Re-Bel initiative

Rethinking Belgium's institutions in the European context

The Future of Belgium's Press

Lead piece by
Els De Bens and Karin Raeymaeckers

Comment by
Frédéric Antoine

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The Re-Bel initiative aims to rethink in depth, in an open, rigorous, non-partisan way, what the institutions of the Belgian federal state - or of whatever else this part of the world needs to become - can and must look like in the longer term, taking full account of the evolving European context.

The Re-Bel initiative does not aim to produce one programme or manifesto to which everyone involved could subscribe. Its ambition is rather to provide a fertile intellectual environment in which new ideas and promising initiatives of all sorts can germinate and develop, with a concern for their relevance to a thorough reform of Belgium's institutions, but also to the institutional design of other complex polities, most obviously the European Union.

The Re-Bel initiative involves scholars from all Belgian universities, runs a web site, publishes e-books and organizes workshops and public events. It intends to associate to its activities both foreign colleagues and the Brussels-based international community. The working language will usually be English.

The Re-Be initiative is supported by the University Foundation, which will host all its activities. The University Foundation was founded in Brussels in 1920 at the initiative of Herbert Hoover and Emile Francqui. One of its missions, also central in the Re-Bel initiative, is to foster fruitful contacts and collaboration between academics of all Belgian universities.

Each contribution to a Re-Bel e-book is written under the sole responsibility of its author. The views expressed in it cannot be assumed to be shared by either the Re-Bel initiative as such or the University Foundation.

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Foreword

Paul De Grauwe and Philippe Van Parijs

The 13th public event of the Re-Bel initiative, from which this e-book stems, was held on 18 June 2015. It hosted highly instructive presentations by Els De Bens (UGent), Frédéric Antoine (UCL) and François Heinderyckx (ULB), followed by a lively panel with the participation of Ides Debruyne (Journalism Fund), Béatrice Delvaux (Le Soir), Tom Naegels (De Standaard), Leo Neels (ex-Belga) and Karl van den Broeck (Apache).

Central at the meeting was the sharp contrast between trends in circulation (i.e. average number of copies printed per day, whether sold or not) in the Dutch-language and French-language daily press, as strikingly illustrated by Figure 5 in the lead piece (reproduced below). From a media landscape massively dominated by the French-language press up to the middle of the twentieth century, we have been moving at a quick pace to one dominated by the Dutch-language press. Such a phenomenon is far from irrelevant for an initiative such as ours that is focused on Belgium's institutional future.

	Flemish daily press	Francophone daily press
1960	1.117.331	1.385.762
2000	1.223.400	672.311
2012	1.062.071	474.097

Lead Piece

The future of the Belgian Press:

Common challenges and contrasting prospects in the North and the South

Els De Bens and Karin Raeymaeckers (Universiteit Gent)

1. Historical perspective

After Belgium became independent in 1830, it had one of the most liberal press regimes in Europe. Many foreign journalists, mainly from France, were attracted by this liberal press climate and settled in Belgium. All political tendencies were represented, from unionist-oriented newspapers, which defended the new Belgian state, to Orangist newspapers, which wanted to join up again with the Netherlands. The French-language press had a dominant position. French was the official language. The Flemish newspaper market was very small and the newspapers were only published one or three times per week. A majority of the Flemish people were illiterate, poor and could not afford an expensive daily. Stamp duty kept the price of the newspapers high and the press continued to be the privilege of the wealthy bourgeoisie. In 1844 the first Flemish daily *Vlaemsch Belgie* was launched but after 10 months the newspaper folded due to a lack of funds.

In 1848, the stamp duty were abolished and the price of the newspapers fell. It was mainly the French-language newspapers, with their larger potential readership, tha benefited. The daily Flemish press did not develop fully until the last decades of the 19th century. A number of economic and social factors stimulated its growth: the decrease of illiteracy, the implementation of the first important language laws and universal suffrage. The fall of the price of the newspapers was a very important factor. The abolition of the stamp duty had reduced the price, but the introduction of advertising became a crucial source of income. In addition to its readers, newspapers gained a second market, the advertisers. Another important factor in the development of a large newspaper market was the result of new technologies. New typesetting and printing techniques enabled newspapers to be produced faster and with high circulation figures.

Towards the end of the 19th century, many new newspapers were launched. Most of the titles that still exist today were founded at the end of the 19th century. The circulation of the French-language press at the end of the 19th century was still dominant. The Flemish press still lagged behind but it had come a long way.

The first world war slowed down the expansion of the Belgian newspapers. However, after the Armistice most prewar newspapers resumed publication and a number of new newspapers were launched. During the interbellum, the circulation of the Flemish press remained lower than that of the French-language dailies but the enormous gap that had existed since 1830 had been almost closed.

The second world war had a greater impact on the development of the newspaper market because quite a lot of newspapers that had "collaborated" were suspended and several journalists received a *Berufsverbot*. Of the 65 pre-war newspapers, only 39 continued to appear after the war. The number of titles kept decreasing over the years. The number of daily titles gradually decreased, mainly as a result of mergers. Unlike many other European countries, the main concentration trends did not begin until after the second world war.

Over the years the total circulation of the Belgian newspapers did not experience drastic fluctuations but it has been declining steadily . From 1975 onwards the Flemish press prevailed over the French-language press and this trend persisted in the following years.

In this contribution we shall examine the present newspaper market . We shall analyze the causes and consequences of the concentration process, the fluctuations of the readers and advertising markets as well as the competition of online media. In the analysis we shall also point to differences between the Flemish and the French language newspaper markets. Although many newspaper companies are today diversified, holding positions in other media markets, such as in the market of free sheets, of periodical magazines and of broadcasting, this article will mainly focus on the key characteristics of the print media market, and more specifically of the newspaper market.

2. Ongoing concentration process of the Belgian newspaper market

Since the 1960s, the Belgian newspaper market has experienced an increasing number of mergers. As a consequence of the privatization boom of the 1980s the number of mergers increased fast. Some newspaper titles and a number of newspaper companies stopped their activities. The launching of new daily newspapers became very difficult. Fig.1 shows the decline of newspaper titles and of independent newspaper companies.

Fig 1 Increasing concentration in the North and the South

	Flanders		French-speaking part		Belgium	
	Titles	Comp.	Titles	Comp.	Titles	Comp.
1950	18	14	30	20	48	34
1980	12	7	22	10	34	17
2006	10	3	12	2	22	5
2015	8	2	9	3	17	5

2.1 Newspaper markets in Belgium in 2016: concentration process consolidated

In the next figure (fig.2) we represent the consolidation of the concentration process.

In 2016 in Flanders the remaining eight newspapers are published by two media companies, which implies that the Flemish newspaper market has moved into a duopoly. In the French-speaking part, a short-time duopoly was established since the Flemish newspaper group Corelio bought in 1999 Medi@bel (Vers L'Avenir+ IPM) and Rossel remained the only other media newspaper group. This situation however ended when IPM stepped out of the Medi@bel construction. In 2013 Corelio sold Medi @bel (the Vers l'Avenir titles) to the cable company Tecteo. Today the French-language newspaper market is owned by three companies.

Fig 2 Newspaper markets in Belgium in 2016

The Flemish market: **A duopoly**	**The Francophone market:** **From a duopoly back to 3 enterprises**

• **De Persgroep**
  • Het Laatste Nieuws
  • De Morgen
  • De Tijd (Mediafin)
 	
• **Het Mediahuis**
  • De Standaard (Corelio)
  • Het Nieuwsblad
  • Belang van Limburg (Concentra)
  • Gazet van Antwerpen
  • Metro
	• **Rossel**
	  • Le Soir
	  • Sud Presse (La Capitale, La Meuse, La Nouvelle Gazette, La Province)
	  • L'Echo (Mediafin)
	  • Metro
	• **IPM**
	  • La Libre Belgique
	  • La Dernière Heure
	• **L'Avenir (Tecteo)**
	  • L'Avenir

2.2 *Causes and Consequences of newspaper concentration*

Newspaper publishers have chosen for mergers in order to strengthen their market position. Media research has demonstrated that concentration can have negative as well as positive consequences. Most of the opposition against media concentration stems from the concern for the loss of pluralism. Concentration, however, has been for some newspapers quite positive as a rescue in a highly competitive market. Concentration stimulates economies of scale and has an impact on the typical cost structure, where especially the "first copy" costs are a burden for smaller newspaper companies. "First copy" costs refer to those costs that are inevitable irrespective of the scale of the newspaper circulation. Other costs for sustaining the titles in future reader markets can also be shared, for example costs for innovation strategies and online activities.

In a larger media group that has different print titles in its portfolio, newspaper brands often also benefit from a stronger position of the group as a whole on the readers and advertising market. Furthermore, being in a larger scale group helps to unlock financial resources that are necessary to maintain and improve the characteristics of editorial content and quality. In the Belgian newspaper market we can find case studies that demonstrate the positive influence of concentration as well as case studies that indicate that one should always take into account the risk of a decline in pluralism. As a positive example, scholars often mention the socialist newspaper *De Morgen* that went bankrupt and joined the Persgroep in 1989. The new owner guaranteed editorial autonomy and *De Morgen* could survive, although in the first years it remained quite difficult for the brand to invent a new strategy that was successful in the reader market. As a negative example of concentration scholars often point to Corelio, the former Standaard group. It acquired many titles in a process of concentration, but some of them were suppressed quite soon after the merger or persisted only for some years before disappearing (*Het Nieuws van den Dag* , *Het Handelsblad* and *Het Volk*)

Denis Mc Quail underlines that despite the large amount of research it is difficult to draw general conclusions concerning positive or negative results of press concentration. One has to take too many variables into consideration and each case is different (Mc Quail, 1992: 116). Peter Bruck concludes that media studies do not have a satisfactory answer to the question of whether concentration has a harmful effect on media diversity (Bruck 1994: 17). Diversity is also threatened by other factors than concentration alone. Homogenization is also triggered by using the same news sources, the same editorial procedures and selection criteria regarding news value. Authors like Robert Picard (1998, 38) have argued that cut-throat competition and commercial pressure is the real threat to diversity and quality. The struggle for the largest possible market share, especially in duopolic newspaper markets, result in conformity.

Publishers reposition their newspapers more "downmarket" and add more articles that can be labeled as more human interest, sensation and personalized news in order to attract the largest possible readership or the most impressive traffic figures on their online platforms. This is of course a strategy for boosting advertising revenues that are shrinking very dramatically for newspapers.

Many media scholars point to the reduction of political and especially of international news and although there is still a lot of political news in quality newspaper brands, one cannot deny that there have been many cuts in editorial staff, especially for foreign news.

Newspaper content also felt the impact of the so-called "service journalism" in the form of supplements and magazines about lifestyle, gardening, cooking, fashion, tourism, etc . As the decline of the readership market urged the newspaper industry to strengthen promotional activities, this can also lead to tearing down the wall between editorial and commercial departments, thus leading to the growing influence of the marketing department on editorial strategies. The appearance of the so-called 'branded content' in newspaper columns is a signal that threatens quality of newspapers and most importantly their credibility, which still is the main asset of newspaper brands.

2.3- Concentration and expansion abroad

In order to expand their segment of the market, newspaper publishers looked for alliances abroad. Some Belgian newspaper publishers have participations in media companies abroad. The Flemish De Persgroep acquired in 2014 two Dutch newspaper companies: 58% of PCM (*Het Parool*, *Trouw*, *het Algemeen Dagblad*, *De Volkskrant*) and 100% of Wegener (regional newspapers). De Persgroep also acquired some media brands in the Danish newspaper market. In 2015 Mediahuis acquired the Dutch quality newspaper *NRC*. One can conclude that the Flemish newspaper groups are major stakeholders in the Dutch newspaper market, owning the majority of titles including the main national quality newspaper brands.

Rossel expanded its activities to France and acquired 88% of the French *La Voix du Nord* and an alliance with *Nord Eclair*. It is obvious that language and cultural affinities play an important role in these foreign alliances.

It is interesting to notice that there are no more important mergers between Flemish and French-language newspaper companies since Corelio withdrew from the French-speaking newspaper market after the breaking up of the Medi@bel construction. In 2016 the only remaining joined partnership is Mediafin (editor of the financial brands *De Tijd* and *L'Echo*), in which De Persgroep and Rossel also participate (since 2006).

3. Evolution of newspaper circulation and readership in Belgium

3-1 *Confusing data about "circulation", "sold copies", "readers"*

"Circulation" refers to the total number of copies that are published. "Sold copies" refers to the subscriptions and the number of newspapers sold as single copies. In Belgium readers purchase their daily either by way of a subscription or by buying single copies.

The first two parameters, circulation and sold copies, are quite clear but the concept of "readers" is often confusing. This parameter indicates how many people read the newspaper. It is assumed that a newspaper is read by more than one household member. The copy sold is often multiplied by three. In certain cases especially for quality papers the number is multiplied by four or even five. Publishers like to use the "readers" figures as they are higher than the figures of the circulation and copies sold (De Bens 2007: 143). We shall use in this contribution the figures of the sold copies (subscriptions and single copy sale) .

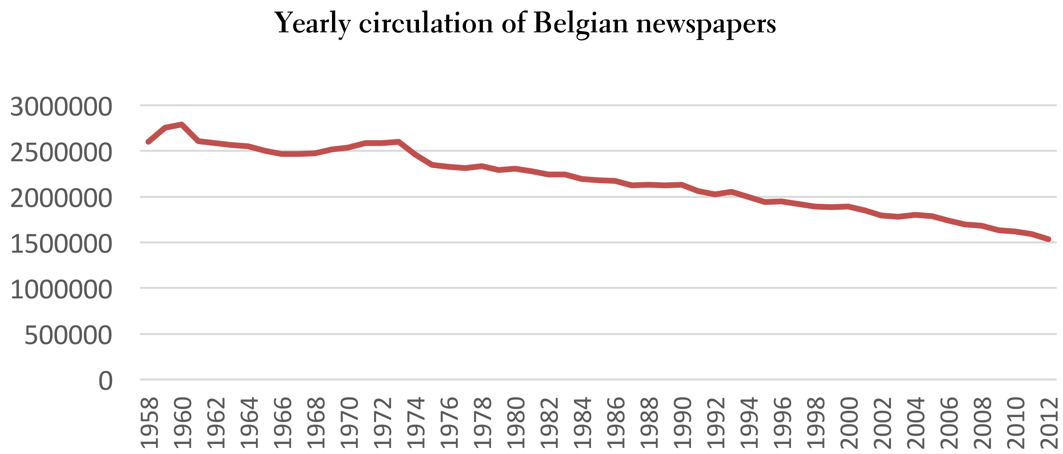
If we want to analyze the evolution of the circulation figures over a long period, we have to face a lot of problems because correct figures are often missing. For the first period of the history of the Belgian press (1830-1848), we have at our disposal exact circulation figures because for each sold newspaper stamp duty had to be paid and the archives of the ministry of Finance have preserved these data. After 1848 until 1951 we have to rely on circulation figures which the publishers disclose. Some of the major newspapers handed over the control of circulation figures to bailiffs thus making the figures official because the advertisers were reluctant to pay tariffs for too highly rated circulation figures. In 1951, CIM (Centrum Informatie Media) was founded in order to professionalize the process. In Flanders all newspapers with the exception of the socialist newspapers collaborated with CIM (from 1983 onwards, *De Morgen* was also controlled by CIM). In the French language community, only Rossel and *Vers L'Avenir* accepted the CIM control from the start, but from 1987 *La Libre Belgique* and *La Dernière Heure* also stepped in, which implies that for the French-language newspapers the circulation figures are reliable CIM figures only since 1987.

3.2 Evolution of circulation of the Belgian newspapers

Fig 3 Evolution global circulation of the Belgian newspapers 1958-2015

1958	2.597.818	1970	2.540.359	1982	2.245.213	1993	2.053.000	2004	1.798.555
1959	2.757.168	1971	2.585.970	1983	2.242.922	1994	1.996.965	2005	1.790.646
1960	2.791.165	1972	2.588.662	1984	2.196.011	1995	1.944.659	2006	1.714.699
1961	2.608.912	1973	2.600.037	1985	2.180.188	1996	1.946.616	2007	1.696.942
1962	2.588.987	1974	2.462.609	1986	2.174.488	1997	1.918.966	2008	1.682.208
1963	2.562.459	1975	2.364.888	1987	2.121.898	1998	1.894.312	2009	1.633.980
1964	2.549.882	1976	2.329.262	1988	2.127.846	1999	1.884.552	2010	1.617.984
1965	2.500.737	1977	2.311.861	1989	2.120.887	2000	1.895.711	2011	1.591.522
1966	2.470.000	1978	2.332.295	1990	2.169.631	2001	1.853.833	2012	1.536.168
1968	2.472.140	1979	2.295.411	1991	2.059.000	2002	1.792.273	2013	1.296.774
1969	2.518.927	1980	2.309.036	1992	2.025.172	2003	1.781.330	2014	1.271.179

Fig. 4 Circulation of Belgian newspapers: steady decline



Between 1958 and 1990, over a period of 30 years there is a slight but continuous tendency for circulation figures to fall with the exception of a top year in 1960. In 1994 the total circulation figure falls under two million copies and it continues to drop. There is a small rise in 1992 when more newspaper copies were sold as a result of the death of king Boudewijn and in 1996 because of the Dutroux case.

The declining circulation figures of the Belgian newspapers is not an isolated case but a general trend in all European countries. The loss of readers is a complex issue that will be discussed in a separate section.

3.3 *Evolution of circulation of Flemish and French-language newspapers*

Fig 5 Evolution of circulation segmented for Flemish and French-language newspapers

	Flemish daily press	Francophone daily press
1960	1.117.331	1.385.762
2000	1.223.400	672.311
2012	1.062.071	474.097

Both Flemish and French-language newspapers have lost readers but the situation is dramatic for the French-language press. French-language newspapers had a dominant position until the end of the interbellum, when 940.000 French language copies were sold versus 820.000 Flemish ones. After world war II the francophone press still had the lead, but from 1975 the Flemish caught up (51,9% versus 48,1 %). In 2012, the proportion is significantly out of balance: 69,1% to 30,9%. By comparison, according to the best data available, 55% of the population has Dutch as their native language, and 36% French (see http://languageknowledge.eu/countries/belgium).

There are of course also notable differences regarding the circulation figures of the separate dailies.

Fig 6 Evolution of circulation of Flemish newspapers

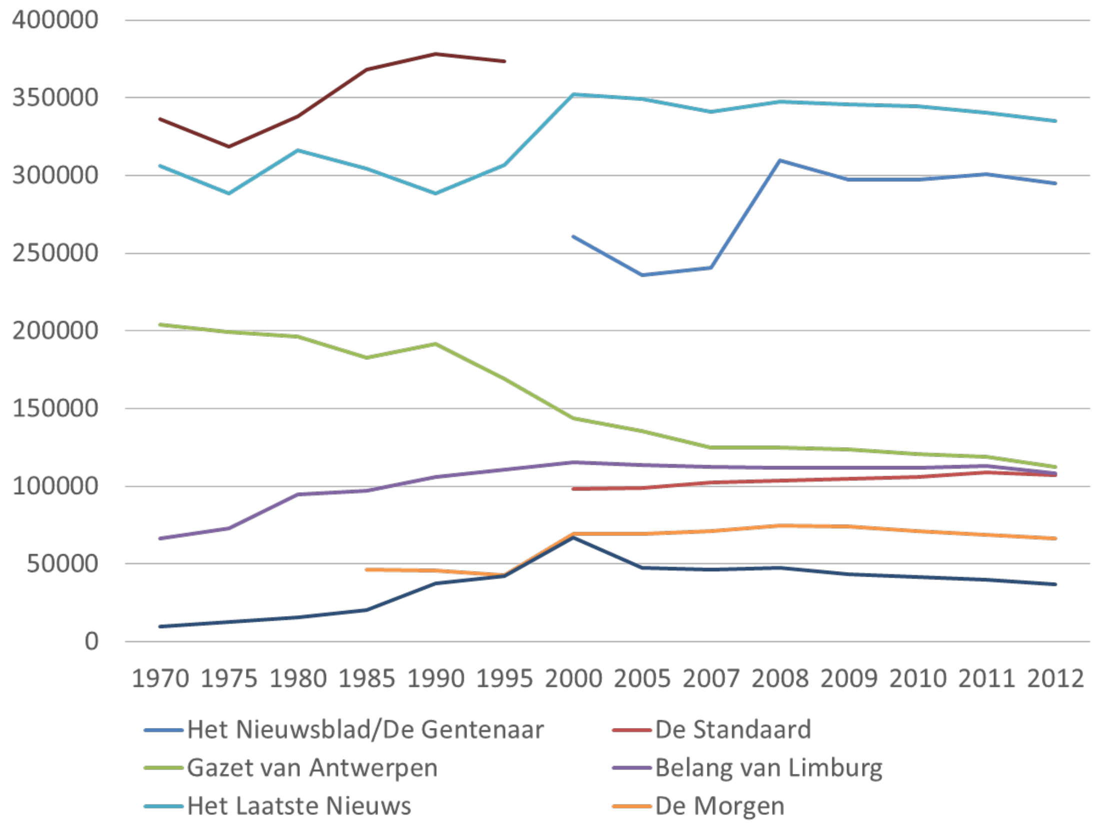
Fig. 6.1 Persgroep

	HLN/DNG		DM		De Tljd	
1975					(12.900)	
1985	254.584		37.432		17.142	
1995	249.795	-1,8%	30.308	-20%	35.169	+105%
2005	284.527	+14%	51.051	+68,5%	37.293	+6%
2010	286.679	+0,5%	54.848	+7,5%	34.261	-8%
2013	286.104	----	53.429	-2,5%	40.223	+17,5%

Fig. 6.2: Mediahuis

	HNB/DS		GVA		BVL	
1975	291.207		173.424		87.688	
1985	324.839	+11,5%	158.239	-8,5%	95.840	+9%
1995	315.402	-3%	136.911	-13,5%	100.042	+4,5%
2005	275.264	-12,5%	112.660	-17,5%	100.058	---
2010	349.354	+27%	99.457	-11,5%	97.880	-2%
2013	355.072*	+1,5%	90.907	-8,5%	93.220	-4,5%

Fig 7 Evolution circulation Flanders



According to these figures and this graph The Persgroep is doing quite well. The circulation of *Het Laatste Nieuws*, the best selling newspaper in Flanders, is stable. *De Tijd* progresses, only the title *De Morgen* loses readers. This loss is not dramatic but recent figures of 2014/2015 reinforce this downward trend. *De Morgen* changed its format and lay out drastically in 2014 and readers were opposed to this unusual change. De Morgen has returned to its former format and sale figures have improved recently.

At Mediahuis only the titles managed by Corelio show progress. The combined circulation of *Het Nieuwsblad* en *De Standaard* has risen. This good result is mainly due to the rise of the circulation of *De Standaard*. In 2013, *De Standaard* even exceeded the 100.000 copies. An exceptional success for a quality paper. The newspaper titles of the former Concentra group, however, show a negative circulation trend. Especially *De Gazet van Antwerpen* has lost a lot of readers since the 1980s. *Het Belang* van Limburg started losing readers since 2010. Key question: will the recent merger of Corelio and Concentra into Mediahuis increase the circulation figures ?

Fig 8 Evolution of the circulation of the French-language newspapers

Fig. 8.1 Group Rossel

	Le Soir		Sud Presse		L'Echo	
1975	210.070		145.182		(30.000)	
1985	172.148	-18%	107.156	-36%	(22.813)	
1995	145.250	-15,5%	92.352	-14%	20.883	
2005	96.511	--33,5%	119.977	+30%	17.862	-14.5%
2010	80.366	--16,5%	113.819	-5%	15.961	-10,5%
2013	76.451	--4,8%	100.277	-12%	16.134	+1%

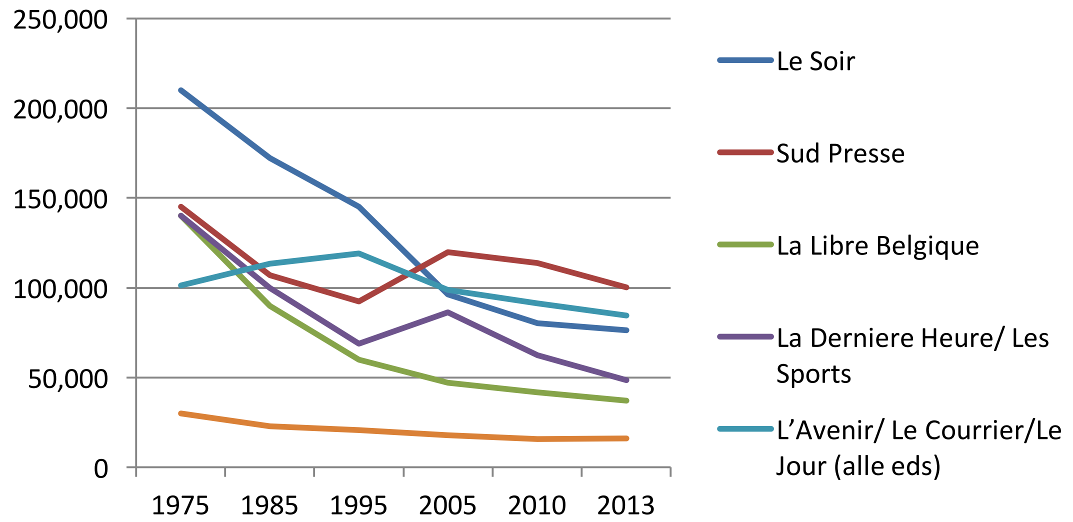
Fig. 8.2 Group IPM

	La Libre Belgique		La Dernière Heure/Les Sports	
1975	(140.000)		(140.000)	
1985	(90.000)		(100.000)	
1995	60.170		68.848	
2005	47.133	-21.5%	86.342	+ 25%
2010	41.864	-11%	62.408	- 27,5%
2013	37.158	-11%	48.685	-- 22%

Fig. 8.3 L'Avenir

	L'Avenir/Le Courrier/ Le Jour	
1975	101.279	
1985	113.586	+ 12307 (+12%)
1995	119.133	+ 5547 (+5%)
2005	98.939	-20194 (-17%)
2010	91.285	-7654 (-7,5%)
2013	84.419	-6866 (-7,5%)

Fig 9 Evolution of the market share of the French-language newspapers



The circulation figures in the French speaking part of the country show a very different picture compared with the Flemish market. The decline is much steeper, and for some titles the data look very gloomy, considering the lower copies sold every day, thus jeopardizing the future of the brands (cfr the previous remark on the impact of cost structure and the high impact of the first copy cost)

Within the Rossel group, Sud Presse is the big loser. Also the flagship of the group *Le Soir* keeps on losing readership. We can notice a progress only for the financial title *l'Echo*. It is unclear if this can be attributed to the specific nature of this brand (financial) or the result of the merger of Rossel and the Persgroep into Mediafin.

Until 1987 the circulation of *La Libre Belgique* and of *La Dernière Heure* was not controlled by CIM and the circulation figures before 1987 were probably boosted. The figures for both brands remain problematic since both brands have negative curves although the decline is more severe for *La Derniere Heure*. Also the figures for *La Libre Belgique* are under pressure and it is quite problematic that the critical mass of circulation for this quality newspaper has fallen under 40.000 copies.

The circulation of *Vers l'Avenir* declined after the merger of Medi@bel with Corelio in 1999 and this trend seems to continue after the merger with Tecteo in 2013.

4. Variables that influence newspaper readership

In almost all European countries, circulation figures have dropped since the 1960s. The declining circulation figures of the Belgian newspapers confirm this trend. There is, however, a distinct north-south dimension in European newspaper reading. In northern Europe, people read a lot more newspapers than in the south.

4.1 Different newspaper reading traditions throughout Europe

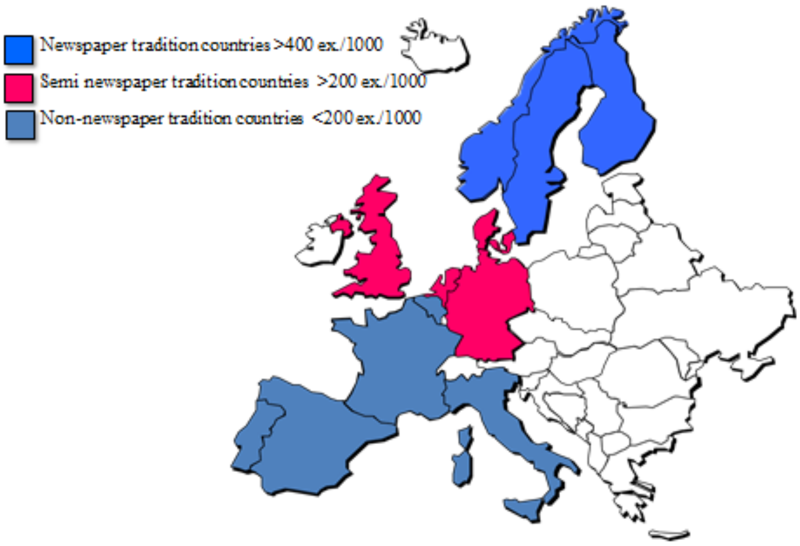
There are big differences of newspaper consumption in Europe. In the North of Europe the consumption of newspapers is high. The further south one goes, the fewer newspapers are read. If we look at the number of newspapers that are consumed per 1000 inhabitants, we find that the largest numbers of newspaper readers is in Norway (648), followed closely by the other Scandinavian countries, then Switzerland, Austria and Germany, the Netherlands and the UK. The 173 readers per 1000 for Belgium ranks in comparison with other European countries between high and low newspaper consumption. After France, the numbers decline and in the south of Europe newspaper consumption is very low (De Bens 2007: 153).

How can we explain the big differences of newspaper consumption between the north and south of Europe. Hallin and Mancini make an analysis of different patterns of media consumption related to historical, political and economic variables. They divide countries into three different models. In northern countries with high daily newspaper consumption, accelerated social integration has played an important role: good education, social welfare, etc.

Fig 10 Differences of newspaper consumption per 1000 inhabitants in Europe

Norway 648	UK 303
Finland 524	Belgium 173
Sweden 500	France 167
Denmark 437	Italy 158
Switzerland 420	Spain 122
Austria 378	Greece 67
Germany 322	Portugal 65.5
Netherlands 319	

Fig 11 Three patterns of media consumption



4.2 The importance of subscriptions: loyalty to the newspaper

Countries with a newspaper reading tradition always have a high number of subscriptions. A subscription creates loyalty whereas single copy sale is dependent on accidental occurrences such as holiday periods, bad weather, hot news, etc. High subscription rates always coincide with efficient distribution systems.

Furthermore the single-copy sale causes a lot of problems. The publishers are left with a substantial number of unsold copies. The different points of sale can return the unsold copies for free to the publisher. For the publisher this implies that they have to collect the unsold copies: a waste of time and money.

Belgian publishers have made an extra effort to increase the number of subscriptions. Especially Flemish publishers have been successful: in 2000 the share of the Flemish subscriptions was 43 % while that of single-copy sales was 57%. In 2014, the share of the subscriptions has raised to 72%!

The fact that in Belgium today a majority of readers subscribe to a newspaper is a new trend. In the past, the single-copy sale was dominant. For the publishers this is a positive change for several reasons: the reader pays for his newspaper in advance, the number of unsold copies diminishes and subscriptions stimulate loyalty .

Subscriptions need very efficient distribution systems. In Belgium, the government supports the distribution by reduced postal tariffs. This support measure for the distribution of the press is very important because efficient delivery of the daily newspaper is a crucial strategic goal in order to meet the expectations of the loyal newspaper subscriber. It illustrates that Belgium has opted for the public policy model in which a number of measures are worked out to benefit the whole newspaper sector. Together with the VAT zero tariff, the reduced postal tariffs save the daily newspaper sector billions. (De Bens, 2007:164-166)

4.3. The Internet and the traditional newspaper market: traditional readers or new readers?

The publishers invested a great deal in their online brands. For the traditional newspaper reader, the online brand has a complementary function: opportunities for updates, use of multimedia material and interaction with the editorial staff. For the occasional user, the online brand of a traditional newspaper is a reliable source. The internet offers an overload of information and the online versions of established newspapers represent credibility. Publishers hoped to attract new readers. At the start many publishers offered their online newspaper for free and they believed that advertising revenue could cover the costs. This business model failed because the online advertising revenue remained disappointing. It is correct that with the online version the costs for production, paper and distribution are lower but the online versions also require high investments. The fact that the average user of online newspapers assumed that this service was free of charge caused a major problem. For the publisher, the investments were higher than the profits and the business model was changed: in order to have access to the full newspaper, the digital counterpart of the print brand together with extra utilities as digital archive etc. one has to subscribe to the digital newspaper. The number of paying subscribers to the online version remains too limited, although some editors make an impressive progress in attracting extra subscribers also offering tailored packages for print and digital use combinations. Maybe the many new mobile devices will stimulate subscriptions to online versions. The key question remains: are these “digital” subscribers new readers or traditional readers who change the form of their newspaper?

Today it is quite obvious that the newspaper, printed and online, will survive in the digital age. The loyal newspaper reader wants to skim, to feel his newspaper, attracted by an attractive lay-out, and when he has no access to his analogue newspaper he will turn to the mobile version.

Fig 14 shows that the share of digital subscriptions in the total amount of sold copies remains rather limited. Both the financial newspapers *De Tijd* and *L’Echo* have a substantial amount of digital (only) subscribers. These newspapers have in the past invested a lot in ICT applications. In Flanders, *De Standaard* and *De Morgen* also have a considerable amount of subscribers and in the French language part *Le Soir* and *La Libre* take the lead. All together it remains a rather moderate result.

Crucial question: are these subscribers new readers or traditional readers who exchanged their analogue subscription for a digital one? More research has to investigate this issue.

Fig14 Share of digital-only subscriptions of the total amount of sold copies

	Digital subscriptions	Sold copies	%
Het Nieuwsblad	6.660	253.292	2,5%
De Standaard	11.225	100.786	11%
Belang van Limburg	3.360	93.844	3,5%
Gazet van Antwerpen	1.923*	91.013*	2%
Het Laatste Nieuws	2.821	281.652	1%
De Morgen	7.412	53.437	14%
De Tijd	8.858	40.223	22%

* 4/2013 – 3/2014

	Digital subscriptions	Sold copies	%
Le Soir	5.084	69.931	7%
Sud Presse	1.987	96.586	2%
L'Echo	2.835	15.955	17,7%
La Libre Belgique	1.979	36.978	5,3%
La Derniere Heure/Les Sports	1.329	47.674	2,8%
L'Avenir	1.426	84.161	1,7%
Grenz Echo	115	9.087	1%

4.4 Impact of the price policy

The newspaper circulation is price elastic. An increase in price has always affected the sale of the newspapers. In 1975 the circulation of the Belgian newspapers collapsed as a result of drastic increase of the selling price of the newspaper and the start of the economic crisis. There is undoubtedly a correlation between a downward newspaper market and economic decline.

Cutting the price of the dailies makes circulation figures rise. When some years ago Rupert Murdoch halved the price of *The Times*, the circulation doubled. Price wars can have a temporary effect because once the price rises again the readers will probably quit. Belgium never had to face a price war because publishers considered it a bad strategy. Belgian publishers had an agreement for fixed prices until 1996, but today the prices are still quite the same. Quality papers are a bit more expensive than popular newspapers and during the weekend the price is higher because of the extra magazines and supplements (De Bens 1998: 17).

4.5 Young adults read less newspapers

The decline of readership figures is even steeper when considering the youngest age groups. Young adults (25-30 years) give up reading newspapers even if they have grown up in a family with a newspaper reading tradition. These young adults often live alone in cities, remain single for a longer period, have a limited leisure time budget and show a zapping, restless media behavior. They have to cope with a boom of audiovisual and news media. Publishers have difficulty reaching this target group. To preserve readership in a longer time perspective, some of the policy measures for press subsidies target younger age groups.

4.6 New strategies in order to please the reader: facelifts

In order to increase sale figures publishers have tried to make their papers more attractive. On the basis of readership research, they have attempted to meet the needs of a changing reading culture. All dailies regularly change layout characteristics and some of them also modify their format. Quality papers like *De Standaard* and *La Libre Belgique* chose the tabloid format. One of the main arguments for this was that the tabloid format was commuter- friendly and user- friendly. The readers responded in a positive way and the sale figures of *De Standaard* increased.

The new look now includes various columns and sections, inserts and supplements with life style, cooking, gardening, fashion, travelling, etc. The reader is offered a lot of material and the advertiser more opportunity for targeted advertising.

From the 1990s on all dailies carried out an *editorial facelift*: new accents and sections were added. The publishers wanted to appeal to young people. Publishers repositioned their newspapers: a ‘ light hearted’ approach, more human interest, more infotainment, more personalized news. Readers seem satisfied with this new look that also gives the newspapers a fresher, more modern look, with more color and more photos.

It is clear that Belgian publishers have invested a lot of effort in order to raise the number of readers. Most newspapers suffer, however, from declining circulation figures, while production, distribution and labor costs continue to rise. Newspapers are financially vulnerable and they are not only dependent on income from the readers market but in particular from the advertising revenue.

5. Advertising: the Achilles Heel?

5.1 Display, classified, and below-the-line: publishers fight back

Newspapers are very dependent on *display advertising* revenue. To survive well, a newspaper has to realize at least 50% of its revenue from advertising. Newspapers that drop below the advertisement threshold of 35-40 % find themselves in financial difficulty. The numerous new players, such as commercial TV channels and radio, free newspapers, new media, all depend on advertising income. The advertising market has not grown. The big advertisers in newspapers used to be the supermarkets, banks, insurance companies, the automobile sector and the telecom operators.

Classified advertising such as real estate, jobs, second hand, travel, dating, etc.) have always been an important source of income for newspapers . However, since the advent of the Internet, classified ads started to migrate in its direction. With its interactive possibilities and user-friendly search systems the Internet became the best medium for classified ads. Some newspaper publishers developed a classified ad service but they reacted too late and the newspaper business lost the majority of classified ads to the internet. The publishers have to reinforce their position on the classified ads market. Some newspaper publishers have meanwhile developed successful classified ad sites like Concentra with “Hebbes.be”, Corelio with “spotter.be” en de Persgroep with “autozone.be”

Advertising below-the-line is growing and this is bad news for all media. Below-the-line refers to all sorts of advertising that do not make use of the media. Supermarkets are very active with this type of advertising with folders, flyers, news bulletins, points of sale ads. In the past, the super markets were the biggest advertisers in newspapers. Retailers have developed their own websites and shopping services on the Internet. The budgets are subtracted from the advertising budget for traditional media. Over a period of 20 years, the advertising budget of supermarkets in newspapers has dropped from 70% to 30%. In the past, Belgians upermarkets were the big advertisers in newspapers but they gradually chose more and more for below-the-line advertising. In 2000 Aldi and Lidl were the only retailers that advertised in newspapers. Recently the supermarkets have reinvented the newspaper and place again advertising campaigns.

Already in the 1960s, the publishers of Flemish and French-language newspapers decided to collaborate in order to strengthen their position on the advertisement market. Potential advertisers were offered special tariffs if they placed their ad in several newspapers. The advantage for the advertiser was a higher reach and a discount. Several ad brokers have been established but after some time the publishers quitted because they decided that the system was not flexible enough and they wanted to take control over the media planning.

5.2 *Share of advertising revenue of the different media*

Fig 15 Share of advertising revenues

Advertising revenue of the different media in Belgium 2000-2014

	2000	2005	2010	2014
Newspaper	17,2%	24,8%	22,1%	21,9%
Magazines	13,6%	11,7%	8,6%	6,8%
Television	43,2%	41,1%	40,8%	38,8%
Radio	10,3%	12,1%	11,5%	13,9%
Internet	-	-	4,9%	6,2%
Cinema	1,4%	1,2%	0,7%	1,0%
Outdoor	8,9%	9,0%	7,3%	8,6%

Belgium used to be among those European countries (along with the UK, Germany, the Netherlands, the Scandinavian countries) in which the newspapers and periodicals enjoyed more income from advertising than any of the other media. Since 1998, however, television receives the larger part: 42,8% versus 36,6%.

The share of newspapers in advertising has declined but not drastically. Since 2002, the newspapers catch up with a modest increase in advertising income. The old analogue newspaper survives. In spite of the fact that so many new TV channels were launched, the income of TV advertising has gone down. Television has not succeeded in finishing off the newspaper as an advertising medium. The internet is growing but its share is still very limited and this since many years.

The loss of advertisement income remains problematic not only for newspapers but for the whole media market. It is unlikely that the advertising market will continue to grow. The audience to be reached is fragmented over so many media suppliers.

5.3 *Revenue from advertising of Flemish and French language newspapers*

Corelio (*Het Nieuwsblad* en *De Standaard*) has the highest share. De Persgroep's share is almost equal but if you count the total advertising income of all the Mediahuis newspapers together they have the strongest advertising position. In the French-language community, Rossel has a dominant position on the advertising market as well as on the readers market. We notice that the free newspapers Metro have a quite high share of the advertising market but we may not forget that it is their own source of income

Fig 16 Advertising income Flemish newspaper titles

Title	**Advertising income**
Het Nieuwsblad	€ 103.995.923
Het Laatste Nieuws	€ 102.954.675
De Standaard	€ 64.196.608
Belang van Limburg	€ 60.947.778
Gazet van Antwerpen	€ 56.967.861
De Morgen	€ 29.509.568
De Tijd	€ 17.754.964
Metro	€ 28.598.315
Total	**€ 465.225.692**

Fig 17 Advertising income French speaking Belgian newspaper titles

Title	**Advertising income**
Le Soir	€ 70.829.754
Sud Presse	€ 56.853.654
La Dernière Heure	€ 54.326.457
La Libre Belgique	€ 39.019.883
L'Avenir	€ 38.901.052
L'Echo	€ 10.108.070
Grenz Echo	€ 4.195.861
Metro	€ 32.325.919
Total	**€ 306.620.654**

Conclusions

It is correct that the circulation figures and the advertising income of the daily newspaper decline but not drastically. The audience of television is increasingly fragmented and TV advertising falls back more than that of the daily newspaper. Online versions of traditional newspapers enjoy high credibility. The loyal reader still cannot miss his traditional analogue newspaper and the advertisers still consider the newspaper as the most flexible and excellent medium. The internet is not a competitor but rather an ally. In the south of Belgium, the loss of readers is higher than in the north but the increase of the number of subscribers of French-language newspapers is a positive trend.

Newspapers have a unique selling position because they are the most important agenda setting-and watchdog media in our society. The government supports the role of the newspapers for maintaining our democracy through measures such as reduced postal rates and a zero rate of VAT.

Publishers will have to continue to modify their newspapers in a creative and innovative way so that they appeal to their readers' new life trends.

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Comment

The newspaper industry in Belgium: the French-speaking side

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We shall present here some of the particularities, advantages and handicaps of the French-speaking newspaper market in Belgium.

1. Ownership

Three press groups share the market of the press in the South of Belgium: Rossel, IPM and Editions de L'Avenir. Each group prints at least one newspaper (often two), most of them with various local editions (see fig. 1). These groups were all created by families, and two of them are still owned by families.

This situation is similar to that encountered in the North of the country, with the exception of the third media group: Editions de L'avenir. In the past, this company was owned by the bishop of Namur (with some local families). When the bishop decided to sell the group, it was first bought by the Flemish newspaper group Corelio (now Mediahuis). But, when Corelio and Concentra decided to merge to create the Mediahuis group, Corelio chose to sell its French-speaking component. Editions de L'Avenir is now owned by Nethys, a commercial subsidiary company of the Tecteo group. Tecteo has a very original capital structure since, behind Tecteo, we find an intercommunale, i.e. an association of municipalities. Hence, Tecteo, and therefore Nethys, depend ultimately on public funding. This does not prevent the group from developing its role in the media contents industry: pay-tv (VOO), formerly a radio network, newspapers (with Editions de L'avenir), but also investments in other media (see below).

Fig 1 : Ownership and titles

ROSSEL : Hurbain family (heirs of Rossel family)

- *Le Soir* [quality]
- *Sud Presse* [popular + regional]
- *Grenz-Echo* [German-speaking]
- Free daily press + weeklies
- 49 % of the free daily *Metro*

IPM : LE HODEY FAMILY (formerly: Brebart Family)

- *La Dernière Heure-Les Sports* [popular and sports]
- *La Libre Belgique* [quality]
- 50% of the Belgian Edition of the French weekly *Paris-Match*

L'AVENIR: NETHYS (TECTEO group) (formerly: bishop of Namur)

- *L'Avenir* [regional]
- Free daily press

In Belgium's French-speaking world, the fear of getting a duopoly newspapers market (as in Flanders) is not absent. But this hypothesis is unlikely because it seems that none of the players could benefit from it. If the French-speaking market had included only two companies, both acting on the quality and regional press sectors (as in Flanders), a purchase of a weaker group by the strongest one (Rossel) would have been possible. But each of the competitors of Rossel has a different configuration: IPM group has a quality newspaper and a sports and popular newspaper; the group L'Avenir is only in the regional press.

The purchase of IPM would have led to the disappearance of the second quality newspaper of French-speaking Belgium and to a monopolistic presence of Rossel in the area. It would have been the same in the area of the regional press in the case of a purchase of L'Avenir.

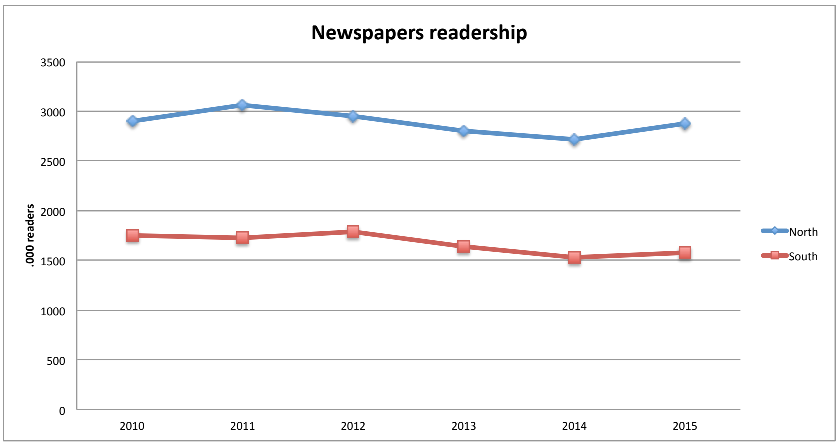
If we add to this the pressure of the political power, anxious to preserve a pluralist press, we can understand that the market players have chosen other development strategies (see below).

2. Readership

In Belgium, the Flemish population being larger the Francophone population (about 60% versus about 40%), it is normal that the amount of newspapers sold in Flanders should be higher than that of newspapers sold in French-speaking Belgium. However, in actual fact, the difference in newspaper circulation is not proportional to the difference in population. In 2009, newspaper circulation in Flanders represented 68% of total circulation in Belgium. In 2015, it was 72%. The difference shows that the population of this part of the country reads, on average, more newspapers than the French-speaking one, and that, over time, the Francophone population buys less and less newspapers, whereas the Flemish population continues to appreciate them.

Data concerning readership confirm the results of the circulation analysis, though with a slight difference. Between 2010 and 2015, the number of "regular readers" of newspapers varied only slightly in both the North and the South of Belgium (fig. 2). In Flanders, in 2010, readership surveys estimate that newspapers are read every day by slightly less than 2.9 million inhabitants. Roughly the same figure is mentioned in the surveys in 2015. In the South, readers were 1.75 million in 2010 and 1.6 million in 2015. In the South of the country, the number of readers does not decline in the same way as circulation (see below).

Fig 2



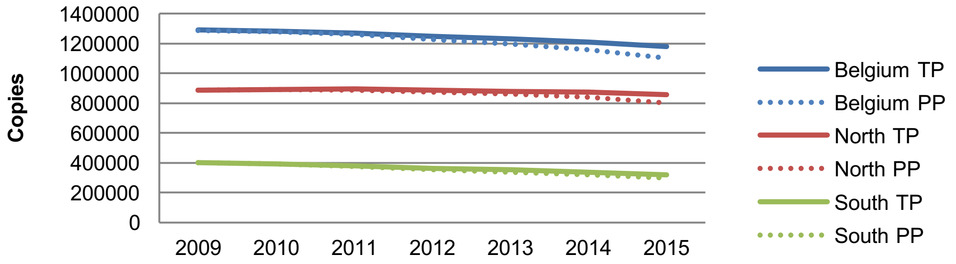
(source: CIM)

Readerships surveys confirm that the Flemish population not only buys more newspapers, but also reads them more than the Francophone population, and that this trend increases with years. In 2010, 37% of Belgium's regular newspaper readers read Francophone newspapers. They were 35% in 2015.

3. Circulation

While the number of readers of newspapers in the South of Belgium appears to be rather high and stable, the circulation of paid newspapers does not follow the same trend. Circulation of newspapers in the Southern part of the country is not doing well. Compared with Flanders, where total paid circulation (print + digital) has not varied significantly since 2009, in the South, the total circulation dropped from about 400.000 copies a day in 2009 to less than 300.000 in 2015 (fig 3.).

Fig 3: Total Paid and Paid Print Circulation



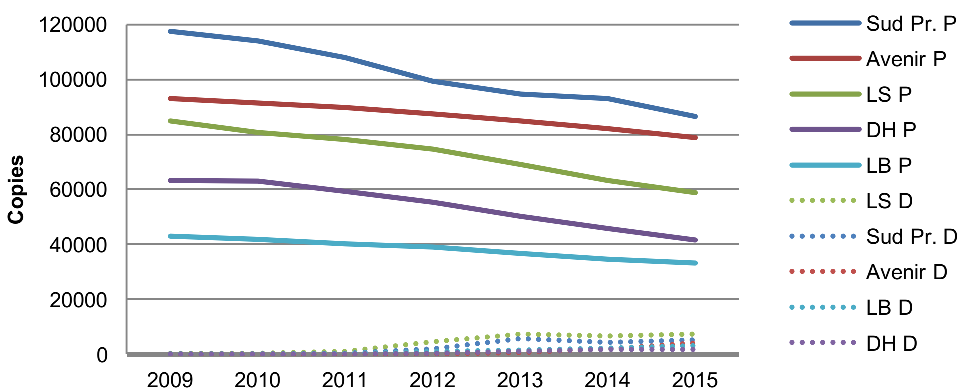
(source: CIM)

In both the North and the South, the main problem met by newspaper companies is the same: they all try to stem the decline of their print circulation. Sometimes, the decrease is partially offset by digital sales and subscriptions. But in most cases, the amount of paid digital circulation is still very low and cannot replace the loss of print sales. In the North of Belgium, the stability of circulation of newspapers (see fig. 3) is due to the compensation of losses in paper sales by digital sales. In the South, total paid circulation is low because digital sales do not compensate the loss.

If we take a look at the individual situation of each newspaper (fig 4.), it clearly appears that the paid print circulation of all French-speaking newspapers is falling. The decrease did not begin in 2009, but over this period, it is rather huge: for most titles, it exceeds 20% of the circulation in six years, with the most important newspapers not being those with the largest decrease. Between 2009 and 2015, the popular sports newspaper La Dernière Heure (DH in fig. 4) lost 35% of its paid print circulation. Quality newspaper Le Soir (LS in fig. 4) lost 26%, popular newspaper Sud Presse (SudPr. in fig. 4) 24% and quality paper La Libre Belgique (LB in fig 4.) 21%. The only newspaper with a small loss is L'Avenir (Avenir in fig. 4) with a 14% lost.

In comparison, the amount of digital paid circulation (dotted lines in fig. 4) is in each case very small.

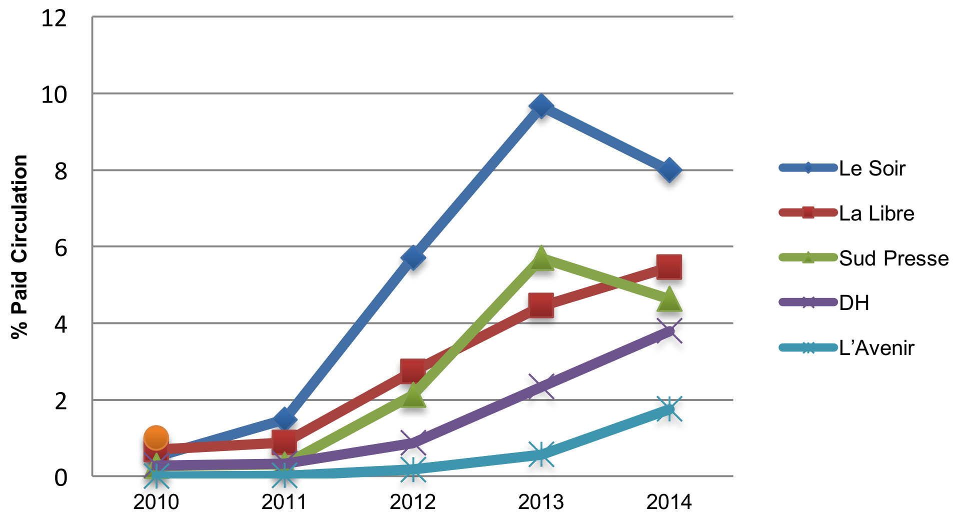
Fig 4: Paid Print and Digital Circulation



(source: CIM)

As shown in fig. 5, the only newspaper with a percentage of digital circulation around 10% in 2014 was the quality paper Le Soir. For all titles, the percentage of digital circulation is growing, but is still very low. In 2015, for all French-speaking newspapers, the total percentage of digital circulation was around 7% of total circulation (about the same as in Flanders). Slowly, the part of paying digital readers is growing, but remains very low in comparison with readers paying for print newspapers.

Fig 5: Digital circulation (percent of total circulation)



(source: CIM)

4. Readership and circulation

As previously said, the number of readers of newspapers in the South of Belgium seems to be rather high and stable while the circulation of paid newspapers falls each year (in contrast to the North, where it remains constant). The difference between these two trends is so striking that, if we combine the two variables, each newspaper sold in the South of Belgium should have been read by five people or more. This is not plausible.

In order to understand this paradox, we need to keep in mind that a large proportion of the people declaring in the official readership survey that they have read a newspaper the day before do not mean that they bought it (printed or digitized), but that they have had a contact with it, in many cases only through a connection with the free web pages of the newspaper. Estimating the actual paying readership of each publication is therefore very difficult, and almost all concerned now agree that the readership surveys measure mainly the reputation of each newspaper. Since 2013, these surveys also include a study of the audience "all brand", which is more correct.

Of course, this apparent paradox is not a peculiarity of French-speaking Belgium, but it plays a more important role in a market where consumption of paid newspapers is decreasing.

5. Readers strategies

Newspapers companies of French-speaking Belgium now try to catch a part of their "free readers" and to convert them into "paying readers". They therefore develop very specific strategies. Since very recently, all French-speaking newspapers practice the "pay wall" method, which allows customers to read free of charge only a few articles, or give them access to only the first lines of an article, inviting the reader to pay in order to discover its entire content.

It is too soon to appreciate the impact of this "pay wall" method on the selling of digital subscriptions. But, after more than 15 years of the "all free" policy of access to contents adopted by almost all the printed media in the world, this turn shows that, in the South of Belgium as elsewhere in the world, companies have decided to change course.

Unlike Flemish companies, French-speaking newspaper groups also offer very cheap prices to their potential web clients if they choose to become digital subscribers and, instead, rather expensive prices if buyers decide to pay for a print + digital subscription. Compared with Flanders, all the digital prices of French-speaking newspapers are lower, while the prices asked for a print + digital subscription are higher.

This policy aims to increase as quickly as possible the proportion of paid digital circulation, whose production costs are lower than those of the print version. Newspaper managers may also hope than some readers will give up print subscription and move to digital. However, it is for the moment unrealistic to believe that this kind of promotional prices could accelerate significantly the trend to a full "only-digital" model. For many years, print and digital will continue to coexist, with all the financial difficulties related to the obligation to produce at the same time different media products.

French-speaking newspaper companies know also that their audience is not mainly interested in local products, unlike Flemish readers. They are aware that a large part of the French-speaking population of Belgium looks gladly to French news and French media. This attitude does not concern directly the daily press, but has a great impact for weeklies, monthlies and the audio-visual world. The French media are strongly present in the South of Belgium, even to the point that some French publications have decided to print special "Belgian" editions, mixing French and Belgian contents.

Regarding the television industry, the impact of French television channels is even more important. On average, each day, about 30% of Belgian French-speaking viewers watch French stations (mostly on access prime time and prime time). Hence, in the South of Belgium, competition comes not only from within, but also (and sometimes mostly) from outside.

6. Media strategies

More than on the Flemish side, newspaper companies have understood that they have to find money and to develop outside of the newspaper market. And they did. Sometimes, it now looks as if newspaper production has become only a tiny branch of their activities.

Until the purchase of L'Avenir by Tecteo-Nethys, Belgium's French-speaking newspaper groups were all involved in audio-visual activities. They were all partners of the private television RTL-TVI via shares in the company. Rossel and IPM are still shareholders of this private television group, but the stocks of L’Avenir remained in the hands of its former owner, the Flemish group Corelio. The same occurred in the radio sector: stocks owned by L’Avenir in the radio group Nostalgie still belong to Corelio, while Rossel is involved in Bel-RTL radio stations and IPM in its own radio network.

All groups are also involved in web activities and services, and try to develop them. In this regard, we must point out that the IPM group now owns several web companies acting outside the media sphere (in real estate, bets and games). The group draws henceforth a significant share of its revenues and profits from these activities.

Even though Rossel is also active on the Internet, its most important development pole concerns the regional press in France. While owning the newspaper La Voix du Nord (Lille), it also purchased other newspapers in the North of France and created and developed a lot of companies and activities around the newspaper La Voix du Nord. The group also tried many times to purchase other regional newspaper companies, but until now without success.

This is not the case of the Nethys group, which was totally outside the newspaper business before buying L’Avenir. The fact that a company originally of a public nature purchases a newspaper group confirms the political interest in maintaining pluralism in society, as explained in the introduction. (Initially, Tecteo was an association of municipalities in charge of distributing electricity and cable television.) After the purchase of L’Avenir, the company confirmed its interest for printed media by buying two television weeklies, and then by taking stakes in French regional newspapers, like Rossel but in the South of the country (La Provence, Nice Matin).

Both press companies intend to develop their activities in France, aiming to own the first regional press group in this country, Belgium being too small to fulfil their ambitions.

7. Difficulties and conclusion

In their development plans, newspaper companies of Francophone Belgium also need to take into account the second side of their revenues: the advertising market. While advertising remains one of the last “national” economic sectors in Belgium, where coupled (Dutch-French) space sales are often proposed to clients, it must be admitted that advertising revenues flow less to French-speaking media than to Flemish media. Studies show that revenues for the Southern part of the country are below the share of the French-speaking culture in the country. And this trend increases year after year, in such a way that the French-speaking market is often considered a “residual market” by both advertisers and their clients. The economic situation of the Southern part of the country, the image of some parts of Wallonia and certain political discourses are probably no stranger to this.

Newspaper companies also need to take into account the specific media uses of Southern Belgium: less digital equipment than in the North, less time spent on the internet and social media, more time devoted to radio and television than in the North (the opposite of the use of the written press)… It is obvious that Belgium is at the confluence of two Europes: Northern Belgium uses media in about the same way as northern countries of the European continent while Southern Belgium is closer to southern countries.

The size of the market, as mentioned before, is another pitfall for the French-speaking newspaper companies. The French-speaking population is not large, and recipes applied in large markets are not easily replicable in this part of the country. Flanders is somewhat larger, and might encounter the same difficulties. However, it is clear that it is not the case, or at least not in the same proportion.

This confirms the diversity of culture and media uses of Belgium, as well as the diversity of economic situations, which can sometimes be an advantage. In the case of Southern Belgium, however, they are often a handicap.

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