WHERE ELSE IS THE MONEY?
A study of innovation in online business models at newspapers in Britain's 66 cities

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Much like their counterparts in the US and elsewhere, British newspaper publishers have seen a sharp decline in revenues from traditional sources – print advertising and copy sales – and many are intensifying efforts to generate new income by expanding their online offerings. A study conducted in summer 2008 of the largest-circulation newspapers in the 66 cities in England, Scotland, Wales and Northern Ireland showed that while only a small minority (3 newspapers or 4.54%) did not have companion websites, many of the publishers who do have an online presence have transferred familiar revenue models online (98.41% of the sites carried advertising and 19.05% offered subscriptions to online versions of their papers). It has also been recognised that income from these sources are not enough to sustain current operations and innovative publishers have diversified into additional broad categories of Web business models, which are described as: brokerage, infomediary, merchant, manufacturer (direct), affiliate, utility and community. Significantly, this exploratory study did not only compare the approaches of various news publishers with each other, but it also considered how active newspaper publishers were in taking advantage of the variety of business models generally being employed on the Web – and which opportunities were ignored.

KEYWORDS   British newspaper websites; innovative online new publishers; online business models; online newspaper business trends

Introduction

The newspaper business has never been simple, but the business model has typically been straightforward: compile news and information for which readers pay in time and/or money, and then also sell their attention on to advertisers looking to connect with customers.

Until not so long ago, that approach proved pretty robust, allowing publishers to routinely post profits in excess of 20 percent (The Economist 2009). No longer.

The industry's health, under pressure since advertising share started slipping in 2005 (Kirwan 2009), continued to worsen in 2008 in what the UK Newspaper Society's then president, Michael Pelosi described as, "the most challenging economic times of the past 50 years" (Newspaper Society 2009a). Circulation, advertising revenues and profit margins all fell – and in many instances took staff numbers and even entire operations down with them.

In November 2008, Trinity Mirror Ltd (TML), Britain's largest regional publisher, announced they would be cutting 1200 jobs, closing 44 titles and freezing pay across the

company (Oliver 2008). A few weeks later, TML and Johnston Press, the country's second-largest publisher of regional newspapers, were dropped from the FTSE250 as their share prices crashed, losing around 90% from their three-year highs (Tryhorn 2008).

The prognosis is grim. Leading UK industry analyst Clare Enders in December 2008 predicted that that up to a third of the nearly 1300 regional[1] newspaper titles will shut in the next five years making 10,000 people redundant (McNally, 2008); six months later, she revised her forecast downwards. In June 2009, Enders told a parliamentary select committee investigation into the future of local radio and newspapers that she expected that as many as one in every two papers may fold by 2014 (McNally 2009).

In a speech to a media convention earlier this year, then culture secretary Andy Burnham (2009) described what he saw as the industry's key challenge:

The old media world has ended – and the sooner we say so the better. With it must go old thinking. But the difficulty we all have is this: it doesn't yet feel like an era of new possibility, and change we can all believe in, but one of threat and decline. My main message today is: we need to break out of this thinking and we can – but only if we look beyond our own backyards and see the bigger picture. (Ibid:1)

That UK regional newspapers needed to do so (look beyond their 'backyards' and consider new ways of thinking about their business models, that is) is clear. That they also intended to do so is suggested by the upbeat headline to the news release announcing the Newspaper Society's annual report for 2008-9: "Local newspapers evolving into successful multimedia businesses." (Newspaper Society 2009).

Just how they are going about that – and to what extent these activities could be considered indicators of a "new way of thinking" – is the subject of a longitudinal study that commenced in the summer of 2008. Findings from the first exploratory cycle of that investigation are reported here, preceded by a brief review of the context and critical perspective and the methodology.

Critical perspective in the context of UK regional newspapers

Researchers have pointed out that while few concepts in business today are as widely discussed as the concept of business models, it's also a concept that is often misused (Picard 2000), poorly understood, particularly in context of the Web[2] (Rappa 2000), and seldom systematically studied (Weill et al 2004).

The term 'business model' is often confused with that of strategy (Picard 2000), which is the means employed by firms to meet their goals (Grieve & Smith 1990; Karlöf 1989). On the other hand, while a generally-accepted definition and classification of business models does not exist (Fetscherin & Knolmayer 2004), a business model is typically conceived as more fundamental than a strategy.

Slywotzky (1996), for example, defined a business model as the entire system for delivering utility to customers and earning a profit from that activity, while Timmers (1998), perceived a business model as the architecture for product, service, and information flows. Trombly (2000) defined an e-business model as an approach for conducting electronic business through which a company can sustain itself and generate profitable revenue growth.

Researchers have witnessed all kinds of business models and various investigators have suggested different schemes to classify them (Geoffrion,1998; Rao, 1999; Timmers, 1998; Trombly, 2000; Rappa, 2000; Fetscherin & Knolmayer 2004). Yet we still lack a definitive taxonomy. As a consequence, a number of competing taxonomies exist today,

constructed from different perspectives (Wang & Chan 2003). This creates confusion for both scholars and practitioners alike.

Another obstacle in classifying online business models is that many are still evolving, changing rapidly and dynamically (Wang & Chan 2003). Evolving online business models may render the taxonomy of today obsolete tomorrow. For example, Amazon.com started as a bookseller, but now it facilitates transactions around an array of merchandise, including providing price comparisons with other retailers and facilitating sales for those third parties, something that is inconceivable in a traditional business model.

Those wanting to understand the range of perspectives on businesses models are advised (Chaharbaghi et al 2003, Picard & Dal Zotto 2006), to step back from the business activity itself to look at the basis and the underlying characteristics that make commerce in the product or service possible.

Chaharbaghi et al (2003) argue that an essential first step is to acknowledge that the models we employ are rooted in the underlying assumptions and context which govern their creation: "It is this relationship that determines the meaning, legitimacy and impact of models" (p.372).

The researchers observe business model waves which they liken to Khunian paradigm shifts, where "a series of peaceful interludes [is] punctuated by intellectually violent revolutions" (Kuhn 1996 in Chaharbaghi et al 2003: 372). They note that in both science and business one conceptual worldview periodically replaces another and that, "as with all successful business model waves, what emerges is a view on how best to conduct business, an ideal, which promises a panacea to current business developments and pressing problems" (ibid).

Against that background, Chaharbaghi et al (2003) make the case for a meta business model comprising of three interrelated strands, which are: [1] the way of thinking; [2] the operational system; and [3] the capacity for value creation. The researchers caution that while the distinction of each is essential for explaining the concept of business, using each of these strands "will lead to a dead end" (Chaharbaghi et al 2003: 375).

With that in mind, an exploration of the changing business models of newspapers would need to consider not only the activities in which the companies are engaged, but also the mindsets that inform them and the outcomes of those efforts.

In the context of the newspaper industry in the UK, the struggle between the "old way of thinking" which Burnham (2009) said underpinned the "old media world" and a new way of thinking that would bring about a "new media world" centres on assumptions about whether the Web is a revolutionary force, or merely an important, but merely evolutionary influence.

Picard (2000) articulated the debate:

Many believe the rhetoric that new and unique products and services are being created that will significantly alter the behaviour of individuals and transform society. In reality, most of these products and services are just creating faster, easier, and more flexible means for consumers to do what they are already doing. (p. 61)

Picard (2000) also noted that the innovations, whether anticipated or actualised, were restricted by the capacity of the technology:

These changes, and particularly the interactive possibilities that permit users to select materials and the forms of that material, create a significantly different relationship that exists between users and traditional media. But, given the existing technologies and the technologies currently in development for media and

multimedia, that interactivity is fairly limited to making more effective use and personal choices based on already existing content forms or combinations of those forms (p. 60)

Significantly those comments were published in 2000, not long after a count of the total number of weblogs turned up 23 (Blood 2000) and the year before the launch of Wikipedia and the so-called dot.com crash in 2001. That was almost three years before Google launched Ad Sense in June 2004 and Tim O'Reilly popularised the term Web 2.0 at a conference that October (O'Reilly 2005).

While various definitions exist, the Web-as-information-source view is generally considered Web 1.0, while the Web-as-participation-platform captures many of the characteristics associated with the Web 2.0. Web 1.0 is also generally associated with 'old thinking' about the Web, while engaging with Web 2.0 applications could be considered evidence of 'new thinking'.

Seen from an editorial perspective, the change has been described as re-visioning news as a conversation, rather than a lecture (Gillmor 2006), a metaphor that also recalls a time before the industrial mass distribution of news through the printing press (Nel et al, 2006). The dialogical model challenges the familiar broadcast model of journalism which emphasizes one-(or few) to-many communication flow with little feedback between the source (or journalist) and the receiver (or audience) and relatively anonymous, heterogeneous audiences (Pavlik 2000).

These opposing perspective also underpin what UK media analyst Peter Kirwan (2007) saw as divergent views on the fortunes of the UK regional press coming from the 'The Cyclists' and 'The Structuralists'. For both camps, a key question was the future of advertising, which had typically provided the lion's share of revenues for UK regional papers (Newspaper Society 2004, 2005, 2006, 2007). The Cyclists were said to have seen the downturn as a consequence of cyclical changes in the economy, while Structuralists considered it to be the result of structural changes in the business context brought on by the Web (Kirwan 2007). Structuralists do not only see the Web as facilitating the expansion across multiple channels of newspapers' traditional role as an information gatekeeper - between news consumers and news sources, as well as commercial enterprises and their customers. They do not see the Web as only allowing more of the same – more of the same news and information reaching more people, more often, across more platforms, which provides more inventory around which to sell more advertising and, in some instances, more opportunities to sell existing content. The "new thinking" Structuralists are of the view that the Web's ability to facilitate interaction creates a markedly different relationship between users and traditional media, as well as amongst users and that, as result, there is a need to re-imagine the value propositions that the newspaper companies offer and the operational systems that deliver them.

Change is, of course, a process. So too is the transition from "old thinking" to "new thinking" about revenue models.

In "New Revenue Strategies" report (Stone 2006) from the World Association of Newspapers' (WAN), Shaping the Future of the Newspaper project, the psychology of media companies about the Web is said to have reflected the "predictable two- to five-year [four-stage change] cycle" described by Scott and Gaffe (1990) - denial, resistance, exploration and commitment:

First, publishers reject the new idea, in this case, the development of a new media business. Then, resisting *developing online advertising strategies* [emphasis added], but perhaps allow some dabbling in them. Then, convinced a revenue

stream exists, publishers change gears and accept the new orientation, and finally become completely engaged in the new business when the medium proves itself as a moneymaker (p. 10).

Significantly, the introduction to that report seemed to imply publishers varied in their views about the extent to which "new revenue" would come from activities on new channels, i.e. the Web, but not necessarily that such revenues could come from new activities, i.e. revenue streams other than advertising.

While researchers have identified evidence of alternative thinking in practice (Krueger & Swatman 2004, Herbert & Thurman 2007), the dominance of this perspective in industry is further illustrated in the "Envisioning the Newspaper 2020" report that WAN published in November 2007, in which 22 thought leaders were asked to predict the future of the industry. The essay by Jeff Jarvis, described in the report (Stone 2007: 5) as "blogger at Buzzmachine.net and head of the interactive journalism program at City University of New York" [who is also a columnist and consultant for The Guardian, UK], is entitled, "News organisations will be built on large advertising networks in 2020" (p 45).

Studies into the online business models of UK regional publishers are limited. Thurman & Herbert's (2007) investigation of selected national and two large regional "online newspapers" showed that while heavily reliant on advertising, some publishers were starting to explore other online revenue streams. Industry reports suggest these practices have not been widely diffused across the regional press.

An annual survey by the Newspaper Society (UK) has, since 2003, tracked online and offline revenue streams for the publishers of the country's nearly 1300 regional newspapers. In 2003, advertising/sponsorship accounted for 73.5% of turnover, was followed by circulation sales with 14.2%, contract printing with 5.0%, and leaflets with 2% and 'Other' with 3% (Newspaper Society 2005). Other offline revenues (3%) included photo sales, training, rent, canteen, waste sales, editorial syndication and telephone promotions. Internet advertising accounted for 1.4% of the total advertising revenue, which was more than 97% of total revenues from online/internet; "Internet publishing" accounted for the rest (2.8%).

By 2007, the contribution of advertising/sponsorship and circulation had dropped to 68.7% (down 6.53% in relative terms) and 13.2% (down 7.04% in relative terms), respectively (Newspaper Society 2008). Revenue from contract printing had more than halved, down to 2.2% from 5%. The contribution of additional categories more than trebled from 3% to nearly 10%, with promotions (0.4%), events (0.2%) and audiotext (0.2%) being highlighted. In the same period, Internet advertising had more than quadrupled to contribute 4.9% of total advertising; no revenues from Internet publishing or any other category was reported.

In order to contribute to the growing understanding of the Web activities of the UK's regional press, in general, and the extent to which they reflected the 'new thinking' about mass communication and business models, in particular, a longitudinal study of the companion websites of regional newspapers in Britain commenced in the summer of 2008. This paper draws on selected findings to address the following research questions:

RQ1: What revenue streams are featured on the companion websites of regional newspapers?

RQ2: Which online business models are the regional publishers not engaging in?

RQ3: To what extent could these activities be considered to reflect 'new thinking' about the Web?

Method

To get insight into how regional newspapers across the UK were engaging with the Web, it was decided to employ limited resources to construct a purposive sample comprising the companion websites of the largest circulation newspaper in each of the country's 66 cities listed on UKCities.com. These range in size from London, population 7,172,091 to Ely, population 15,102 (ONS 2001). Details of newspapers in England (50 cities), Scotland (6) and Wales (5) were taken from the Newspaper Society database (nsdatabase.co.uk), while the Audit Bureau of Circulation data was used to identify the newspapers in the 5 cities of Northern Ireland. We aimed to identify the paid newspapers with the highest circulation for each city. Where there wasn't a paid newspaper, we used the highest circulating free paper and if there was neither, we used the highest circulating newspaper that covered the city (for example, The Ulster Gazette for Armagh). We defined 'companion websites' as sites on which the print product enjoyed significant presence, i.e. beyond a simple listing on a corporate site or group news portal.

As the research aimed not only to identify the online business models the news publishers were employing but also to note areas that remained unexplored, it was decided to reference the taxonomy of general online business models identified by Rappa (2001), who observed 41 distinct configurations of value streams, logistical streams and revenue streams that he grouped into nine categories: Advertising, Brokerage, Infomediary, Merchant, Manufacturing, Affiliate, Community, Subscription and Utility. Mindful of Rappa's (2000) point that the Internet continues to evolve and that "new and interesting" variation can be expected in the future, the researchers were guided, but not limited to, Rappa's models.

The data was collected between the 28th July and the 31st August 2008 by two coders. The findings were compared and any variances were investigated and resolved.

The findings were analysed using simple descriptive statistics; as the number of sites studied was small and the sample was not random, more sophisticated statistical measurements were not viable here.

Findings

The newspapers in the 66 cities used for the research were owned by 16 publishers (See Appendix 1). Of those, only Scottish Provincial Press, Alpha Newspaper Group and Edward Hodgett Ltd are outside of the top 20 UK regional newspaper publishers. The top four publishers – Trinity Mirror, Johnston Press, Newsquest and Northcliffe – owned 51 (or 77.27%) of the sites surveyed.

Though a newspaper's brand is thought to be a valuable commodity, there was no single approach to brand extensions online. Three approaches to the sites were noted: mirror websites, portals and online brochures. The print newspapers titles were clearly mirrored on 59 (or 89.39%) of the sites, such as www.liverpoolecho.co.uk, although some also chose a common abbreviation, such as www.lep.co.uk for the Lancashire Evening Post.

News portals, which aggregated news from several newspapers of a group (e.g. WalesOnline.co.uk that hosts the news of the Cardiff daily, the South Wales Echo and 11 of Trinity Mirror's other South Wales newspapers) accounted for 1 (1.59%) of the sites. Where the newspaper had no significant presence on the larger site beyond being listed, the paper was deemed to simply have an electronic brochure and was discounted from the audit. Two papers fell into this category: The Wells Journal, part of the Mid Somerset Series hosted on www.thisissomerset.co.uk, and The Ely Weekly News, listed on

www.cambridge-news.co.uk along with the Cambridge Evening News, which was also included in the audit.

Only one newspaper did not have any website presence at the time of the audit, the London Informer.

Business models have been defined and categorized in many different ways and some taxonomies of business models employed by online publishers are beginning to emerge (Krueger & Swatman 2004, Knolmayer & Fetscherin 2004, Herbert & Thurman 2007, Sylvie 2008).

Advertising and Sponsorship Models

While advertising has been the primary form of online revenue for regional publishers, their share of that market has been tiny. In 2007, online advertising revenues accounted for 4.9% of total advertising revenues for regional publishers, but that income (£137 million) was only about a third of one percent (0.035%) of the total spent on UK online advertising (£2,812.6 million) (Newspaper Society 2007, IAB 2008).

The extent to which publishers took advantage of the evolving variety of online advertising opportunities varied. Traditional forms of advertising featured prominently, but few publishers were exploiting new technologies that are fast becoming central to the Internet users' online experiences.

All but two of the sites (61 or 97%) carried external display advertising and 57 (or 90.48%) offered classified advertising on the site. Few publishers were taking advantage of the additional advertising inventory that multimedia provided. Video material was available on most of the sites (56 or 88.89%), but only video from one of the sites carried internal commercial messages (a pre-roll sponsorship). Links under the tag, "Sponsored Links", appeared on 30 (47.62%) of the sites.

While display and classified formats dominate advertising revenues for print products and their companion websites, they account for much less than half of total online revenues. According to an annual study by PricewaterhouseCoopers and the Internet Advertising Bureau, display advertising made up 21% of UK online advertising during 2007, while classified accounted for 20.8% (IAB 2008).

Search engine-generated advertising, which allows for contextual advertising by making an editorial system communicate with software that allows for the placement of text-based or tagged advertisement on the website, is by far the largest advertising format online. In 2007, search engine advertising accounted for 57.6% of the market and revenues grew 39% from the previous year to £1,619.1 million (IAB 2007, IAB 2008). For publishers, major search engines such as Google and Yahoo, which dominate search advertising, have been seen to represent a threat to newspapers' control of their content (Stone 2007). However, more than half of the sites audited (33 or 52.38%) had agreements with Google and Yahoo.

While just over a third of the sites (39 or 61.90%) offered e-mail newsletters, few were drawing revenue directly from these activities: there was no charge for any of the e-mail newsletters and very few of those (5 or 7.94%) carried advertising or sponsorship. Still a relatively new area in the IAB study, this format, described as solus-email marketing, accounted for 0.6% (£16.2million) of total UK online advertising spend in 2007 (IAB 2008). All the newsletters had internal links, suggesting the primary benefit would draw readers back to the main websites.

Driving traffic was also the likely strategy behind the use of RSS (Real Simple Syndication) Feeds, which are web feeds used to publish frequently updated information. Such feeds were available on more than three-quarters of the sites (76.19% or 48) of the

sites reviewed. While the feeds can be both a vehicle for content and advertising (Bellam 2007), none of the feeds reviewed offered commercial messages. None of the sites sold subscriptions to their RSS Feeds.

Subscription & Utility Models

Setting a price for online content has perplexed commercial news publishers since the early days of their involvement in the Internet, starting before the World Wide Web was widely introduced (Picard 2000). Along the way, publishers have experimented by building paywalls around all or some of the content and varied charges by type, volume or time. Rappa (2001) distinguishes between two models, describing subscription models as those where fees are paid irrespective of actual usage rates, while utility models (also called on-demand or pay-as-you-go models) are based on metered usage.

None of the websites in the audit charged users a periodic – daily, monthly or annual -- fee to access the general content on the site. However, 57 (90.48%) required registration to access certain features and/or content such as receiving newsletters or posting comments on articles.

Paid-for subscriptions to digital facsimiles of the newspapers was available on 12 (19.05%) of the sites, while 7 (11.11%) offered free access to digital facsimiles of branded supplements. One paper, the Newsquest-owned St Albans Review offered a free version of a two-day-old edition of the paper, including supplements. Those pages did not carry any additional advertising.

Though companion websites have traditionally been seen as way to drive sales of the print product (Herbert & Thurman 2007), of the sites audited only 23 (36.51%) allowed a subscription to the newspaper to be purchased online. The remainder directed the potential purchaser to call a subscription hotline number or forward an email - or did not offer any option at all to try and purchase a subscription.

Infomediary Model

Publishers have long recognised that data about their readers and their consumption habits are valuable, especially when that information is carefully analysed and used for target marketing campaigns. On the other hand, independently collected data about producers and their products are useful to consumers when considering a purchase. Rappa (2001) categorizes those who function as information intermediaries, assisting buyers and/ or sellers understand a given market, as "infomediaries" and identifies the following types: advertising networks, incentive marketing and audience measurement services.

Advertising Networks, which feed ads to a network of member sites, thereby allowing advertisers to deploy marketing campaigns was identified on 37 (58.73%) of the sites in the audit. The most prominent of these was the Fish4 brand, established in 1999 as a joint effort of 6 regional press groups and 9 independent publishers but which is now owned by only two of the original partners, Trinity Mirror and Newsquest. The strategies of the former Fish4 partners varied. For example, Johnston Press established the "Today" – branded network (e.g. JobsToday), while the network featured on Newsquest's sites were not additionally branded. The extent to which independent publishers used 'white label' networks was not immediately obvious.

Incentive Marketing activities, such as loyalty programmes that provided readers with discounts or vouchers for making purchases at associated retailers, was found on 17 (26.98%) of the sites. The majority of the sites, 57 (90.48%), also collected data from

users that could potentially be sold on for other targeted advertising activities. Such activities earned the regional press £1,866 million in 2007 (Newspaper Society 2008).

About 43% of the sites (27) could be described to be what Rappa (2001) calls a "Metamediary": one who facilitates transactions between buyers and sellers by providing comprehensive information and ancillary services, without being involved in the actual exchanged. These sites use databases (credit cards, loans, utility bills etc.) that provide independent comparative information on credit card rates, loans, utility rates and the like and then also offer up-sell opportunities (such as company logos and links) to the companies featured. Metamediaries differ from catalogues in that companies are featured regardless of whether they choose to take advantage of the "upsell" proposition or not.

The extent to which publishers were reselling their online audience measurement data to other businesses was not discernable from the audit.

Merchant Model

Merchants are described by Rappa (2001) as wholesalers and retailers of goods or services with sales based on list prices or through auctions. Almost a third (19 or 30.16%) of the sites audited cooperated with an "e-tailer" or virtual mall, such as shoppersworld.com.

Affiliate Model

Rappa (2001) distinguishes between the merchant model and the affiliate model, which rewards partners on a pay-per-performance basis. Just over 58.73% (37) of the sites were seen to have active affiliate deals, including premium rate horoscope services and a will writing service via an external local solicitors firm. The single most popular affiliate deals that were obvious at the time of the audit were in travel, with 7 (11.11%) sites offered branded reader holidays.

Broker Model

Brokers are market-makers: they bring buyers and sellers together and facilitate transactions. Brokers play a frequent role in business-to-business (B2B), business-to-consumer (BC2C), or consumer-to-consumer (C2C) markets. Usually a broker charges a fee or commission for each transaction it enables. The formula for fees can vary. While some publishers were affiliated with broker services, such as online mortgage brokers, from the audit it was not clear if these relationships extended beyond affiliate and advertising models to provide payment mechanisms for buyers and sellers to settle a transaction on which the broker would get a commission.

Manufacturer Model

While publishers' typically acted as intermediaries, they were also taking advantage of the web's power to allow a manufacturer to reach buyers directly, thereby compressing the distribution channel.

Publishers were manufacturing additional online content beyond that available in paper - videos (56 or 88.89%), podcasts (22 or 34.92%), e-mail newsletters (39 or 61.90%), and blogs (36 or 57.14% had blogs written by reporters; 43 or 68.25% had blogs written by members of the public or other external authors) – which potentially provided additional advertising and sponsorship inventory. However, very few were selling the new

content directly: 11 (17.46%) sold video content, allowing readers to download the content to their mobile phones, while two sites one (**1**) sold CDs, which they had produced. At the time of the audit, only the Scotsman.com site, which incorporated the Edinburgh Evening News, had a paid-for digital archive.

Almost half of the sites (29 or 46.03%) sold brand-integrated content which, in contrast to sponsored-content (i.e. the advertising model), is created by the company itself for the purpose of product placement. However, inventory was very limited, with the branded calendars being the most common items.

Community Model

The Internet is inherently suited to community business models as it does not only afford newspapers the opportunity to develop new and different relationships with readers, it also opens up the possibility of fostering relationships amongst current and would-be readers, sources and commercial customers. The viability of the community model depends on user loyalty and revenues streams can come from a variety of sources. Rappa (2001) identified the key ones as: sales of ancillary products and services; voluntary contributions; contextual advertising; and subscription to premium services.

A prerequisite of the community model is, of course, that participants need the tools with which to interact. With that in mind, the audit explored the extent to which the publishers enabled interaction both with and amongst users on their news sites, as well as off the sites. The research also considered the extent to which users were given opportunities to contribute their own original content.

Onsite interaction about news content through user comments posted directly below stories featured on 46 (or 73.02%) of sites and 37 (58.73%) hosted discussion forums or notice and message boards. Also popular were reader polls, which were featured on 42 (66.67%) of the sites and interactive games and/or quizzes, which were featured on 29 (46.03%) of the sites.

In addition to asynchronous communication, two sites (3.17%) were facilitating synchronous communication through scheduled Webchats, using instant messaging software.

The vast majority of sites, 53 (or 84.13%) also helped readers to engage with the content offsite by providing email forwarding functions and 41 (65.08%) sites included of social bookmarking applications, such as del.icio.us, Digg and Reddit.

Some newspapers were also engaging with users on other social networking sites: 8 (12.70%) had a presence on Bebo and the same number featured on MySpace, while 22 (34.92%) had Facebook pages. Interestingly, only three sites carried both Bebo and Facebook (Worcester News, Plymouth Herald and Wakefield Express) and all three are owned by different publishers, Newsquest, Northcliffe and Johnston Press. None of the sites were seen to be active on Google Groups. YouTube was being used by 22 (34.92%) sites and 6 (9.52%) had a presence on the photo-sharing site, Flickr.

Twitter was being used a small number of the sites: 8 (12.70%) had a general news feed on Twitter, while 5 (7.94%) had a specifically themed feed (i.e. entertainment or sport). Only 3 (4.76%) feeds from individual journalists were found.

In addition to interactions around content produced by the news site, sites were also soliciting original content from users. Rappa (2001) identified this as an "Open Content" strategy (after open source programmes created through collaboration by software developers). The most popular platform for user-generated content was blogs, with external authors blogging on 43 (68.25%) of the sites; almost three-quarters of these blogs, 46 (73.02%), allowed comments on these blogs. Users were able to contribute

video to 37 (58.73%) sites and 36 (57.14%) sites had user-generated photo galleries. Audio contributions by users were much less popular featuring on only 3 (4.76%) of the sites.

Social Networking around specific interests was also facilitated. The most popular of these were affiliations with dating services, such as DatingDirect.com, which featured on 46 (73.02%) sites; 6 (9.52%) sites, all owned by Newsquest, had links to the parenting site, netmums.com.

None of the sites solicited donations from users, which Rappa (2001) refers to as the public broadcasting approach after the model used by the US National Public Radio.

Discussion and Conclusion

In line with the findings of research into other markets (Chyi & Sylvie 2001, Krueger & Swatman 2004, Mensing & Rejfek 2005) the audit of the revenue streams featured on the companion websites of the regional newspapers in this study (RQ1) found that advertising remained the most popular source of online revenue for newspapers' companion websites. However, contrary to the findings of study into the online strategies of a selection of the top national and regional newspaper sites in the UK (Herbert & Thurman 2007), publishers had erected few paywalls around content on their sites. Instead, many were looking beyond the business models traditionally considered by newspapers to news streams Rappa (2001) had found employed by other businesses.

The audit showed that the newspapers in this study were expanding their offline roles as intermediaries onto the Web where they are building a variety of partnerships that drive revenue. However, from analysing the websites alone, the logistics chain remained opaque and, by extension, it was not clear to what extent publishers were extracting revenues from the various steps in the value chain, as suggested by Sylvie (2008).

Such limitations notwithstanding, the findings did demonstrate that there were significant differences in the levels to which regional publishers were engaged in various business models. It also showed there were opportunities for growing their value propositions in three areas:

Content Manufacturing

All the publishers had expanded their online content into areas not available in print (including video, audio, e-mail newsletters, RSS & Twitter feeds, blogs, comments and discussion boards), but with the exception of digital facsimiles (available on 12 of the sites), there were no discernable revenue models to sustain these activities, beyond driving traffic to the host site where it could possibly contribute to increases in general advertising revenues.

There was also very limited evidence from the audit alone of the extent to which regional publishers in the sample were involved in new manufacturing activities, such as archives which other researchers found to be widely used by other publishers (Ihlstrom & Palmer 2002, Mensing & Rejfek 2005, Herbert & Thurman 2007).

At the time of the audit, the regional publishers in the study had almost no involvement on mobile platforms, which has also been considered an area with significant revenue potential for content makers (Joakar & Fish 2006, Moore 2007, Herbert & Thurman 2007, Sylvie 2008).

Inventory of Brand Integrated Content was also very limited.

Intermediary

While publishers were expanding their activities as intermediaries into a range of partnerships (such as dating sites), one related area identified by Rappa (2001) seemed unexplored: the broker model.

In the case of the Liverpool Echo site, for example, customers were steered to the company's buysell.co.uk site on which both private and trade advertisements for goods and services are sold and displayed but, unlike, online brokers eBay and Amazon, the site did not facilitate the transactions. Elsewhere on the Liverpool Echo site, there were links to Echo Outdoor where the offer to advertise on "up to 45,000 [taxis] across our national network, or to advertise on digital advertising units" suggest the company is acting as brokers for other advertising inventory. Customers were invited to call or email an advertising representative, but not to complete the transaction online. No link to the Trinity Mirror-owned advertising broker, Amra, was found either. Having said that, unlike Google Adsense, for example, the Amra site (amra.co.uk) did not facilitate online transactions either.

Networks

Networks, considered by some (Niewiarra 2002 in Krueger & Swatman 2004) to be keys to success in content distribution, is another area that may provide publishers which further revenue opportunities. Again, while site audits alone are not sufficient to discern the logistics chains behind the content, it was clear that some, but not all, publishers were engaged in a variety of advertising networks that leveraged resources within companies (e.g. Johnston Press' PropertiesToday), across publishing companies (e.g. Fish4) and with non-publishing companies (e.g. Echo Outdoor).

Most publishers were also building internal content networks that drew in traditional sources and formerly-passive readers through activities such as blogs. Some were also building links with outside content networks (e.g. netmums.co.uk). There was, however, no evidence found that these networks were providing unique value propositions that could allow them to be sustained by revenue streams, other than advertising (i.e. through sales, subscriptions, membership or donations).

To what extent could these activities be considered to reflect 'new thinking' about the Web? The findings indicate that, while there is much room for growth (some newspapers were not online at all), the majority of UK regional publishers in this study reflected what could be considered "new thinking" about the web and by offering so-called Web 2.0 tools that facilitate interactivity with and between users.

And while some were clearly missing out on the most obvious revenue opportunities (such as facilitating subscriptions to their printed papers), we also found that, in line with Krueger & Swatman's (2004) study of regional newspapers in Germany, France and Italy, the online revenue models used by some of the UK regional publishers were more sophisticated and more complex than those generally suggested in the literature or reflected in the major industry reports. However, the extent to which these were simply experimental or reflective of new thinking about the revenue models required to sustain and grow these online activities is less conclusive; further investigation is needed into the other elements of Chaharbaghi et al's (2003) meta business model - the operational system and the capacity for value creation – with particular attention to the logistics chains, value chains and enabling technologies that underpin the activities observable on the websites.

Future research

The exploratory study clearly showed there is a need for further investigation into the business models of online publishers, in general, and the regional press, in particular. Tracking studies with larger, representative samples from which generalised findings could be drawn would also allow for more complex analysis.

While Rappa's taxonomy was helpful in stimulating the researchers in looking beyond the business models traditionally employed by newspaper publishers, a taxonomy built on more explicit logic might be more useful.

This study continued in the summer of 2009 and the findings are expected to contribute to greater understanding of the diffusion of digital innovations amongst the regional newspaper publishers in Britain's cities – and of their ongoing efforts to find out just where else is the money.

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NOTES

[1] The Newspaper Society (UK) defines a regional / local newspaper as: **"**Any publication in written form, on newsprint or similar medium, published in the British Isles (excluding the Irish Republic) at regular intervals not exceeding seven days, and available regionally rather than nationally (i.e. not available throughout all or most of the British Isles). It should contain news and information of a general nature, updated regularly, rather than being devoted to a specific interest or topic" (Newspaper Society 2007).

[2] Web is here broadly defined as the network of all connected devices and applications, not just the PC-based application formally known as the World Wide Web.

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Appendix 1: The newspaper websites of the largest circulation newspapers in Britain's 66 cities

England				
City	**Newspaper**	**Circulation[1]**	**Website**	**Ownership**
Bath	Bath Chronicle	19,719	www.thisisbath.com	Northcliffe Media
Birmingham	Birmingham Mail	61,526	www.birminghammail.net	Trinity Mirror
Bradford	Bradford Telegraph + Argus	34,042	www.thetelegraphandargus.co.uk	Newsquest
Brighton	Brighton Argus	30,070	www.theargus.co.uk/	Newsquest
Bristol	Bristol Evening Post	46,522	www.thisisbristol.co.uk	Northcliffe
Cambridge	Cambridge Evening News	25195	www.cambridge-news.co.uk	Iliffe News and Media
Canterbury	Kentish Gazette	22741	www.kentonline.co.uk/kentish_gazette/	Kent Messenger Group
Carlisle	Carlisle News and Star	21776	www.news-and-star.co.uk	CN Group Ltd
Chester	Chester Chronicle	22070	www.chesterchronicle.co.uk	Trinity Mirror
Chichester	Chichester Observer	33706	www.chichester.co.uk	Johnston Press
Coventry	Coventry Telegraph	43594	www.coventrytelegraph.net	Trinity Mirror
Derby	Derby Evening Telegraph	39152	www.thisisderbyshire.co.uk	Northcliffe Media
Durham	Northern Echo	48783	www.thenorthernecho.co.uk	Newsquest
Ely	Ely Weekly News	16472	www.cambridge-news.co.uk/cn_news_elynews/	Iliffe News and Media
Exeter	Exeter Express and Echo	19353	www.thisisexeter.co.uk	Northcliffe
Gloucester	The Citizen	23474	www.thisisgloucestershire.co.uk	Northcliffe
Hereford	Hereford Times	37236	www.herefordtimes.com	Newsquest
Hull	Hull Daily Mail	51886	www.thisishullandeastriding.co.uk/hull	Northcliffe
Lancaster	Lancaster Guardian	15289	www.lancasterguardian.co.uk	Johnston Press
Leeds	Yorkshire Evening Post	49064	www.yorkshireeveningpost.co.uk	Johnston Press
Leicester	Leicester Mercury	64919	www.thisisleicestershire.co.uk	Northcliffe

	Lichfield Mercury	44277	www.thisislichfield.co.uk	Northcliffe
Lichfield	Lichfield Mercury	44277	www.thisislichfield.co.uk	Northcliffe
Lincoln	Lincolnshire Echo	20181	www.thisislincolnshire.co.uk	Northcliffe
Liverpool	Liverpool Echo	97779	www.liverpoolecho.co.uk	Trinity Mirror
London	Evening Standard	294,337	www.thisislondon.co.uk	Associated Newspapers
Manchester	Manchester Evening News	170227	www.manchestereveningnews.co.uk	Guardian Media Group
Newcastle	Newcastle Evening Chronicle	67103	www.chroniclelive.co.uk	Trinity Mirror
Norwich	Norwich Evening News	21030	www.eveningnews24.co.uk	Archant
Nottingham	Nottingham Evening Post	51526	www.thisisnottingham.co.uk	Northcliffe
Oxford	Oxford Mail	23402	www.oxfordmail.net	Newsquest
Peterborough	Peterborough Evening Telegraph	16428	www.peterboroughtoday.co.uk	Johnston Press
Plymouth	The Herald (Plymouth)	34342	www.thisisplymouth.co.uk	Northcliffe
Portsmouth	Portsmouth News	49628	www.portsmouth.co.uk	Johnston Press
Preston	Lancashire Evening Post	36523	www.lep.co.uk	Johnston Press
Ripon	Harrogate Advertiser	29637	www.harrogateadvertiser.net	Johnston Press
Salford	Salford Advertiser	85033	www.salfordadvertiser.co.uk	Guardian Media Group
Salisbury	Salisbury Journal	26206	www.salisburyjournal.co.uk	Newsquest
Sheffield	The Star	47216	www.thestar.co.uk	Johnston Press
Southampton	Southern Daily Echo	36906	www.dailyecho.co.uk	Newsquest
St Albans	St Albans and Harpenden Review	48463	www.stalbansreview.co.uk	Newsquest
Stoke	The Sentinel	58049	www.thisisstaffordshire.co.uk	Northcliffe
Sunderland	Sunderland Echo	39159	www.sunderlandecho.com	Johnston Press
Truro	West Briton	37732	www.thisiscornwall.co.uk	Northcliffe
Wakefield	Wakefield Express	30718	www.wakefieldexpress.co.uk	Johnston Press
Wells	Wells Journal [2]	17465	www.thisissomerset.co.uk	Northcliffe
Westminster	London Informer	58938	www.londoninformer.co.uk	Trinity Mirror
Winchester	Hampshire	14830	www.hampshirechronicle.	Newsquest

	Chronicle [3]		co.uk	
Wolverhampton	West Midlands Express and Star	130012	www.expressandstar.com	Midland News Association
Worcester	Worcester News	16507	www.worcesternews.co.uk	Newsquest
York	York Press	31569	www.thepress.co.uk	Newsquest

Scotland				
City	Newspaper	Circulation	Website	Ownership
Aberdeen	Evening Express	52029	www.eveningexpress.co.uk	D.C. Thompson and Co
Dundee	Evening Telegraph	23048	www.eveningtelegraph.co.uk	D.C. Thompson and Co
Edinburgh	Evening News	47129	edinburghnews.scotsman.com	Johnston Press
Glasgow	Evening Times	68422	www.eveningtimes.co.uk	Newsquest
Inverness	Inverness Courier	16924	www.inverness-courier.co.uk	Scottish Provincial Press
Stirling	Stirling Observer	10592	www.stirlingobserver.co.uk	Trinity Mirror

Wales				
City	Newspaper	Circulation	Website	Ownership
Bangor	Bangor Mail	8927	www.theonlinemail.co.uk	Trinity Mirror
Cardiff	South Wales Echo	41550	www.walesonline.co.uk	Trinity Mirror
Newport	South Wales Argus	27101	www.southwalesargus.co.uk	Newsquest
St Davids	Western Telegraph	23601	www.westerntelegraph.co.uk	Newsquest
Swansea	South Wales Evening Post	47875	www.thisissouthwales.co.uk	Northcliffe

Northern Ireland				
City	Newspaper	Circulation	Website	Ownership
Armagh	Ulster Gazette and Armagh Standard	9449	www.ulstergazette.co.uk	Alpha Newspaper Group
Belfast	Belfast Telegraph	69457	www.belfasttelegraph.co.uk	Independent News and Media
Lisburn	Ulster Star	8,953	www.lisburntoday.co.uk	Johnston Press
Derry	Derry Journal	37,106	www.derryjournal.co	Johnston Press

			m	
Newry	Newry Reporter	13,723	www.newryreporter.com	Edward Hodgett Ltd

[1] Circulation figures, unless otherwise indicated, are from ABC 2008b, July - December 2008.

[2] Circulation figures for the Wells Journal are not available in isolation.

The figure given is the circulation for the Mid Somerset Series, as defined by the ABC.

[3] Circulation figures for the Hampshire Chronicle are for the period of January 2008 - December 2008

Number of titles by publisher in sample