters are increasingly alert to the advantages of registration systems that enable the collection and use of data at a granular level about the preferences, tastes and habits of readers and users. As Turow notes, ‘[t]he quiet use of databases that combine demographic information about individuals with widely circulated conclusions about what their clicks say about then presents to advertisers personalized views of hundreds of millions of Americans every day without their knowledge’ (Turow: 2012: 89). The increasing use of personal data raises concerns not only in relation to intrusions against the privacy of individuals but also about the potential for undisclosed profiling and related risks of social discrimination (Goldfarb and Tucker, 2011).

At a time when pluralism is a recurrent theme on national and international policy agendas, another potential concern is how the adoption of a multi-platform outlook is affecting diversity of content. One aspect of the transition to distribution across digital platforms which raises questions for pluralism is that of personalized products. To the extent that use of return path data by news media to tailor and individualize services so that they contain only those stories deemed to be of relevance to any particular reader (thus assisting targeted advertising) in on the increase, from the individual reader’s point of view such filtering comes at the cost of a progressive diminution in the range and diversity of content to which s/he is exposed.

Another concern is how the advent of multi-platform distribution is affecting diversity within the composition of output supplied by such major national UK title brands such as the *Times*,

*Telegraph* and *Guardian*. It is clear that the transition to multi-platform distribution has multiplied the overall volume of news output published under the auspices of each of these brands since, instead of constituting just a print product, the ‘newspaper’ is now supplied simultaneously in digital versions. Our research findings suggest that the number of staff involved in leading UK newspaper groups has in some cases decreased and in others grown but overall levels of newsroom staffing generally remained relatively stable over the period from 2007-2012 (Doyle, 2014). During this same period, the volume of outputs produced by newspapers has multiplied enormously – readers are now supplied with online, iPad and mobile versions of newspapers and with a plethora of accompanying outputs from leading journalists across social media. At first glance, it seems fair to conclude that cost-efficiency within news production has improved dramatically. But how is the composition of news output changing? To what extent is multi-platform publishing contributing to a widening of content diversity and choice or, conversely, in what ways is it encouraging re-cycling of the same content across multiple platforms and greater emphasis on a narrow range of high impact?

According to the Digital Editor at TMG, the transition to multi-platform distribution has vastly increased the volume of output of the *Telegraph* and, to some extent, has increased diversity with more blogs, video content and picture galleries and with many more stories published online than appear in the paper. On the other hand more ‘papers are slowly recognising the need to attach their brands to a smaller number of areas of expertise’ in order to reinforce and sustain their own clear identity. He argues that producing a larger number of stories is not necessarily advantageous to the strategic positioning and profitability of a newspaper:

‘if you said a journalist five years ago, “by the way for your information we are going to double the outputs of content” they would have been up in arms saying we would destroy standards and all the rest of it. And actually no-one asked them to do that – no-one said “double your outputs”. But they did it anyway. [But] that may not be a good thing. There is no compelling evidence that producing an ever-greater number of stories is good for your business. You could certainly argue the reverse – that it is about *quality* not volume. About having a distinctive brand built around a smaller number of stories’

Likewise at the *Financial Times* the volume of news output has multiplied massively from 20 years ago when all that existed was a single print version. The Managing Editor confirms that there are more stories and a greater diversity of content on the web version rather than in the print newspaper but he questions whether having such a ‘long tail’ is ideal and says it exists partly

because they are still working to establish 'what works on the web'. As integration across digital and print has progressed, a redirection of resource in favour of digital has resulted in the print newspaper becoming more 'simplified'. The Managing Editor explains that whereas in the past four different regional editions plus different time editions were published, efforts are now being made to cut back to a more common global edition. This was confirmed in a memo from *Financial Times* Editor Lionel Barber to staff in January 2013 which spoke of the need to 'sharpen' commissioning in order to produce content for a more selective, common paper with emphasis on priority stories (Barber, 2013a). A subsequent open memo confirmed that the transition to a single print edition of the *Financial Times* will go ahead in the first half of 2014 (Barber, 2013b).

In general, a converged approach to content production has facilitated and encouraged an emphasis on potentially high impact stories, stories that reinforce distinctive brands and the re-use of content across platforms. According to the Commercial Director of News International, the additional resource involved in creating each digital version of the *Times* is 'the equivalent of producing another edition - it is no more or less than that... because your basic content is already prepared'. The view that digital output is largely a re-cycled version of print news content tends to support conclusions from an earlier empirical study carried out at Goldsmith's College in London into how digitisation is affecting news production. This study found that the Internet has not, in fact, expanded the news we read or hear nor changed mainstream news values and formats but rather has contributed to a relentless re-cycling of content across platforms which, while making it easier to access news at all times, may at the same time be harmful to quality and diversity (Fenton, 2010). And similar findings emerge in earlier research about how migration in the television industry towards a multi-platform approach is affecting content: a common response amongst broadcasters is to focus on producing fewer bigger programme ideas across several platforms (as opposed to several smaller productions) and to place more emphasis on high profile projects with extended life spans (Doyle, 2010). Thus, as the question of how best to promote pluralism and diversity in an era of technological change is under consideration by policy-makers both in the UK and Europe, it is worth remembering that the media industry's migration to a multi-platform approach to distribution, while unquestionably extending opportunities for consumption of content, is also propelling strategies of brand extension, content re-cycling and the relentless market presence of a limited number of high profile content properties.

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<sup>1</sup> This is a UK Economic and Social Research Council-funded project titled ‘Multi-platform media and the digital challenge: strategy, distribution and policy’, which runs from July 2012-June 2015. Principal Investigator: Gillian Doyle; Co-Investigator: Philip Schlesinger; Research Associate: Katherine Champion.