

# UUTISMEDIAN UUDET LIIKETOIMINTAMALLIT YHDYSVALLOISSA

**KATJA LEHTISAARI, MIKKO GRÖNLUND, CARL-GUSTAV LINDÉN, MIKKO VILLI,  
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Utismedian uudet liiketoimintamallit Yhdysvalloissa  
New Business Models in U.S. News Media

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Tekijät @ Katja Lehtisaari, Mikko Grönlund, Carl-Gustav Lindén, Mikko Villi, Robert Picard,  
Bozena Mierzejewska, Axel Röpnack

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# KIRJOITTAJAT

KTM **Mikko Grönlund** on Turun yliopiston Brahea-keskuksen tutkimuspäällikkö.

YTT **Katja Lehtisaari** on yliopistotutkija Aleksanteri-instituutissa ja Svenska Social- och kommunalhögskolanissa Helsingin yliopistossa.

**Carl-Gustav Lindén**, PhD, on median ja journalismin tutkija Svenska social- och kommunalhögskolanissa Helsingin yliopistossa sekä journalismin lehtori Södertörnin yliopistossa Ruotsissa.

TaT **Mikko Villi** on Jyväskylän yliopiston journalistiikan professori.

PhD **Bozena Mierzejwska** on apulaisprofessori Fordhamin yliopiston Gabelli School of Businessissa New Yorkissa Yhdysvalloissa.

**Robert Picard**, PhD, on Senior Research Fellow Oxfordin yliopiston Reuters-instituutissa ja fellow Yale Law Schoolin Information Society -tutkimusprojektissa Yhdysvalloissa.

PhD **Axel Röpnack** on apulaisprofessori Fordhamin yliopiston Gabelli School of Businessissa New Yorkissa Yhdysvalloissa.

# EXECUTIVE SUMMARY: NEW BUSINESS MODELS IN U.S. NEWS MEDIA

The purpose of this study is to analyse how the digital environment affects the ecosystem of news media in the United States. We explore how the business operations of news organizations, especially newspapers, are changing. This report offers a comparative perspective on new business models and forms of revenue that can be utilized by the Finnish news media to develop their own business and editorial practices. The study reveals the wide differences in approach of individual newspaper publishers; those who want to learn from the US media industry need to individually determine which approaches are most appropriate for them.

In this study, we utilize well data to shape a picture of the overall business environment in US newspapers. This is combined with qualitative interview data collected in the US in the spring and summer of 2017 from media managers, researchers, industry representatives and media analysts (N=35).

For the US media companies, like their counterparts in Finland and elsewhere, the last years have been challenging in economic terms. The amount of publications is decreasing, as is also the overall circulation. Newspapers are facing the rapid loss of advertisement revenues and losing the battle against Google and Facebook when it comes to digital advertising revenues. However, the audience is relatively well equipped for consuming digital media content even if the internet penetration in households in the US is still lower than, for example, Finland. The reader revenues are increasingly significant.

We conclude that competition and changes in technology and media consumption have made the traditional, relatively straightforward business model focusing on creating revenue streams through audiences and advertisers outdated. Today, business model innovation is more focused on building and nurturing value-creating relationships with readers, advertisers, partners, and intermediaries. When these relationships are effective, they become the basis for revenue-producing activities. Contemporary news business models and activities require knowledge and competences that are often absent from traditional news industry workforces. These competences include, for example, digital content production, web design, digital marketing and sales, social media content coordination, digital account management, web analytics analysis, as well as relationship management and engagement facilitation for readers, advertisers, and other customers.

Expanding a business model to include new activities and revenue creation through content syndication, newsletters, event production and management, branded merchandise, creative services, web hosting and SEO, and package delivery also require acquiring personnel with skills and abilities not present in most news providers today. They require an entrepreneurial attitude and the creation of individual business models and value-creating strategies for each activity.

New structures and working arrangements are needed in newsrooms and more interaction with those engaged in relationship management and digital customer management is required. Most publishers, in the US and elsewhere, are still struggling to adapt to the digital age. For legacy media rooted deeply in a stable ecosystem of actors, routines, habits and norms, the upheaval is often felt as a threat. The leap from print to digital publication, as well as integration of content, audience and producers, is a challenge for newspaper companies.

Operating in the digital environment is forcing the companies to make significant investments in technology, software, systems and personnel. News organizations such as the *New York Times* and *Washington Post*, which have led these developments, perceive those investments as central to their

strategies and future growth. Many smaller news organizations seem to think that they must follow the national news organizations without developing their own business models and strategy or without regards to whether they will be equally useful. Thus, innovation (or often, imitation) seems to be the goal rather than the means to a goal.

Changing media consumption practices and shifting revenue streams require news providers to think more strategically about their relationships with multiple stakeholder groups and, most importantly, adopt a broader approach to business models. Our review of the US newspaper business reveals that it is struggling with creating functioning business models and is still finding its way in the digital environment. We conclude that newspaper publishers in other countries should not look to the US to provide answers to their challenges, but rather use the experience from the US to help clarify their strategies and avoid many of the weaknesses in the US approaches.

The US experience shows the unwillingness or inability of many established newspaper firms to consider value creation and business relationships in the broader way that digital competitors and emerging news providers are embracing. The need to embrace those perspectives and to alter operations grows stronger every day, and newspaper publishers seeking lessons from the US should try to avoid the damaging conservatism and surmount the hurdles that US publishers are having difficulty overcoming. The newspaper industry is in a situation where individual innovations and changes are often not enough, but rather the companies should think about refashioning their operations and the newspaper model itself. There is no universal solution, but the examples provided in this study may serve as inspiration for finding new ways of value creation in newspaper publishing.

# JOHDANTO

Painetun median tilanne on maailmanlaajuisesti haastava. Digitaalisen toimintaympäristön muutos muokkaa uutismedian kehitystä. Sanomalehdet joutuvat etsimään uusia liiketoimintamalleja, kun samaan aikaan painettujen lehtien lukijamäärät laskevat ja mainostuotot vähenevät. Lehtiyhtiöt ovat yrittäneet sopeutua uuteen tilanteeseen ja kehittäneet omia ratkaisujaan, mutta ainakin toistaiseksi monissa tapauksissa uusista palveluista saadut tulot ovat jääneet selvästi painetusta mediasta menetetyistä tuloista pienemmiksi.

Yhdysvalloissa sanomalehtien vuosi 2015 oli taloudellisesti haastavin vuoden 2008 finanssikriisin jälkeen. Sanomalehtien yhteenlaskettu levikki putosi seitsemän prosenttia, mikä oli suurin pudotus sitten vuoden 2010. Päivälehtien digitilaukset nousivat kaksi prosenttia, mutta ne edustavat edelleen vain yhtä prosenttia koko levikistä. Samaan aikaan pörssinoteerattujen sanomalehtiyhtiöiden mainostulot (printti ja digi yhteensä) laskivat kahdeksan prosenttia (Mitchell ym. 2016). Lukijamaksujen suhteellinen osuus lehtien tuloista onkin noussut voimakkaasti ja painopiste yhtiöiden strategiassa on siirtymässä entistä enemmän kohti lukijoilta saatavia tuloja.

Samaan aikaan kun mediayhtiöt eri puolilla maailmaa kipuilevat muutoksessa, internetin kehitystä eteenpäin vievät suuret teknologiayhtiöt Google, Amazon, Facebook ja Apple (ns. GAFA) ovat kasvaneet taloudellisesti ja jatkuvasti uusia innovatiivisia tuotteita kehittäviksi globaaleiksi jättiläisiksi. Tälle teknologiayhtiöiden keskittymistrendille vastakkaisena ilmiönä alalle tulon investointikustannukset ovat romahtaneet aiemmin suurina alkuinvestointeja vaatineilla toimialoilla, mikä on edesauttanut uusien innovatiivisten startup-yritysten syntyä myös media-alalle. Muutamia näistä ovat kasvaneet jo huomattaviksi kansainvälisiksi toimijoiksi – Vox Media, Huffington Post, BuzzFeed, Vice, Quartz – vaikka niiden taloudellinen menestys on ollut vielä vaatimatonta.

Facebook, Apple ja Google ovat vahvasti mukana useiden toimialojen alustarakaisuuksissa. Ne ovat tarjonneet yhteistyötä myös useille suurille mediataloille ja näyttää siltä, että yhteistyöhön laajamittaisesti mutta vastahakoisesti suostutaan – koska ei ole varaa olla suostumatta. Taloudellisten ja teknologisten resurssien sekä laajan globaalien tavoitavuuden ohella teknologiayhtiöiden käyttäjätiedot ja kyvykyys hyödyntää näitä tietoja ovat yliverkaisia. Facebook on seuraamassa Googlen esimerkkiä ja alkoi keväällä 2017 luoda uusia ratkaisuja, joilla suuryritys haluaa auttaa median ekosysteemiä selviytymään. Campbell Brown on entinen CNN:n ja NBC:n toimittaja, joka 2017 nimitettiin Facebookin Global News Partnerships -yksikön johtajaksi. Kesäkuussa 2017 GEN Summitissa Wienissä hän kuvaili rooliaan näin:

Even though Facebook is not a news organization, obviously, it is part of the news ecosystem. It is a big part, it is a critical part of the news ecosystem. That means that we have a responsibility to work with that ecosystem and to try to make it better for everybody. (Brown, 2017)

Tämän tutkimusraportin tavoitteena on tutkia digitaalisen toimintaympäristön vaikutusta uutismedian ekosysteemin kehitykseen Yhdysvalloissa. Tarkastelemme uutismedian, erityisesti sanomalehtien, liiketoiminnan viimeaikaista kehitystä Yhdysvalloissa. Tarjoamme yhdysvaltalaisen sanomalehtiyhtiöiden uusista liiketoimintamalleista ja tulonlähteistä vertailutietoa suomalaisen uutismedian liiketoiminnan kehittämiseksi ja suoraan käytäntöön sovellettavaksi. Tässä hyödynnämme markkinadataa pohjautuvaa tietoa yhdysvaltalaisesta sanomalehtialasta sekä keväällä ja kesällä 2017 yhdysvaltalaisissa sanomalehtiyhtiöissä toteutetun haastattelututkimuksen avulla saatua laadullista tietoa.



Tutkimuksen on rahoittanut Viestintäalan tutkimussäätiö. Tutkimuksen toteuttajina ovat Katja Lehtisaari ja Carl-Gustav Lindén (Helsingin yliopisto), Mikko Grönlund (Turun yliopisto), Mikko Villi (Jyväskylän yliopisto), Robert Picard (Oxfordin yliopisto ja Yale Law School) sekä Bozena Mierzejewska ja Axel Röpnack (Fordhamin yliopisto).

# AINEISTO JA MENETELMÄT

Tutkimusraportti koostuu kahdesta osiosta, jotka muodostavat toisiaan tukevan kokonaisuuden:

- 1) selvitys mediayritysten taloudellisesta tilanteesta Yhdysvalloissa
- 2) haastattelututkimus Yhdysvalloissa, joka pohjautuu konkreettiseen case-aineistoon.

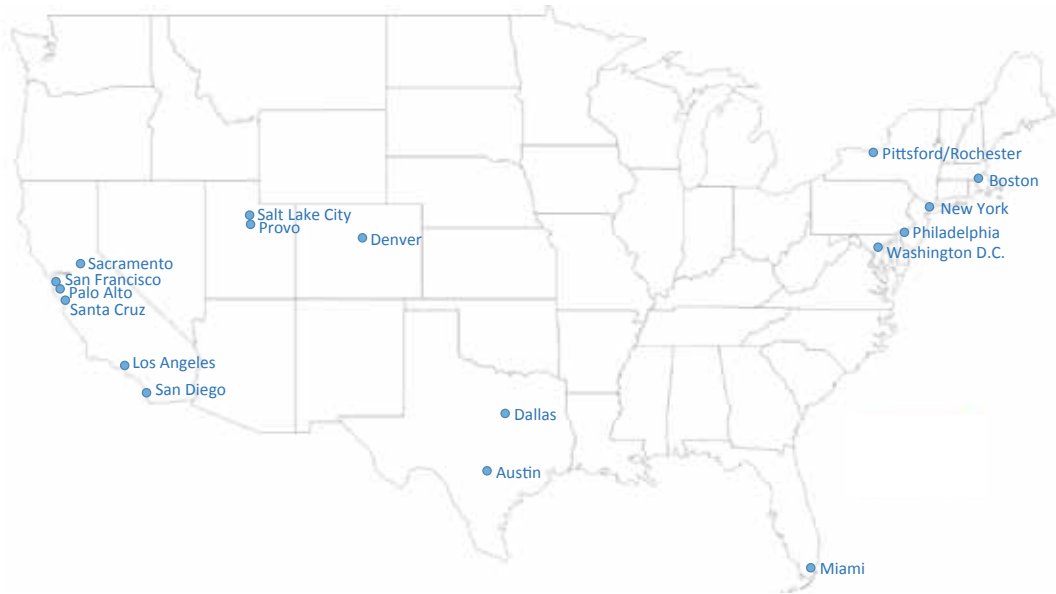
Nämä kaksi raportin osaa tukevat toisiaan: taloudellinen tilannekatsaus tuottaa kysymyksiä haastatteluihin ja haastatteluista saadaan tukea ja taustoitusta tilannekatsaukseen sekä kokonaisanalyysiin. On olennaista tarkastella mediayritysten tilannetta sekä määrällisen että laadullisen aineiston avulla. Määrällinen analyysi tarjoaa laajemman katsauksen yritysten tilanteeseen ja laadullinen analyysi puolestaan vie ”numeroiden taakse” ja auttaa ymmärtämään tilannetta syvemmin. Laadullinen haastatteluaineisto myös tarjoaa mahdollisuuksia tuottaa tietoa erilaisista lehtikohtaisista käytänteistä ja ratkaisumalleista.

Haastattelututkimuksen aineistona ovat Yhdysvaltalaisen uutismedian toimitusjohtajien, päätoimittajien ja kaupallisten toimintojen johtajien kanssa tehdyt haastattelut. Mukaan on valittu sanomalehtiä julkaisevia yhtiöitä niin, että edustettuna on valtakunnallisia, alueellisia ja paikallisia lehtiä sekä maksullisia ja ilmaisia lehtiä. Haastattelukierrosta on täydennetty tutkijoiden ja toimialajärjestöjen johtajien haastatteluilla. Haastatteluista valtaosa on tehty kasvokkain eri puolilla Yhdysvaltoja (kuvio 1), pieni osa on tehty Skype- tai puhelinhaastatteluina.

Haastatteluja tehtiin tutkimusta varten kaikkiaan 35. Haastateltavien toiveesta lainauksia tutkimushaastatteluista käytetään anonymisti. Lainausten yhteydessä on juoksevan luvun (#U1-#U35) mukainen haastateltavan yksilöinti sekä tieto hänen taustastaan: CEO (toimitusjohtaja), E-in-C (päätoimittaja), CM (päällikkötason työntekijä), RMA (medialiiton edustaja), MCA (media-alan tutkija) sekä MA (media-analyytikko).

Raporttia täydentävät mediatalouden tutkimuksen pioneerin Robert Picardin kirjoittama luku liiketoimintamallien muutoksesta sekä mediajohtamisen merkittävien asiantuntijoiden Bozena Mierzejewskan ja Axel Röpnackin kirjoittama luku digitaalisen kerronnan mahdollisuuksista sanomalehtien liiketoiminnan kannalta.

**Kuvio 1. Haastattelututkimukseen osallistuneiden henkilöiden edustamien yritysten ja organisaatioiden maantieteellinen sijoittuminen niiden kotipaikkakunnan mukaan.**



# UUTISMEDIAN LIIKETOIMINTA JA TOIMINTAYMPÄRISTÖ YHDYSVALLOISSA

Tässä luvussa luodaan katsaus Yhdysvaltojen sanomalehtien liiketoimintaan, kehitykseen ja toimintaympäristöön sekä siinä tapahtuneisiin muutoksiin viime vuosina. Merkittävänä tekijänä taustalla on se, että Yhdysvallat ajautui lamaan joulukuussa 2007 (National Bureau of Economic Research, NBER). Yhdysvaltain työministeriön<sup>1</sup> tilastojen mukaan työpaikkojen määrä väheni helmikuun 2007 ja helmikuun 2010 välisenä aikana noin 8,7 miljoonalla. Samana ajanjaksona bruttokansantuote supistui 5,1 prosenttia, mikä teki taantumasta pahimman sitten vuonna 1929 alkaneen taloudellisen taantumun eli Suuren laman (engl. Great Depression) jälkeen.

Vuoden 2004 jälkeen omistaja on vaihtunut yli kolmasosalla kaikista sanomalehtinimikkeistä Yhdysvalloissa, ja osa niistä on tuona aikana myyty kaksi tai useamman kerran (Abernathy 2016). Vuonna 2014 toimialan 25 suurinta yritystä omistivat yhteensä 2199 sanomalehteä. 25 seuraavaksi suurinta yritystä omistivat yhteensä vain 631 sanomalehtinimikettä. 4–7 kertaa viikossa ilmestyvistä sanomalehdistä suurimmat yritykset omistivat hieman yli puolet ja 1–3 kertaa viikossa ilmestyvistä sanomalehdistäkin noin viidenneksen.

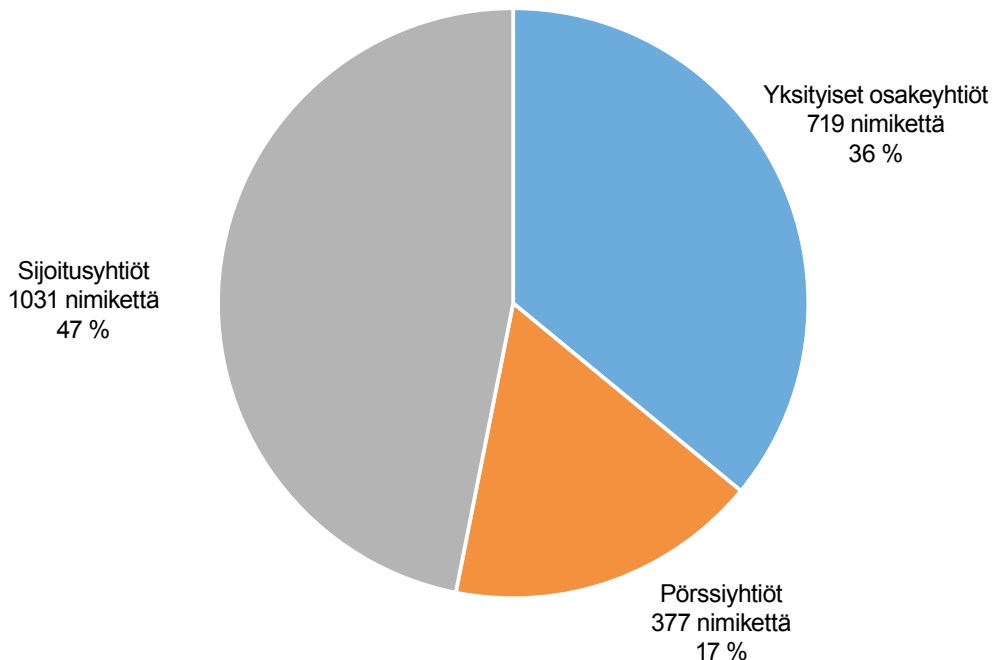
**Taulukko 1. Sanomalehtinimikkeiden määrällä mitattuna 25 suurinta yritystä Yhdysvalloissa vuonna 2016 (Lähde: UNC tietokanta).**

Yrityksen nimi	Nimikkeitä yhteensä	4–7-päiväisiä nimikkeitä	Kokonaislevikki (1 000 kpl)	Päivittäinen kokonaislevikki (1 000 kpl)
1. New Media/GateHouse	432	125	3 577	1 813
2. Gannett	258	109	5 171	3 292
3. Digital First Media	208	62	3 941	2 038
4. Community Newspaper Holdings Inc (CNHI)	125	75	1 105	727
5. Lee Enterprises	113	52	1 335	867
6. tronc/Tribune Publishing	104	19	3 433	2 054
7. Civitas Media	90	34	693	332

<sup>1</sup> United States Department of Labor (DOL).

8. Shaw Media	83	9	439	87
9. Ogden Newspapers	82	41	747	434
10. BH Media Group	80	33	1 321	947
11. Advance Publications	74	21	2 491	1142
12. McClatchy	68	29	2 538	1 516
13. Boone Newspapers	61	26	367	174
14. Landmark Media Enterprises	57	4	552	156
15. Paxton Media Group	53	32	473	328
16. Adams Publishing Group	52	14	438	133
17. Community Media Group	52	11	289	63
18. News Media Corporation	48	3	219	17
19. Black Press Group	47	9	1 375	507
20. 10/13 Communications	45	3	860	60
21. Rust Communications	44	18	236	135
22. ECM Publishers	42	1	486	2
23. Forum Communications	41	11	355	154
24. Trib Publications	35	0	118	0
25. Horizon Publications	32	22	142	91

Ennen vuosien 2008–2009 lamaa aktiivisimpia toimijoita sanomalehtien ostomarkkinoilla olivat pörssinoteeratut mediayhtiöt. Viime vuosina kuitenkin erilaiset sijoitusyhtiöt ovat ostaneet aktiivisesti sanomalehtiä ympäri maata (kuvio 2). Nämä uudet omistajat ovat hyvin erilaisia kuin perinteiset sanomalehtikustantajat. Suurimmalla osalla niistä ei ole kokemusta journalismista ja sanomalehdet edustavat vain murto-osaa niiden laajasta liiketoimintaportfoliosta. Näiden toimijoiden tehtävänä on tuottaa sijoittajille rahaa, joten ne toimivat varsin lyhyellä aikaperspektiivillä ja luopuvat nopeastikin sellaisista sanomalehdistä, jotka eivät pysty aikaansaamaa tavoiteltua tuottoa.

**Kuvio 2. Sanomalehtinimikkeiden omistus Yhdysvalloissa (Lähde: UNC Database/Abernathy, 2016)**


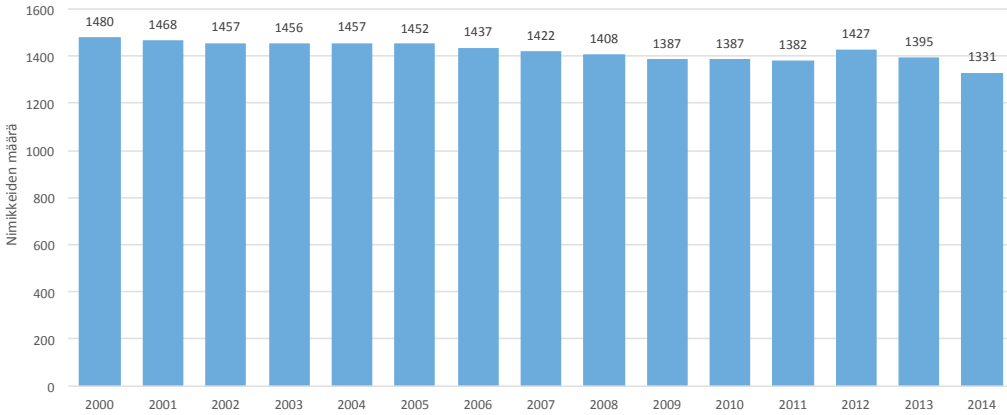
Laman myötä sanomalehdet ajautuivat syöksykierteeseen, joka on aiheuttanut muutospainetta ja uudelleenjärjestelytarpeita koko toimialalle. Pew Research Centerin<sup>2</sup> mukaan vuosi 2015 oli sanomalehtialalle ehkä pahin laman ja sen välittömien seurausten jälkeen. Sanomalehtien kokonaislevikki laski yhteensä noin seitsemän prosenttia, joka oli suurin vuosittainen lasku vuoden 2010 jälkeen. Samanaikaisesti sanomalehtien kokonaisilmoitustuotot tippuivat lähes kahdeksan prosenttia. Tämä oli suurin pudotus sitten vuoden 2009.

Vuosituhanen vaihteen jälkeen satoja sanomalehtiä Yhdysvalloissa on lakkautettu, yhdistetty tai niiden viikoittaisia ilmestymiskertoja on vähennetty. Abernathyn (2016) mukaan erilaisten tietokantojen listausten mukaan sanomalehtinimikkeiden kokonaismäärä vaihtelee 7 000 ja yli 12 000 tuhanen välillä. Toimialajärjestön ja toimiala-analyttikkojen arvioiden mukaan sanomalehtinimikkeiden kokonaismäärä on noin 11 000 kappaletta. Tarkasteltaessa 4–7 kertaa viikossa ilmestyvien sanomalehtinimikkeiden määrän kehitystä, voidaan havaita niiden kokonaismäärän laskeneen pitkälti yli sadalla nimikkeellä. 4–7 kertaa viikossa ilmestyvien sanomalehtinimikkeiden määrä Yhdysvalloissa on pudonnut vuosien 2000 ja 2014 välisenä aikana 149 nimikkeellä 1480 nimikkeestä 1331 nimikkeeseen (kuvio 3). Tämä tarkoittaa, että vuosituhanen vaiheen jälkeen noin joka kymmenennen (10,1 %) 4–7

<sup>2</sup> State of the News Media -raportti 2016. Ensimmäinen State of the News Media -raportti julkaistiin vuonna 2004.

kertaa viikossa ilmestyvän sanomalehden julkaiseminen on syystä tai toisesta päättynyt. 1–3 kertaa viikossa ilmestyvien sanomalehtinimikkeiden määrä laski vuosien 2004 ja 2014 välisenä aikana puolestaan 526 nimikkeellä 7122 nimikkeestä 6596 nimikkeeseen (Abernathy, 2016). Suurimmalla osalla, eli 98 prosentilla jäljellä olevista 1–3 kertaa viikossa ilmestyvistä sanomalehdistä levikki on alle 15 000 kappaletta.

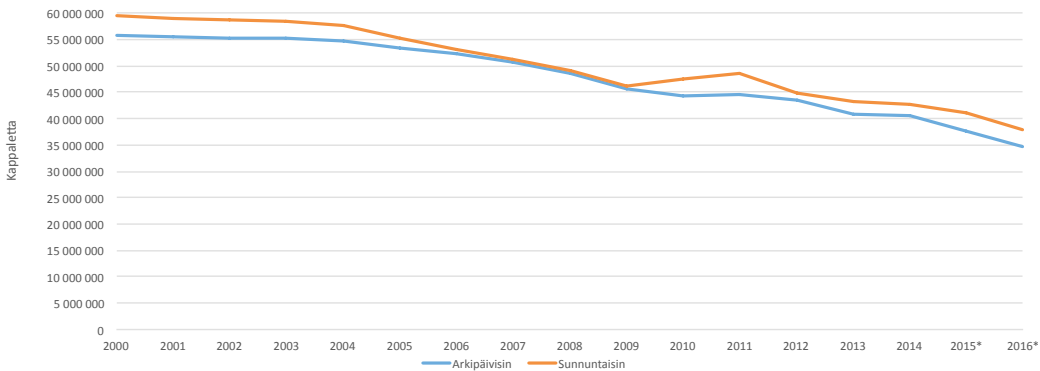
**Kuvio 3. 4–7-päiväisten sanomalehtinimikkeiden määrän kehitys Yhdysvalloissa 2000–2014 (Lähde: World Press Trends ja State of the News Media -raportin Editor & Publisher’s Newspaper DataBookiin perustuvat luvut).**



## SANOMALEHTIEN TAVOITTAUUS

Painettujen sanomalehtien kokonaislevikki on jo pitkään ollut laskussa (kuvio 4). Vuosituhannen vaihteessa 4–7-päiväisten sanomalehtien kokonaislevikki arkipäivisin oli vielä noin 55,8 miljoonaa kappaletta, josta se vuoteen 2016 mennessä oli laskenut 38 prosenttia vajaaseen 34,7 miljoonaan kappaleeseen. Abernathyn (2016) tutkimuksen mukaan 1–3 kertaa viikossa ilmestyvien sanomalehtien kokonaislevikki laski vuosien 2004 ja 2014 välillä 67 miljoonasta 57 miljoonaan kappaleeseen eli noin 15 prosenttia.

**Kuvio 4. 4–7-päiväisten sanomalehtien kokonaislevikki 2000–2016 (Lähde: Editor & Publisher ja Pew Research Center).<sup>3</sup>**



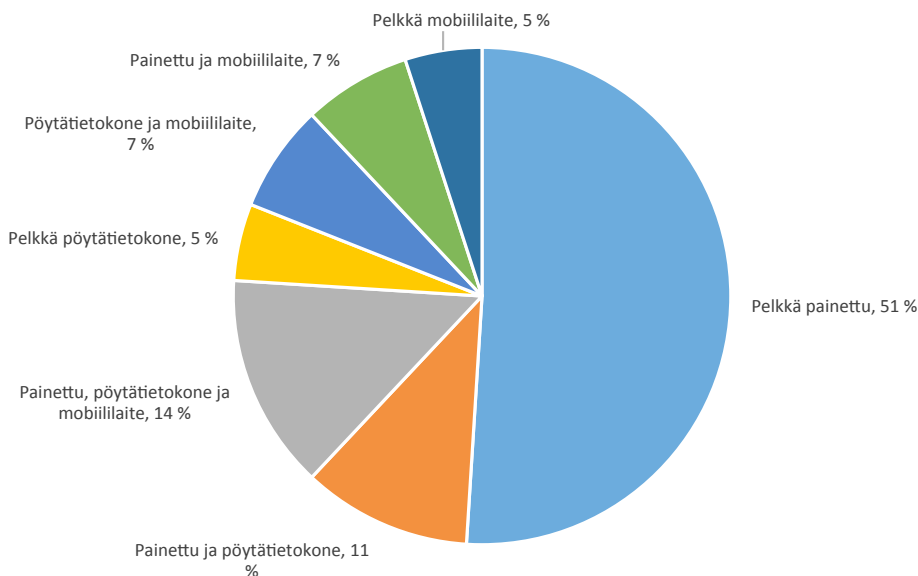
<sup>3</sup> Kuvion luvut vuoteen 2014 asti perustuvat Editor & Publisherin julkaisemiin tietoihin. Luvut vuosilta 2015 ja 2016 ovat Pew Research Centerin tekemiä arvioita, jotka perustuvat Alliance for Audited Median tietoihin.

Sanomalehtien tavoitavuus on vuosituhannen vaihteen jälkeen ollut laskussa Yhdysvalloissa. Vuosituhannen vaihteessa sanomalehdet tavoittivat päivittäin vielä hieman yli 55 prosenttia aikuisväestöstä. Viimeisimmät saatavilla olevat tiedot vuodelta 2012 osoittavat sanomalehtien tavoitavuuden laske-  
neen vajaan 42 prosenttiin.

Kehitystä tarkasteltaessa on huomioitava, että paperinen lehti on edelleen selvästi suosituin tapa lukea sanomalehteä (kuvio 5). Vuonna 2015 noin puolet (51 %) sanomalehtiä lukevasta aikuisväestöstä luki pelkästään paperilehteä. Pelkästään tietokoneelta ja/tai mobiililaitteelta sanomalehtiä lukevien aikuisten osuus oli noin viidennes (17 %).

Koko sanomalehtialan digitaalisen yleisön mittaaminen on vaikeaa, koska monien päivälehtien verkkosivustot eivät kerää riittävästi liikennettä, jotta comScore<sup>4</sup> mittaisi niiden kävijämääriä. Seuraavat luvut perustuvatkin viidenkymmenen suurimman yhdysvaltalaisen päivälehtien mittaustuloksiin: Analytiikkayhtiö comScoren Media Metrix Multi-platform -mittauksen mukaan vuoden 2016 neljän-  
nellä vuosineljänneksellä niiden verkkosivustot keräsivät kuukausittain keskimäärin 11,7 miljoonaa ainutkertaista kävijää. Tämä on noin 21 prosentin lisäys vuoteen 2015 verrattuna. Keskimääräinen vierailuaika näiden sanomalehtien verkkosivustoilla oli 2 minuuttia 45 sekuntia, mikä on hieman vähemmän kuin vuosina 2014 ja 2015, jolloin keskimääräinen vierailuaika oli 2 minuuttia 59 sekuntia.

**Kuvio 5. Sanomalehtien lukemistavat vuonna 2015 (Lähde: Nielsen Scarborough USA).**



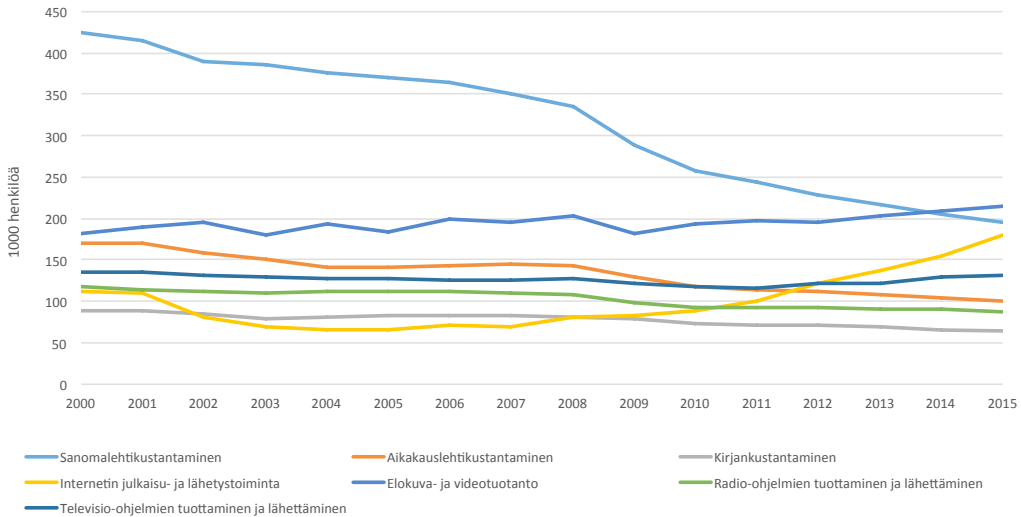
## HENKILÖSTÖMÄÄRÄN KEHITYS

Bureau of Labor Statisticsin tilastojen sanomalehtialalla työskenteli vuosituhannen vaihteessa lähes 424 000 henkilöä. Vuoteen 2016 mennessä tämä luku oli laskenut lähes 60 prosenttia hieman yli 183 000 henkilöön (kuvio 6). Vuoden 2010 jälkeenkin toimialan kokonaishenkilöstömäärä on laskenut reilun neljänneksen (29 %). Vastaavana ajanjaksona internetin julkaisu- ja lähetystoiminnan kokonaishenkilöstömäärä yli kaksinkertaistui hieman yli 88 000 henkilöstä lähes 198 000 henkilöön.

<sup>4</sup> comScore on yhdysvaltalainen mediamittauksen ja -analytiikan yhtiö, joka markkinoi tietoja ja analytiikkaa yrityksille.

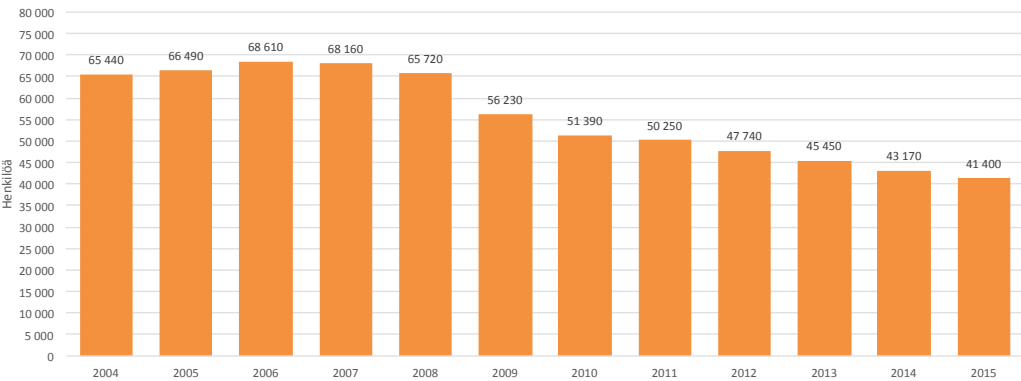


**Kuvio 6. Eri viestintäalojen kokonaishenkilöstömäärä 2000–2015 (Lähde: Bureau of Labor Statistics Occupational Employment Statistics).**



Sanomalehtien toimitusten kokonaishenkilöstömäärä Yhdysvalloissa vuonna 2015 oli 41 400 työntekijää (kuvio 7). Tämä oli neljä prosenttia vähemmän kuin edellisvuonna ja noin 37 prosenttia vähemmän kuin vuonna 2004.

**Kuvio 7. Sanomalehtien toimitusten kokonaishenkilöstömäärä 2004–2015 (Lähde: Bureau of Labor Statistics Occupational Employment Statistics).**

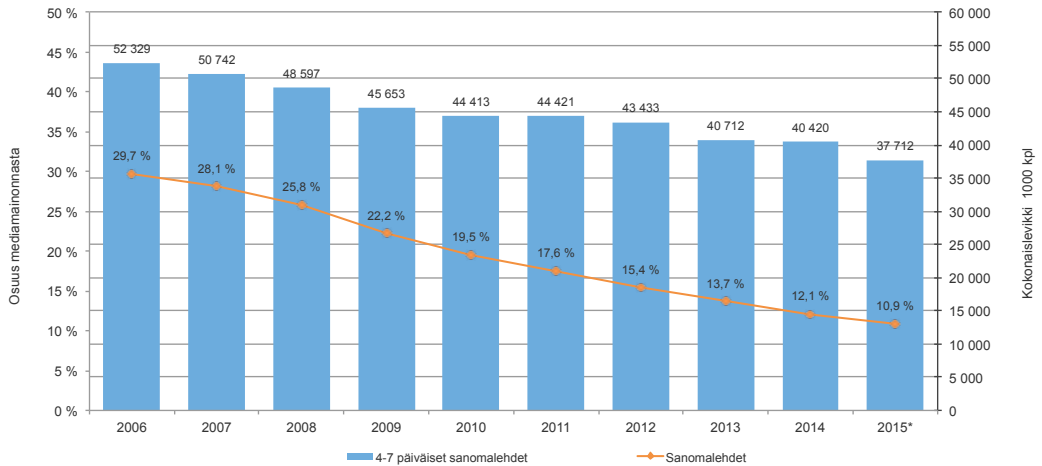


## SANOMALEHDET JA MEDIAMAINONTA

Yhdysvalloissa on ylivoimaisesti maailman suurimmat mainosmarkkinat. ZenithOptimedian maaliskuussa 2017 julkaistun Advertising Expenditure Forecastin mukaan ne ovat yli 190 miljardia dollaria. Tämä on yli kaksinkertainen määrä verrattuna Kiinaan, jonka mainosmarkkinat ovat maailman toiseksi suurimmat (80 miljardia dollaria). Strategy Analyticsin mukaan Yhdysvalloissa käytettiin vuonna 2014 mainontaan 567 dollaria asukasta kohden ja IHS Markitin arvion mukaan vuonna 2016 vastaava luku oli 553 dollaria.

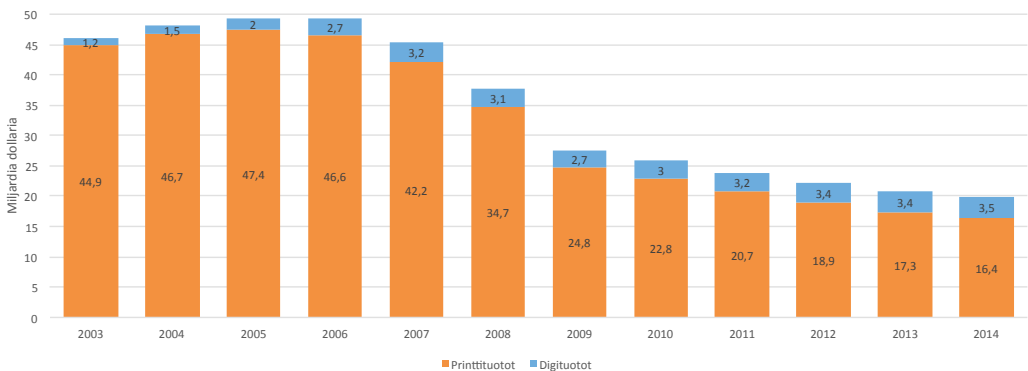
Mediamainonnan rakenteessa on viimeisten kymmenen vuoden aikana tapahtunut huomattavia muutoksia. Sanomalehtien, mukaan lukien ilmaislehdet, osuus mediamainonnasta oli vuonna 2006 vielä vajaa kolmannes. Sen jälkeen suunta on ollut selvästi laskeva (kuvio 8) ja vuonna 2015 sanomalehtien osuus mediamainonnasta oli Yhdysvalloissa enää vain noin kymmenes (10,9 %).

**Kuvio 8. 4–7-päiväisten sanomalehtien ja kaikkien sanomalehtien kokonaislevikin ja sanomalehtien mediamainon-  
taisuuden kehitys 2006–2015 (Lähde: World Press Trends, News Media Alliance ja Pew Research Center).**

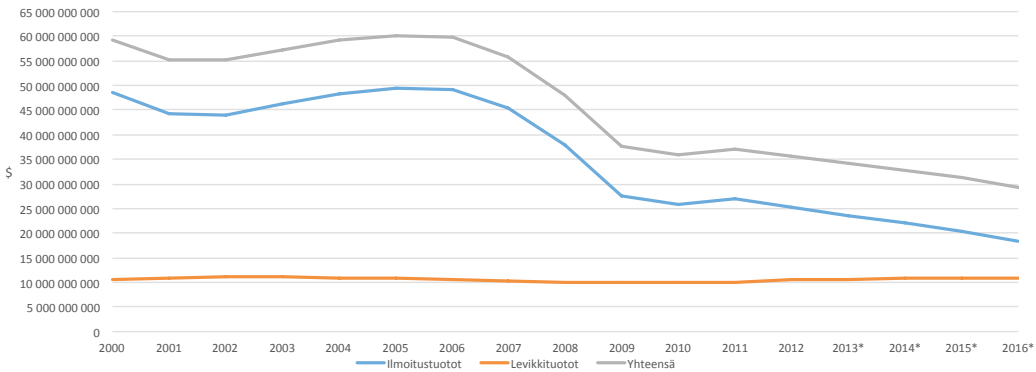


Toimialatasolla tarkasteltuna – huolimatta sanomalehtien digitaalisten tuottojen kasvusta – valta-osa sanomalehtien kaikista tuotoista kertyy edelleen painetuista lehdistä. Viimeisimpien Newspaper Association of American julkaisemien tietojen mukaan vuonna 2014 painettujen sanomalehtien ilmoitustuotot muodostivat hieman yli 80 prosenttia kaikista sanomalehtien ilmoitustuotoista (kuvio 9). Ainakaan toistaiseksi sanomalehdet eivät ole pystyneet digitaalisen mainosmyynnin kasvattamisella korvaamaan ilmoitustuottojen huomattavaa laskua painetuissa sanomalehdissä. Vaikka julkisesti noteerattujen sanomalehti-yhtiöiden digitaalista tuotteista ja palveluista saadut ilmoitustuotot muodostavat yhä suuremman osan niiden kokonaismainostuotoista, johtuu tämä Pew Research Centerin State of the News Media -raportin mukaan enemmän painetuista tuotteista saatujen ilmoitustuottojen laskusta kuin digituottojen kasvusta. Arvion mukaan digitaaliset ilmoitustuotot olivat noin 29 prosenttia julkisesti noteerattujen sanomalehti-yhtiöiden kokonaisilmoitustuotoista vuonna 2016.

**Kuvio 9. Sanomalehtien ilmoitustuotot 2003–2014 (Lähteet: Newspaper Association of America; BIA/Kelsey ja Pew Research Center).**

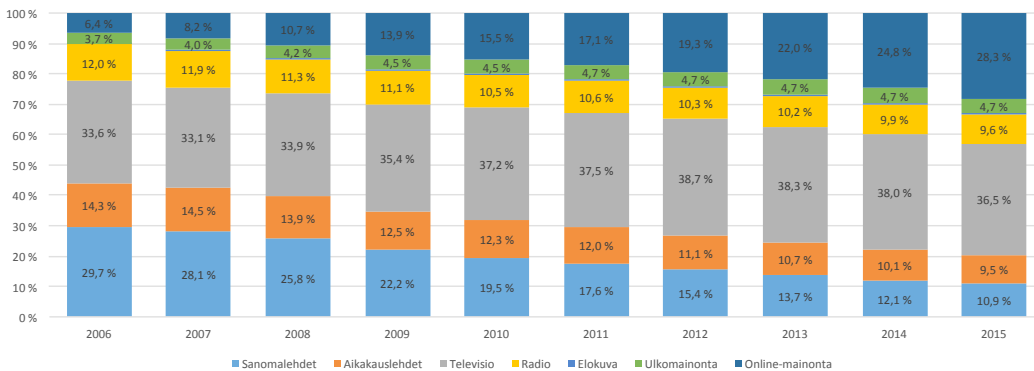


**Kuvio 10. Sanomalehtien ilmoitus- ja levikkituotot 2000–2016. (Lähde: News Media Alliance ja Pew Research Center).<sup>5</sup>**



Digitaalisen siirtymän ja verkkomedian vahvistumisen seurauksena mainonta perinteisissä medioissa on vähentynyt selvästi, ja vuosituhaten vaihteen jälkeiset vuodet ovat olleet vahvaa verkkomediainonnan kasvun aikaa (kuvio 11). Vuonna 2006 verkkomediainonnan osuus mediamainonnasta oli Yhdysvalloissa hieman yli kuusi prosenttia, josta se nousi vuoteen 2015 mennessä jo lähes 30 prosenttiin (28,3 %). Verkkomainonnan osuus mediamainonnasta onkin noussut toiseksi suurimmaksi televisiomainonnan jälkeen ja on jo lähes kolminkertainen sanomalehtien osuuteen nähden. Tarkasteltaessa verkkomainonnan kehitystä ja mediamainontamarkkinoiden rakenteen muutosta on välttämättä huomioida ns. perinteisen median ulkopuolelta tulevat toimijat. Interactive Advertising Bureauun mukaan digitaalisten mainostuottojen kasvu on Yhdysvalloissa voimakasta ja vuonna 2016 verkkomainonnan kokonaisarvo oli noin 72,5 miljardia dollaria. Asiantuntija-arvioiden mukaan suurin osa verkkomainonnan kasvusta ja volyyymista menee kahdelle yritykselle, Googlelle ja Facebookille.

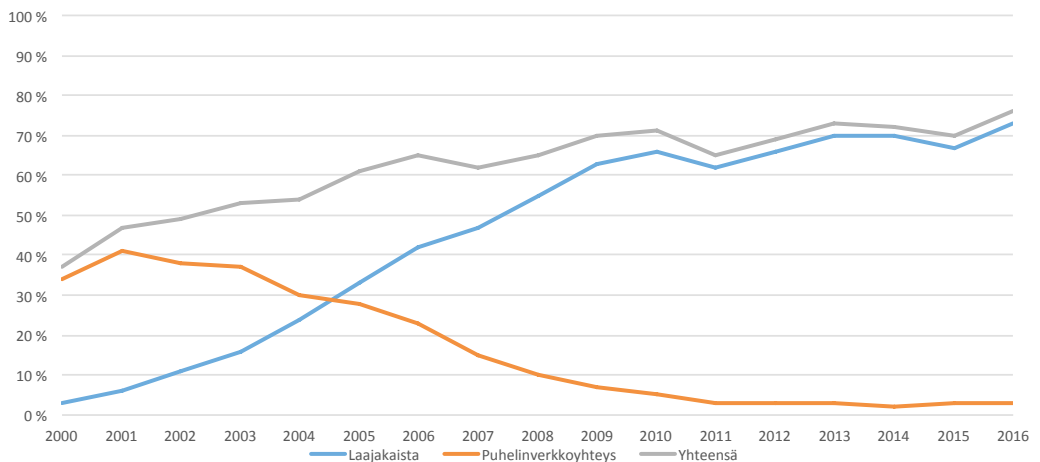
**Kuvio 11. Mediamainonnan jakautuminen eri medioihin 2000–2015 (Lähde: World Press Trends).**



<sup>5</sup> Kuvio perustuu vuoteen 2012 asti News Media Alliancen (entinen Newspaper Association of America) julkaisemiin tietoihin. Vuodesta 2013 eteenpäin tiedot perustuvat Pew Research Centerin analyysiin seitsemän julkisesti noteeratun yhdysvaltalaisen sanomalehtiyrityksen tilinpäätöksistä. Analysoitujen yritysten omistamat sanomalehtinimikkeet edustavat kattavasti noin neljännestä kaikista Yhdysvalloissa ilmestyvistä sanomalehtinimikkeistä. Ilmoitus- ja levikkituottojen vuosimuutoksen prosentuaalinen muutos suhteutetaan NMA:n ilmoittamiin edellisen vuoden tuottoihin. Menetelmän testauksessa vuosittaiset muutokset aikavälillä 2004–2012 vastasivat yleensä NMA:n ilmoittamia muutoksia.

Euroopan unionin (EU-28) kotitalouksista vuonna 2016 noin 83 prosentilla oli kiinteä ja/tai mobiililaajakaistayhteys. Vastaava luku Yhdysvalloissa oli vastaavana ajankohtana noin 73 prosenttia (kuvio 12). Tämän lisäksi noin kolmella prosentilla Yhdysvaltojen kotitalouksista on internet-yhteys lankapuhelinliittymän kautta. Verrattuna esimerkiksi Pohjoismaihin, joissa kaikissa yli 90 prosentilla kotitalouksista on internet-yhteys, on internet-yhteyksien määrä kotitalouksissa Yhdysvalloissa varsin alhainen.

**Kuvio 12. Internet-yhteyksien osuus kotitalouksissa Yhdysvalloissa (Lähde: International Telecommunication Union).**



## SANOMALEHTIEN TALOUSTILANTEEN KEHITYS

Newspaper Association of America (NAA), nykyinen News Media Alliance, lopetti koko sanomalehtialan kokonaisliikevaihto- ja tuottotietojen julkaisemisen vuonna 2014. Viimeisen toimialajärjestön antaman tiedon mukaan sanomalehtialan kokonaistuotot vuonna 2013 olivat yhteensä 37,6 miljardia dollaria, joista ilmoitustuottojen osuus oli 23,6 miljardia ja levikkituottojen 10,9 miljardia dollaria. Tämä on johtanut tarpeeseen kehittää uusia tapoja arvioida luotettavasti ja johdonmukaisesti toimialan liiketaloudellista kehitystä. Yksi tapa on analysoida tilinpäätöksiä julkisesti noteeratuista sanomalehti-yhtiöistä, joiden kokonaismäärä on viimeisten kymmenen vuoden aikana laskenut yhdeksästä seitsemään. Suurin ongelma koko toimialan analysoinnissa vain julkisesti noteerattujen yritysten tietojen perusteella on se, että useimmat sanomalehdet ovat yksityisomistuksessa. Pörssi-yhtiöiden omistamat sanomalehdet edustavat noin neljäsosaa kaikista 4–7-päiväisistä sanomalehdistä ja lähes neljäsosaa kaikista sanomalehdistä. Näiden perusteella ei kuitenkaan voida laskea toimialan kokonaisliikevaihtoa, mutta niiden tiedot antavat melko hyvän kuvan vuositason tapahtuneista muutoksista.

Viime vuoden presidentinvaalien jälkeen osa suurista sanomalehdistä ilmoitti digitaalustensa määrän kasvaneen huomattavasti. Tästä huolimatta sanomalehtialan tilanne on kokonaisuutena tarkasteltuna haasteellinen, sillä näiden muutamien lehtien menestys ei ole heijastunut koko alan kehitykseen. Päivälehtien kokonaislevikki, painettu ja digitaalinen levikki yhteenlaskettuna, jatkoi laskuaan (-8 %) kuten 28 vuotena peräkkäin. Kokonaislevikin laskun lisäksi sanomalehtien kokonaisilmoitustuotot pienenevät merkittävästi (-10 %). Toimialan haasteellinen tilanne heijastuu myös alan työllisyyteen – sanomalehtialan kokonaishenkilöstömäärä on vuodesta 2004 laskenut 40 prosenttia.

# SANOMALEHDET MUUTTUVASSA TOIMINTAYMPÄRISTÖSSÄ

Osana tutkimushanketta tehdyn haastattelututkimuksen tarkoituksena on ollut selvittää yhdysvaltalaisen sanomalehtiyhtiöiden viime vuosina valitsemissa ja kehittämissä liiketoimintamalleja sekä moneilään olevia uusia kokeiluja. Tarkastelemme haastatteluita neljän keskeisen teeman kautta: A) kansalliset, alue- ja paikallislehdet Yhdysvalloissa, B) ajattelumallien muutos ja innovaatiot, C) sanomalehden tulevaisuus painotuotteena, D) kuluttajien sitouttaminen. Näiden teemojen sisällä haastattelemamme sanomalehtialan edustajat puhuvat muun muassa perinteistä liiketoimintaa täydentävistä tai korvaavista liiketoimintamalleista ja tulonlähteistä, digitaalisista tuotteista ja palveluista, sosiaalisen median vaikutuksesta sanomalehtiin, lukijasuhteesta ja lukijoiden sitouttamisesta, yhteistyöverkostoista, median murroksen haasteista kokonaisille ajatus- ja toimintamalleille sekä tulevaisuuden suuntaviivoista toimintaympäristön muuttuessa. Haastatteluiden perusteella Yhdysvalloissakaan ei ole löydetty yhtä ylivertaista uutta liiketoimintamallia, vaan menestyneillä julkaisuilla on useita erilaisia ratkaisuja.

## A. KANSALLISET, ALUE- JA PAIKALLISLEHDET

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Suurimpien haasteiden kanssa kamppailevat suurten kaupunkien sanomalehdet (ns. metro newspapers). Ne ovat riippuvaisia painetusta lehdestä saatavista tuloista, jotka kuitenkin hiipuvat. Samanaikaisesti monessa lehdessä digitoimintojen kehitys on ollut hidasta, vaikka monet kuluttajat odottavat nimenomaan digitaalisia palveluita. Sanomalehtien omistaminen keskittyy ja eri toimintojen virtaviivaistaminen ja kustannusten leikkaaminen jatkuvat voimakkaina, kuten esimerkiksi suuren sanomalehtitalon Gatehouse Median tapauksessa.

They [metro newspapers] are probably in one of the hardest situations right now because their markets are disrupted. These are big metropolitan cities. The people there are sophisticated digitally. They all have the latest smartphones and they're all plugged into the internet culture and know the latest stuff going on in the world, have high expectations of their media that they use. There's pressure from these guys like you have to be on the cutting edge of innovation. You have to do all the best stuff well, but you're not going to be the *New York Times* where you can get as big and as rich as they are. They [metro newspapers] are a little bit squeezed in the middle, and they also have more competition. (...) It's a tough situation there. (#U27/RMA)

So I think you can be small and local and tightly embedded in your community and probably be okay and then you can be big and international. I don't know if you can be medium sized very effectively. I think that's the hardest that's ... it's a very tough proposition. It doesn't mean that someone won't figure it out. (...) So there's a sort of size gap that you can be on either end of the spectrum in my estimation but not in the middle. (#U23/CM)

Toisaalta löytyy myös esimerkkejä perinteisistä sanomalehtitaloista, jotka ovat luoneet täysin uutta globaalia digitaalista liiketoimintaa (*Deseret Digital Media*) tai hajauttaneet tulonmuodostusta onnis-

tuneesti (*Dallas Morning News*). Yhteistyö ja verkostoituminen mainostajien kanssa vaikuttaa olevan yksi keskeinen teema monessa mediataloissa. Tähän vaikuttaa etenkin sähköisen kaupan nopea kasvu, jossa erityisesti Amazon on nakertanut monien perinteisten sanomalehtimainostajien liiketoimintaa.

Pienissä paikallisjulkaisuissa taas on hyvin erityyppisiä tapauksia: jotkut pitäytyvät uskollisesti painetussa lehdessä ja myös menestyvät taloudellisesti siinä mainos- ja/tai tilausmyynnin ansiosta (esimerkiksi *Coronado Eagle & Journal*), toiset ovat puolestaan kokonaan digitaalisia ja toimivat jäsenyyspohjaisen tilausmallin mukaan (kuten *Voice of San Diego*).

## SANOMALEHTIEN KUOLEMANSPIRAALI

Haastatteluissa ilmi tulleen negatiivisen näkemyksen mukaan monia sanomalehtiä uhkaa tai ne ovat jo "kuolemanspiraalissa", josta on vaikea vapautua. Kun lehdet leikkaavat henkilökuntaansa, myös mediatuotteen antia ja laatutasoa on vaikea pitää yllä. Tämä voi johtaa tilauksien menettämiseen, mistä seuraa tarvetta lisäsäästöille. Toisaalta sanomalehdillä on usein tietty joukko "ydinlukijoita" (core readers), jotka pysyvät tilaajina tuotteen tilasta ja tilaushintojen noususta huolimatta.

They [newspapers] are, not all of them, but most of them are in a death spiral. Which is, fewer people are reading the paper, fewer people are advertising for all kinds of reasons above, and competition, and the internet. Revenue's going down, therefore they cut the staff, therefore the product becomes thinner, and it becomes less essential to people's lives. The less essential it is, the fewer people subscribe. (#U28/MCA)

Very loyal core of subscribers who really like the product and feel familiar with the product. They're comfortable with it. The business challenge is that we know from surveys that that's a considerably older demographic than is going to lead us into any kind of future. Those, I mean right now that cohort is really, those are the customers that are keeping us going, because they have stuck with us through a multitude of rate hikes. The challenge is to migrate them into paying digital customers. Instead of having folks cancel their papers, as many continue to do, migrate them when they do that to a digital subscription, which is cheaper but involves less cost in terms of distribution and production. That's really, I think, the strategy, the grand strategy of every American newspaper, is to migrate folks to digital subscriptions and to draw down sort of the manufacturing and distribution costs of print. (#14/CM)

I don't see any circumstance in which the American newspaper business is bigger tomorrow than it is today. It's going to keep shrinking. I think metro newspapers are going to keep shrinking and keep shrinking and keep shrinking. They offer very little to advertisers that Facebook and Google don't at a more targeted, efficient level. Local news, smaller papers I think will become modestly cash flow positive, skeletons of their former self. (#U11/MA)

Jos sanomalehti on niin kutsutussa kuolemanspiraalissa tai hitaasti luisumassa epäonnistumiseen, sen voi olla vaikea saada lukijatuottoja kun lehti pienenee jatkuvasti ja on siten vähemmän houkuttelevampi kuin ennen.

What a lot them [newspapers] are turning to is, "We're gonna get subscribers." And then, the problem becomes, well you're trying to get subscribers for a product that's actually much diminished from what it was. People know that. You don't have the ability to drastically improve the product, because you're so much smaller than you used to be. (#U28/MCA)

Vielä kyynisempi näkemys on se, että jotkut sanomalehtiä omistavat yritykset yrittävät vain “korjata sadon” (mahdollisimman paljon voittoa) ennen kuin kuolemanspiraali päättyy kuolemaan.

It's a harvesting strategy, in which you admit that this a dying product. It's got a certain number of years to live, like a patient with cancer or something. It's managed decline. You try to manage the decline of the product and the death of the product. That you can extract the most profits out of it before it keels over and collapses. (#U28/MCA)

Erytisesti ketjuihin kuuluvat sanomalehdet voivat heikentää asemaansa etäännyttäen paikallisesta yhteisöstä sekä tekemällä liian samankaltaista tuotetta kuin muut sanomalehdet.

I mean, one of the things that happened to American newspapers that I really blame corporate consolidation for is that it became totally disconnected to their community, so no wonder no one wants to read them. They're not that important to read, right? (#U33/MCA)

One of the problems I think on the consolidation issues has been is they've tried now to basically standardize everything and exchange so much content, and production, among their ownings, that essentially they're making them same rather than unique. (#U33/MCA)

## KILPAILU JA YHTEISTYÖ

Yhdysvaltalaisissa sanomalehdissä digitaaliset julkaisualustat aiheuttavat keskeisen dilemman uuden kilpailuasetelman myötä. Lehdet kilpailevat mainostuloista näiden uusien online-toimijoiden kanssa, ja joissakin tapauksissa tämä on johtanut jopa uudenlaiseen sisältöyhteistyöhön lehtien välillä yhteistä “vihollista” vastaan.

Yet the revenue is overwhelmingly from print ads. That's kind of the dilemma of the industry in a nutshell, right? That the business model is evaporating, and nothing digital has shown up to replace it. My own view and one I think is rapidly becoming shared by many of the newspaper and news executives is that the platforms are really the enemy in this equation. (#U33/MCA)

They [newspapers] don't have anything approaching the advertising products that online competitors can offer, either in terms of data or in terms of format or in terms of experience, anything. They are misaligned with today's news habits. News has shifted from being something that you consumed in a habit-driven, regimented way. I'd sit down with my cup of coffee and read the newspaper. I come home from work and I watch the newscast, and news is now much more about interruptions and spare moments of the day. (#U11/MA)

Sanomalehdillä on kaikkiaan monitahoinen suhtautuminen julkaisualustoja tarjoaviin teknologia-yrityksiin ja sosiaalisen median palveluihin. Toisaalta niiden kanssa olisi tehtävä yhteistyötä ja oltava sosiaalisen median kanavissa läsnä, toisaalta sanomalehtiyhtiöt kilpailevat niiden kanssa mainosrahoista. Tämä onkin iso haaste, johon ei ole yhtä kaikenkattavaa ratkaisua.

There is some local competition, but I think you're right, I mean our real competition is not just the national outlets like the *Times* and the *Post* and CNN. Both on the print side and on the digital side. It's the attention competition. It's Facebook, it's Twitter. These are distribution platforms for us, but they're also attention competitors. Google and Facebook are huge. We're little mice in the world of digital advertising compared to them. (#U14/CM)

Google and Facebook get close to 70% of the digital advertising out there. I think our biggest challenge is really kind of intermediaries who have basically gotten in the middle of newspaper's direct relationships with advertisers and with our customers, and now are providing platforms to get content out there and deliver advertising. I think that's really the biggest challenge. (#U21/RMA)

There are two reasons not to do [Facebook] Instant Articles, right? One is, I don't want to have Facebook in the middle of my relationship with the reader. I don't want to give Facebook the data that I should be gathering, like sort of a strategic reason. Then the other reason is, I just make less money going through Facebook. I thought, Facebook isn't going to budge on the first one, because they want to be that intermediary. But I thought Facebook would make it such a good deal that they would make it so the second reason would not be why publishers are backing out. My impression is that both those are significant reasons, but the second one is a pretty important one, too. (#U11/MA)

Suhtautuminen Googleen ja Facebookiin vaihtelee, mutta yleensä nähdään kuitenkin olevan vahva tarve tehdä yhteistyötä näiden jättien kanssa, joiden avulla mediatalo pystyy hankkimaan uusia asiakkaita.

Many people discover our content, and become more familiar with our brands, so it expands our reach significantly, and we obviously sell Facebook advertising to small businesses. That's been a really fast growing category to represent our local businesses and their digital advert system. So you know, as much as I'd like, when I look at the size and growth trajectory of Facebook, not nearly, but we wouldn't have the traffic today, actively have people accessing our content nearly to the extent were it not for the distribution networks. (#U20/CEO)

Facebookin Global News Partnerships -yksikön johtajan Campbell Brownin mukaan Facebook haakee vielä roolia ja muotoa, jolla yhtiö voi tukea paikallisia mediayrityksiä ja Brown odottaa, että vuoden sisällä nähdään minkälaisista ratkaisuksista voisi olla kyse.

I think everyone's number one priority right now is monetization and I think what we can do [...] to support different ways that people are trying to find sustainable business models should be a big part of our focus right now. Part of the challenge, as you know, is that there's no silver bullet, there's no one-size-fits-all solution to this (Brown, 2017).

Brown vakuuttaa, että Facebookin kiinnostus on aito ja että yhtiön edustajat viettävät paljon aika mediayritysten kanssa löytääkseen ratkaisuja, olivatpa ne sitten maksumalleja, sisältömarkkinointia tai jotain muuta. Facebook on monella tavalla kopioinut Googlen tapoja tukea mediaa ja journalisteja kurssilla ja työkaluilla, mutta ei vielä rahalla. Campbell tunnustaa, että hän ei tiedä minkälaisena media näyttäytyy edes viiden vuoden päästä.

What I do know is that the platforms are part of the ecosystem. There's no denying that, and that means that we have a responsibility that we can't walk away from, we wouldn't want to walk away from. Our interests on this are aligned. We can't have informed communities without journalism (Brown, 2017).

Amazonin omistaja Jeff Bezos puolestaan vaikuttaa Yhdysvaltojen sanomalehtiin kahdella tavalla. Hänen omistuksessaan *The Washington Post* on noussut alueellisesta lehdestä valtakunnalliseksi ja osittain globaaliksi toimijaksi. *The Washington Post* toimii myös esimerkkinä vahvasti tuotekehitykseen ja digitaalisiin toimintoihin panostavasta lehdestä, jossa ei tyydytä keskinkertaisiin ratkaisuihin. Samaan aikaan Amazon vaikeuttaa monien pienempien lehtien asemaa siten, että se syö digitaalisen kauppapaikkansa kautta vaikeuksiin monia kivijalkakauppoja, jotka puolestaan ovat merkittäviä mainostajia.



The one coming on strong I keep in mind, I'm looking at, is Amazon. What are they going to do? Is it going to be the Big Three [with Facebook and Google]? They're making moves, now, to get into spaces that were predominantly dominated by Facebook and Google. I think Amazon's one to keep an eye on. (#9/CM)

The business model's just been turned upside-down, and the people who use to be our, the people who are our bread and butter, those businesses are on life support, right? Sears, K-Mart, RadioShack went out of business. (#U34/E-in-C)

One other interesting thing about meeting with all the top advertisers for the *LA Times* is that every single one from CVS and Walmart all the way down to the local camera store, every single one, their number one fear and concern was Amazon. Every single one. I basically came to the conclusion that if I could figure out how to fight Amazon, I would save the newspaper. Right? (#U33/MCA)

Gatehouse Media, jolla on suuri joukko lehtiä lähinnä isojen kaupunkien ulkopuolella, on myös saanut tuntea miten asiakkaat – pienet ja keskisuuret paikalliset mainostajat – joutuvat laittamaan ovensa kiinni kun Amazon jyrää heidän ylitsensä. Tuhannet kaupat ovat joutuneet lopettamaan liiketoimintansa, kun asiakkaat ostavat tavaransa internetistä ja Amazon toimittaa tuotteet muutamassa tunnissa kotiovelle.

This first quarter, I think nationally in the United States, there have been between 3,500 and 4,000 store closings, and that's anticipated to be over 8,000 by the end of this year, which is a staggering. (#U20/CEO)

Samaan aikaan Bezosin *The Washington Post* tekee yhteistyötä pienten lehtien kanssa, mikä on esimerkki uudenaikaisesta bisnesajattelusta, joka ei ole ollut tyypillistä Yhdysvalloissa. Sisältöyhteistyö on yleensä tapahtunut saman konsernin sisällä ilmestyvissä lehdissä. Laajemman sisältöyhteistyön sijaan tavallisempaa on ollut yhteistyö mainosmyynnissä ja painotöissä.

Taloudellisesti hyvinvoivillakaan alueilla ilmestyvät lehdet eivät välttämättä menesty taloudellisesti muita paremmin. Embarcadero Media, joka on perustettu 1971, julkaisee ilmaista *Palo Alto Weekly* -viikkolehteä yhdellä USA:n rikkaimmista alueista, Kalifornian Piilaaksossa. Silti yhtiö kamppailee samojen haasteiden kanssa kuin muutkin sanomalehdet: Ihmiset ostavat tuotteita yhä enemmän suoraan verkosta, etenkin Amazonista.

Like all media, we're contending with the problem that our core advertisers, who used to be small retail businesses that line the shopping districts, they are less and less a part of our revenue stream, because they're going out of business, they don't have the resources to invest in high price marketing any longer and they're just barely staying alive themselves. (#U25/CEO)

Piilaaksossa kiinteistöjen hinnat ovat erittäin korkeita eikä vähittäiskaupalla ole enää varaa kaupapaikkaan. Mainostulojen pudotessa Embarcadero Media yrittää saada vähittäiskauppaa tekeville yrityksiltä muita asiakkuuksia, esimerkiksi internet-sivujen tekoa.

We can help them create a website, we can convert an existing website to a mobile responsive design website, we can help them by writing blog posts for them, for their own websites, we can do reputation management, we can place Facebook ads for them, we can do Facebook posts for them, we can get all their business listings and all the websites for them. (#U25/CEO)

## B. AJATTELUMALLIEN MUUTOS JA INNOVAATIOT

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Asiantuntijahaastatteluissa kävi selkeästi ilmi, että yhdysvaltalaiset sanomalehdet ymmärtävät suhteellisen hyvin tämänhetkisen muutostilanteen ja ovat valmiita reagoimaan siihen muuttamalla toimintaansa ja jopa ajatusmallejaan.

I would say for the most part, responsiveness is really good right now in the US. Some of that is by necessity. Disruption has reached a point where people, there's no doubt in their minds that they have to find new ways of doing things and they have to be open to change. I would say if we went back 8 to 10 years ago even, you would have a significant number of people in some of these news organizations that would have still been a little bit hesitant. They would have still been a little bit, do we really need to rock the boat that much? We still make good money from print and things aren't really moving that fast. We should innovate but we don't have to go crazy here. (#U27/RMA)

There's a lot of conversation around audience, and we've moved past digital-first. We're now on to audience-first and how do you make sure that you are meeting an audience where they are? That you are thinking about how you present news in terms of format and in terms of platform with a focus on what analytics, for instance, are telling you. Of course, there's still old fashioned news judgment, but we do have all of these tools at our fingertips to help us figure out how to grow audience and how to engage with the audience. So, I feel like that is probably the biggest trend that we're seeing right now across the industry when it comes to "digital" is that we're actually past digital-first. We've moved on to either platform-optimal or audience-first. We're talking again about storytelling and how you make sure you find the platform and the format and the time in which you're going to reach the ... Not the broadest audience, but the right audience for each kind of content. (#U24/CM)

We don't think about customer service in the way that other B-to-B companies or B-to-C companies, I guess is what I mean. Meaning we don't think of our circulation department as our audience engagement team and that's what they really are. If we're really going to be ultimately a company that depends on digital subscription revenue, we would be thinking about those 82,000 people not as a scale business but as a niche business and cultivating one-on-one relationships with them through our circulation department. (#U24/CM)

Yrittäjämäinen asenne on innovoinnissa tärkeässä roolissa. Erään haastateltavan sanoin sanomalehdillä on ehkä taitoa havaita bisnesideoita, mutta ei aina taitoa hyödyntää niitä - tarvittaisiin yrityksen sisäistä innovointia.

The ability for people in our industry and companies in our industry to recognize entrepreneurial ventures and have the capability to grow them and develop them is also a huge difference maker. We don't have the internal capability to take a business idea and grow it and let it sort of flourish. We can recognize the idea, but then we don't do anything with it and we lose it. And that's where I think the future of the business is gonna be, that those businesses that are really and truly entrepreneurial and have that expertise in-house and think that way will find other revenue streams that will be huge contributors to the bottom line. (#U12/CM)

Uusien palveluiden luominen sanomalehden ydinliiketoiminnan ympärille ja tulovirtojen eriyttäminen on selkeä trendi. *Dallas Morning News* ja Utahissa sijaitseva *Deseret News* ovat esimerkkejä yhtiöistä, joissa tämä on edennyt nopeasti. *Dallas Morning News* on keskittynyt laajentamaan yrityksiin, jotka liittyvät sanomalehtiliiketoimintaan. Se on ostanut yhtiöitä, jotka keskittyvät tuotteiden lisensointiin (merchandise licensing), markkinoinnin automaatioon (marketing automation) ja kehittä-

tyneisiin hakupalveluihin (high-end search). Lisäksi *Dallas Morning News* on perustanut itse uusia digitaaliseen markkinointiin ja sisältömarkkinointiin keskittyviä yhtiöitä. Samaan aikaan yritys on ulkoistanut tuotantoprosesseja, joita se ei pidä ydinalueenaan, kuten sivusuunnittelu. Nämä yritykset tukevat sitä pääsyyssä kiinni mainostajien markkinointibudjetteihin, jotka muuten menisivät enenevässä määrin Facebookille ja Googlelle.

Before we become irrelevant to these companies [advertisers], we need to find ways that they can invest these growing marketing budgets with us again and recapture some of that share we lost. (...) So you might as well get all the money you can from them before you even start spending money to acquire new customers. So we focused on these customers and what their needs would be. (...) So we started deciding that we're going to build out what we call a marketing solutions ecosystem, and we're going to get away from the top of the funnel on awareness, and we're going to get down to the bottom of the funnel, which is attributable results from the marketing channels that you use. (#U17/CEO)

Merkittävää on, että näillä uusillakin yhtiöillä operoidessaan *Dallas Morning News* toimii media-liiketoiminnassa eikä etene itselleen tuntemattomille alueille. 175 vuoden kokemus julkaisuliiketoiminnasta tuo tähän painoarvoa:

So I think owning 7/11s [convenience stores] is a good business, but it's not what we do. We do two things: we publish content that people want, and I believe will pay for, and we help companies sell goods and services. That's what we've done for 175 years. Publishing, subscriptions, advertising, marketing, sell goods and services. Let's stick to the things we know what to do and not go invest in things that we have no idea. (#U17/CEO)

Jotkut yhtiöt, kuten Gatehouse Media, kohdistavat palveluiden tarjontaa pienille ja keskisuurille paikallisille yrityksille ja hakevat uusia tuottoja muun muassa tapahtumien järjestämisestä. Myös perinteiset sanomalehti-yhtiöt kuten *San Diego Union-Tribune* tai *Miami Herald* saavat jonkin verran tuloja tapahtumien järjestämisestä, mutta käytännössä niillä 60 prosenttia tuloista tulee edelleen mainonnasta ja 40 prosenttia tilaustuotoista. Eräs haastateltava kommentoi jakauman muutosta seuraavasti:

Within five years that will be the opposite. Pretty strong change. We just modeled this actually. The Monday through Friday paper, that will be more than 70% circulation dollars. The advertising is moving to the weekend. (#U26/E-in-C)

Tästä kommentista käy ilmi myös toinen trendi, painetun lehden tuottojen siirtyminen kohti viikonloppunumeroita. Yhdysvalloissa erityisesti sunnuntain (painetun) lehden merkitystä korostaa se, että sen väliin on vielä toistaiseksi helppo myydä mainostajien liitteitä, joissa on paljon alennuskuponkeja.

I think the real issue is that we're headed to a place where the only day that makes economic sense is Sunday, and that's only because of pre-print, which you know is another word for coupons, right? (#U33/MCA)

Osa ihmisistä jopa toivoo sanomalehden jakavan mainosliitteensä heille, vaikka he eivät tilaa itse lehteä.

The newspaper really is the marketplace for advertising inserts and coupons. People are saying, "I may not have time to read the newspaper, but send me the ad-inserts". The fact that they're opting-in, you can go back to the advertiser and say, "These people really want that". Which means, they're going to read it. Versus the mail where they may just pitch it into the trashcan. That's called Sunday Select Program in a lot of newspapers. They offer the ad-inserts without the newspaper. (#U21/RMA)

Näin sanomalehtikustantajat tekevät tavallaan kahta tuotetta kerralla - sanomalehteä mainosliitteineen ja pelkistä mainoksista koostuvan suoramainonnan jakelua.

Gatehouse Media on laajentunut nopeasti ja on nykyään lähes 600 paikallisen ja alueellisen julkaisun yhtiö. Julkaisuista 130 on päivälehtiä. Yhtiö ei kuitenkaan näe itseään vain sanomalehtikustantajana, vaan kunnianhimoa on myös kuulua johtaviin markkinoinnin ja teknologiapalveluiden tarjoajiin pienille ja keskiuurille yrityksille lehtien ilmestymisalueella.

With two million small and medium-sized businesses in our market we have 1,300 in-market sales executives who we cross-trained to sell a variety of different services to those local businesses. (#U20/CEO)

Kasvualoitteet kuten palvelut yrityksille, digitaalisen markkinoinnin palvelut, tapahtumat, painopalvelut ja B2B-julkaiseminen tuovat jo kolmanneksen Gatehouse Median kokonaisliiketoistoista. Palveluihin kuuluu myös sähköpostimainontaa, sosiaalisen median hakukonemarkkinointia ja optimointia sekä maineseurantaa (display digital, retargeting, email marketing, social media search engine marketing and optimisation, reputation monitoring).

Sama kehitys kohti liiketoimintojen laajentumista näkyy myös joissakin paikallislehdissä. Paikallislehti on usein näkyvä ja luotettu toimija paikkakunnallaan, jolloin se pystyy hyödyntämään brändinsä tunnettuutta. Laajentuminen uusille liiketoiminta-alueille saattaa kuitenkin vaatia sellaisia resursseja, joita monilla sanomalehtiyrityksillä ei ole, edes suurimmissa kaupungeissa.

They [US newspapers] really decided early on several years back that there have to be other slices of this pie if this is going to work. We can't just keep thinking that mixing print and digital advertising are going to somehow magically rise up and sustain us as a business. They really aggressively have gone out and built marketing services, business to business services. They do marketing and other advertising services, client consulting, ad planning, offline events like real in-person community events that they'll plan for people. That's a really promising model, but it requires you to make investments in growth. That's I think a hard thing for a lot of the other markets to do. Say I gave you a business plan and you're running one of these paper that says you can make \$5 million more next year in revenue, but I need you to spend \$2 million to get it. Hire a certain number of people and build the business line to do it. A lot of them, these markets and other owners just aren't in a position to say, yeah, you can have the \$2 million. They're just too squeezed for that stuff. It sounds like too much of a risk. That I think is a challenge. (#U27/RMA)

Sanomalehtien perinteinen massayleisöön ja kaksipuolisiin markkinoihin perustuva liiketoimintamalli ei selvästikään toimi enää kovin hyvin. Liiketoimintamallin toimivuutta edisti aikaisemmin sanomalehtikustantajien lähes monopolin kaltainen asema tietyillä maantieteellisillä alueilla. Tämä rajoitti kilpailua sekä yleisöstä että mainostajista. Toimintaympäristössä tapahtuneet muutokset ovat kuitenkin johtaneet siihen, että sanomalehtien on löydettävä uusia toiminta- ja ajattelumalleja. Tämä on perinteistä ja pitkään jatkuneesta menestyksestä johtuen synnyttänyt alalle tiettyä ajattelun jäykkyyttä. Ongelmat ovat usein enemmänkin talon sisäisiä kuin ulkoisia. Tulevaisuuden menestyksellä liiketoiminta vaatii uutta ajattelua esimerkiksi markkinoinnissa, asiakassuhteiden hoitamisessa, henkilöstöjohtamisessa sekä tiedonhallinnassa. Haastatteluissa esiin tulleiden näkemystenkin mukaan on turha aina syyttää ulkoisia tahoja ja "disruptiota" ongelmista ja odottaa tilanteen vakautuvan lähivuosina. Lehtien itse on oltava valmiita tekemään isoja muutoksia.

And you see an industry that is so incestual, so one-way thinking, that they're getting in their own way. Their ability to change, recognize change ... They scream disruption, yet every industry's going through disruption. And, their disruption happened in 2005 and 2006 and 2004 and 2003. They still think they're in disruption. Simply because they didn't, a) know how to recognize it and, b) they didn't want to change. You can blame that

on unions, you can blame that on leadership, but it's really, I would say, most of the problems that exist and the magnitude of them now, are because of the what happen inside the walls, not outside the walls. (#U12/CM)

I mean, the overwhelming one is the death of print advertising. That's the biggest one. In a more philosophical sense, they're all managing from a position of loss as opposed to actual, strategic planning. They're always thinking about what to cut instead of what to build. (#U11/MA)

We're transitioning, so I took what was five or six digital sales people and I made them specialists on respective teams. There is now a person to help coach, educate and engage with a client our bigger opportunities. Every sales person I have brought in now has digital experience. They're from Yahoo and Google and some of the other smaller technology companies. So, they come in understanding technology. (#U12/CM)

## YLEISLEHDEN MALLI MURTUU

Vähenevillä resursseilla toimivat sanomalehdet eivät enää pysty tarjoamaan "kaikkea kaikille" omalla alueellaan ja olemaan jonkinlainen tietyn alueen tai kaupungin yleissanomalehti. Tällainen sekatavarakauppa-malli ei välttämättä ole enää kiinnostava tilaajien kannalta, jotka saavat helposti suuren osan sanomalehden tarjoamasta sisällöstä muualta, lähinnä verkosta. Monessa haastattelussa nousi esiin se, että sanomalehtien kannattaisi miettiä mikä on niiden "ainutlaatuinen myyntiväittäjä" (unique selling proposition), siis sellainen niiden tuottama sisältö, joka tarjoaa lukijoille eniten lisäarvoa ja/tai jota eivät muut tarjoa. Sanomalehden on erotuttava ja tarvittaessa erikoistuttava – siis tarjottava sellaista sisältöä kuluttajille mitä muualta ei saa. Tämä ei tarkoita, että niiden pitäisi tarjota vain erikoissisältöä, mutta että ne pohtisivat entistä enemmän, mikä sisältö saa tilaajat pysymään uskollisina ja kenties mahdollistaa myös uusien tilaajien saamisen. Lehtien pitää tuntua "välttämättömiltä" mahdollisimman suurelle joukolle ihmisiä, eikä tähän nykymaailmassa enää riitä se, että lehti on alueen tai kaupungin oma lehti, jota luetaan pitkälti tottumuksesta. Toki "ydinlukijoille" tämä riittää, mutta he ovat vanhempaa väkeä ja poistuvat tilaajakunnasta lähinnä kuoleman kautta.

You end up having, for newspapers, this kind of general store vibe. In the media world, where everything is becoming much more specialized, and what's your affinity? That's a real challenge. There's no real easy fix for that. (#U14/CM)

That's a big transition for newspapers because the old value proposition in print and before the internet was really more like a general store. Once a day, we're going to get this big bundle that has a little bit about everything. It's summary of the world. Its value, isn't it amazing that in one place you can find a little bit about everything that happened in the world today? Now in digital, with the internet, that's not the problem people have anymore. You can get all kinds of sources about anything in the world. You can get access to it pretty easily. What people are missing is expertise and thought leadership and a sense of things that connect to their own identity and worldview. That's where a newspaper has to get to, is to say we're not just a thing with some information about this area. We're really indispensable to you on certain things that we do for you and how to bridge that gap. (#U27/RMA)

Can we be the first to tell you [the audience]? Can we tell you that news in a way that no one else has or could? Could we be the best? Can we report it more deeply, can we present in a unique and comprehensive way? (#U23/CM)

A big thing we see in our data, in our research is people want ... They really are connecting to news brands over topics which might actually be a specific topic or just a way they approach the news or something like that. There's a thing about it that draws them to it. It's not just like, well, this is the paper in my city so I guess I'll read it. (#U27/RMA)

Monesta suunnasta kuuluu viesti, että sanomalehdet liian pitkään ovat yrittäneet kattaa "kaikki" aiheet entiseen tapaan, vaikka ne eivät välttämättä edusta sitä ainutlaatuista sisältöä, joka on sen tietyn median valtti.

They [journalists] covered business, they covered sports, they covered politics. Right? They've covered neighborhood. In their minds, it was always a fiction, but it was a very potent fiction that they covered "everything". At a certain point in this spiral, where the newsroom had been cut from 200 people to 75, you can no longer have that illusion, that you cover everything. And now, you have to decide, these are our strengths. Well, it's really hard for "mainstream newspaper" journalists to do that. Because you need an approach, you need a philosophy, you need a theory, if you will, which is the last thing in the world they want, right? And they're just not very good at that. (#U28/MCA)

We, as in newspapers, used to be the general store, so we were like Wal-Mart, there's a little bit of everything and you could find it. And now we've gotta be like a specialty store where no, sorry, we don't sell toothpaste. (#U34/E-in-C)

Yksittäisen sanomalehden tehtävä on siis tuoda esiin, mitä lisäarvoa se tuo yleisölle ja käsittelemiinsä aiheisiin. Keskittyminen tarkoittaa, että suunnataan resurssit sinne, missä niistä on eniten hyötyä. Sanomalehtien johdon vahvuus ei perinteisesti ole ollut ymmärtää, mihin toimittajien panokset pitää suunnata.

If you have six people working on investigative instead of two, you're going to break stories that are going to make that paper and that product a lot more relevant than if you're just writing half-assed stories about 50 different topics. (#U15/CEO)

I think understanding unique priorities and unique capacities is something newspapers don't do well. (...) It's that a unique value proposition doesn't exist. (#U19/MCA)

Kun sekatarvarakauppa-malli yhdistyy väheneviin resursseihin, sanomalehti tekee itsestään sisällöllisesti ohuen. Siitä tulee ikään kuin kauppa, jossa on paljon hyllyjä mutta vähän tuotteita esillä. Tällainen kauppa ei ole asiakkaan näkökulmasta kovin houkutteleva.

You're losing a lot of money and the publisher is insisting that you lay some people off. You're never going to recover everything at the same level of quality if you're cutting people. You do still have the ability to decide, I can still find a way to make sure that we do a few things really, really well. I can put an extra person on this other beat over here even though overall we lost some people. (...) Publishers who just try to spread themselves thinner and thinner as they've shrunk their staff are going to have a hard time because now they just look like something that's thinner and thinner and people see less and less reason to pay for them. (#U27/RMA)

That's part of the problem, is trying to appeal to everybody with a thin product. No good. Again, it used to be good, it used to be fine, because that was the best that anyone could do. (#U27/RMA)

"Kaupan hyllyjen" täyttäminen uudella tavalla vaatii kipeitä ja varmasti myös ristiriitoja herättäviä ratkaisuja. Haastatteluissa esiin nousut selkeä toimintaehdotus on se, että sanomalehden kannattaa

harkita luopumista joistakin aihealueista, jotka ovat perinteisesti kuuluneet sen sisältöön. Näin ne voivat panostaa enemmän sellaisiin aihealueisiin, jotka niiden analyysin mukaan ovat keskeisiä lukijoiden kiinnostuksen ja sitouttamisen suhteen.

They [newspapers] are built to cover the news. What kind of news? All the news. (...) They're not very good at saying, "We're gonna not cover this because we just can't, and we're gonna specialize in this kind of a thing." That's hard to say. (#U28/MCA)

Yeah, and make hard decisions. I would say, one of the common things in a lot of those papers is they've made clear trade-offs. If your staff is half as big as it used to be and your investigative team is bigger than is used to be, you made some hard decisions in there to allow that to happen. I think you probably stopped covering some things that you'd covered for a long time. But you made that decision that, you know what? This might be an important topic, but right now, I'd rather have not somebody covering that and one more person doing investigative work. You have to stop covering some things. (#U15/CEO)

And it's thinking about, how can we use the resources we have to better serve our community in a way that no one else can? So how do you...and we've been doing this already for the last year and have seen success but it's making decisions about what to cover with your own staff, what not to cover. (...) It's like, do we have to cover it, and then do WE have to cover it. So yes we have to have the content but then again the second question is, do we have to create the content or can we get the content somewhere else and free up our own resources to cover stories or areas that are more important and that nobody else is gonna cover. (#U34/E-in-C)

I think the papers that have done well and the ones that are going to succeed are the ones that are willing to make pretty controversial decisions to pull away from something so they can double down on something they think is more core. (...) If you're the local paper and it [certain topic area] is not an essential thing for you, you should pull people off that beat and assign them things that you uniquely can do. A lot of those things are enterprise and investigative journalism and aggressive coverage of local government. I would double down on most of those things if I were the local paper and really take a hard look about whether I need to do everything else. (#U15/CEO)

“Kaljujen alueiden piilottaminen” (comb over) on osuva vertaus sanomalehdelle, joka yrittää olla samanlainen kuin ennen, mutta vähenevillä resursseilla. Kaljun pääläen ylle vedetyt hiukset voivat luoda tunteen, että kaikki on kuten ennenkin, vaikka sekä ihminen itse että muut tietävät, että hiukset ovat paenneet pääläelta.

When people are going bald, they do the comb over to make it look like they have more hair than they do. If you have half as many people in your newsroom as you used to have and you're trying to cover everything, it's sort of like a comb over. Like you're trying to cover more real estate than you have people to cover. And the similarity between the comb over and the coverage comb over is that people know the truth. People who do comb overs, everybody knows you don't have hair. You're not fooling anybody with the comb over. And by trying to cover a community with half as many people as you used to, you're not fooling the readers either. (#U15/CEO)

Paheksuttua monessa haastattelussa oli ”commodity news”, siis se että lehdet tuottavat liikaa bulk-kisisältöä ja tasapaksua kulutustavaraa, joka ei juuri eroa muiden tuottamasta sisällöstä. Taitavat journalistit laitetaan tuottamaan perusuutisia, jotka ovat samankaltaisia kuin muissa lehdistä ja verkossa. Ennen bulkkitavaran runsaus ei ollut niin ilmeistä, kun muu mediatarjonta ei ollut samalla tavalla saatavilla kuin se on nykyään verkon kautta.

What's a commodity? A commodity is a good that's the same everywhere. So, when you're producing commodity coverage, you don't necessarily know you're producing commodity coverage. (#U28/MCA)

So all this kind of commodity news that filled a lot of news papers, you didn't know was commodity because you weren't able to see it anywhere else. (...) And then when digital kind of leveled the playing field, so you can compare around, you're like, "Hold on a second. What is actually different and exclusive and unique to this title versus this title?" (#U35/CM)

There are a lot of good journalists out there and it's really critical that you husband your resources so you have the best journalists you can who are telling the stories and the best way you can and that you realize whether you are the first to tell the story, you're telling the story in a unique and really powerful way or it's a commodity and are you sure you should be doing it? (#U23/CM)

So we just have to make choices about what can we do really well and what can we do that differentiates us. And that's the kind of thing that we can do that differentiates us. Nobody's coming [to our metro newspaper] for a story about a bombing in Baghdad. That's kind of information that's a commodity now, and we're not experts and we don't have anybody there [in Baghdad]. (#U34/E-in-C)

Myös uutistoimistojen tuottama sisältö voidaan luokitella samaan kulutustavaruokkaan.

If you are a mid-sized US newspaper and you're running a lot of coverage from the Associated Press or a bunch of stories from the New York Times or The Washington Post or The Guardian or whatever, what is it that you're offering your readers that they can't get somewhere else? (#U23/CM)

If you have a decent sized to even big reporting staff and some of the mid-sized American newspapers still do, hundreds of reporters, two, sometimes three hundred and yet you're running a lot of pool coverage of the president, I just don't know what ... I kind of feel like that's not ... you haven't differentiated your project enough. (...) If you're going run a lot of Associated Press wire stories on the front page of a newspaper because that's the important news of the day, that news is everywhere. (#U23/CM)

Uutiskilpailussa voi menestyä tekemällä asioita eri tavalla. *Miami Heraldin* toimituksen strategia on kaksijakoinen. Toisaalta pääpanostuksena ovat paikalliset uutiset osavaltiotasolla Floridassa, toisaalta sisältö joka palvelee espanjankielistä väestöä julkaisemalla uutisia Karibialta sekä Väli- ja Etelä-Amerikasta, esimerkiksi Kuubasta, Haitista, Kolumbiasta, Venezuelasta ja Nicaraguasta. Miamiassa on paljon väkeä, joka on kiinnostunut tietämään, mitä näissä maissa tapahtuu. Lisäksi toimitus yrittää irrottaa resurssija tutkivaan journalismiin. Vahtikoiran rooli koetaan yhä tärkeäksi, jos ei tärkeämmäksi kun ennen johtuen siitä, mitä yhdysvaltalaisessa yhteiskunnassa tällä hetkellä on meneillään. Apuna tässä lehti käyttää vahvasti Chartbeat-ohjelmaa, jonka tarjoaman tiedon avulla voidaan tehdä radikaalejakin muutoksia lehden sisältöpanostuksissa, esimerkiksi siirtämällä lehden elokuvakriitikko kirjoittamaan kiinteistömarkkinoista, jotka ovat Miamiassa erittäin merkittävät.

So Chartbeat, which you see I've got on my desktop, I've got it on my phone, it's in the newsrooms, both sides, so every reporter has access to the numbers so they can see if their story is doing well or if it isn't. (...) So if they're not doing great traffic, how do we move people and create new beats that we think are gonna have more traffic and speak more to a sense of place. (...) So for instance, our former movie critic is now our real estate writer. And real estate is huge here. It's a great beat. We get incredible traffic. And the re-



ality is I can get movie reviews from the wires. It was nice to be able to have our own, we were holding onto him, you know. But it just came a point where you just realize it doesn't make sense. His traffic wasn't good and yet he's a very talented reporter and writer, and knows Miami so well, and so he moved and he's doing great. His traffic is doing great. (#U34/E-in-C)

Oleellinen opetus yhdysvaltalaisista sanomalehdistä on siis, että vähenevillä resurseilla ei voida enää tarjota kaikkea kaikille. On tärkeää miettiä, mitä juuri meidän lehtemme parhaiten tarjoaa ja mikä erottaa sen muista lehdistä ja uutislähteistä, erityisesti verkossa.

## C. MITEN KÄY SANOMALEHELLE PAINOTUOTTEENA?

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Sanomalehtiyhtiöillä on erilaisia strategioita painettujen lehtien suhteen. Esimerkiksi San Diegossa ilmestyvällä paikallislehti *Coronado Eagle & Journal*illa nettiversio on vain printin tukena, kun taas *Voice of San Diego* ilmestyy vain verkossa. *Coronado Eagle & Journalin* ilmestymisalueella paikallisena kilpailijana on hyperlokaali startup *Coronado Times*, joka perustuu vapaaehtoistyövoimaan. San Diegon suurin sanomalehti *San Diego Union-Tribune* puolestaan on printtivetoinen; lehti painetaan usean tunnin ajomatkan päässä olevassa painotalossa, mikä lisää jakeluun kuluva aikaa. Isoista yhtiöistä Gatehouse Media investoi painotuotteiden tekemiseen muillekin toimijoille ja haluaa olla siinä paras.

Isoista lehdistä *The Washington Post* pyrkii kasvattamaan erityisesti digilehden lukijakuntaa, ja hakee samalla globaalia yleisöä. Lehden painettu versio on suunnattu paikallisille lukijoille Washington DC:n alueella ja digitaalisten tuotteiden yleisö on koko maailma.

Whilst it's not our ... we would love if somehow our print subscription grew, [but] that's not our focus. It's not our goal, our goal frankly is to try to keep the rate of decline of print subscriptions relatively low. If we can manage the decline of print subscriptions while we dramatically increase the number of digital subscriptions and the size of the digital audience that's really the path forward. (#U23/CM)

Innovointi saattaa olla muita sanomalehtiä helpompaa juuri *The Washington Postin* kaltaiselle lehdelle, jolla on resursseja ja kykyjä tähän. Haastateltavan näkemyksen mukaan kuitenkin muidenkin sanomalehtien olisi pyrittävä innovatiivisiin käytäntöihin, jotteivät ne vain luisuisi hitaasti kohti epäonnistumista.

So we're not enthusiastic about failure but we try not to be slow about it. It's much worse to fail slowly. If your whole outlook is "How can we hold onto print?", and your metrics tell you you can't hold on to print, then that's a failing strategy and it's going to fail very slowly and by the time it has failed it'll be too late. If you look at your metrics and you say "Print is going down", then what are the other things you could do? (#U23/CM)

Monet sanomalehdistä ovat yhä paljolti painetun lehden aikakauden tuotteita, jotka on suunniteltu toimimaan ikään kuin uutistehtaan. Yleisesti ottaen sanomalehdet tietävät että jotakin pitäisi tehdä, mutta ne eivät ole kovin innovatiivisia uudistumisessaan.

They sort of cycle through different solutions, like becoming a digital ad agency. Trying to become more local, and some of them are becoming kind of clever at this. Like developing up a really good events business, would be another example, where you can see they're trying. It's not like they're unaware of what's eating away at their business. They are aware, but ... Truly out of the box attempts, ideas, you don't see that. That's why it's all spiraling down. (#U28/MCA)

So, part of the reinvention is we're carving out a print desk, which will be a significantly smaller operation than right now. I mean, we're behind everyone like in terms of moving in a digital, towards a digital future. We're years behind everyone. The vast majority of our room is still focused on the print, paper everyday, you know. (#U24/CM)

I think we're probably going to have a print product for the foreseeable future, but I don't know that we'll have one 10 years from now. I think the print product will probably end up looking something dramatically different than what it is now. For instance, maybe it's a weekly magazine in which there's essentially a round-up of all the best news of the week or something like that. I don't know, I'm making this up as I go along. (#U24/CM)

Voi ajatella, että sanomalehtiala on vasta saapunut sellaiseen tilanteeseen, jossa monet muut liiketoiminta-alat ovat jo olleet pidempään. Muutos on jatkuvaa, eikä sen loppumista kannata jäädä odottelemaan. Uutta "safe place" -tilannetta ei välttämättä enää tule.

I think we in the media sector are now just coming into the world that everyone else has already been in. The world changes. People keep moving and it's competitive. So figure out what's your advantage and what are you doing well and keep going at it. Just not be too discouraged by that, I think, because we were in this really artificial safe place where it was easy and we didn't have to change that much. (...) General Electric started off making light bulbs and now they make jet engines and now they make healthcare imaging devices and they have a whole business financing. They're nothing like what they were in the past. Every three to five years, you have to completely reinvent new lines of business and refigure out your consumers and launching new things. (...) I think for the most part, that stuff is an opportunity. The flipside of being disrupted and constantly disrupted is everyone else is too. If you're a publisher today who you feel like you're a little behind on this stuff and you didn't quite keep up to the big things from two years ago, the good news is that over the next two years, it's going to be a new game anyway. (...) If you keep wanting to wait to get to the next stable space where it's going to be comfortable then, it's going to stop changing, you're just never going to get there. (#U27/RMA)

## PAINETUN SANOMALEHDEN HINNOITTELU

Painettua sanomalehtiä koskevista huolestuttavista näkymistä huolimatta löytyy myös näkemyksiä siitä, että painettu lehti säilyy vähintään premium-tuotteena, joka myös hinnoitellaan korkeammalle kuin nykyisin.

I think print is going to be around for a long time. It may cost more, but it's still quite amazing as far as a printed product that's delivered to your door every day. The one issue is whether the advertising inserts will be there. I think they will, but there's been a major change in the retail industry. It might be less inserts, which might mean less content, but I still think there's going to be a premium product. (#U21/RMA)

Esiin tuli myös näkemys, että jossain vaiheessa lähitulevaisuudessa sanomalehden painamisesta tulee liian kallista. Lehdissä pohditaankin, miten korkealle painetun lehden hinta voidaan nostaa. Tämä pohdinta edellyttää myös yleisön segmentointia; erityisen tärkeää on identifoida "ydinasiakkaat" (core customers), jotka pysyvät tilaajina, vaikka tilauksen hintaa nostettaisiinkin. Jo vuonna 2009 *Dallas Morning News* korotti tilauksensa hintaa 40 %, mutta menetti vain 13 % tilaajista.

I would say the industry is in significant crisis, where almost six years of double-digit revenue decline, and getting pretty close to the point where it gets too expensive to print newspapers anymore. (#U33/MCA)

Particularly when you have a small potential subscriber base, as a local newspaper does, pricing is really hard because you don't want to price so high that you're only able to get a sliver of the market, but you don't want to price so low that if this is how you're going to be making money, it's a tough thing to navigate. Particularly also when you have, I mean, if you can get *The New York Times* digitally for \$15 a month, it's a hard sell to say, "Well, you should get *The Boston Globe* for \$30 a month." *The New York Times* is better than *The Boston Globe*. (#U11/MA)

There's a big difference between drive-by users who happen to come by your page and read a story. Those who are occasional visitors, semi-regular visitors and then core customers. And that you have to actually have strategies for all three of them. They're very different users. The core customers, which is a tiny percentage of the total traffic (...) So you have to figure out how to reach them, you have to figure out how to identify them, you have to sell them subscriptions. (#U28/MCA)

## D. SITOUTTAMINEN

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Lukijoiden sitouttaminen oli haastatteluissa myös keskeinen aihe. Asiakkaiden (lukijat, mainostajat ja muut yhteistyötahot) tarpeiden tunnistaminen ja huomioiminen on avainasemassa tulevaisuuden kannalta. Ihmiset eivät välttämättä enää tilaa sanomalehteä vain sen takia että se ilmestyy heidän kaupungissaan, koska uutisia voi seurata muutakin kautta. Toisaalta valeuutiskeskustelu (ja niin kutsuttu Trump-efekti laajemminkin) on aiheuttanut vastareaktion, jonka seurauksena Yhdysvaltojen keskeiset laatusanomalehdet ovat keränneet uusia tilauksia. Amerikkalaisten halu maksaa online-uutisista on selvästi kasvussa, erityisesti nuorten ja politiikan vasemmalla kentällä olevien kesken. Reuters Institute Digital News Reportin mukaan maksuvalmius on vuodessa noussut yhdeksästä prosentista 16 prosenttiin ja median tukeminen lahjoituksilla on kasvanut kolminkertaiseksi (Newman et al. 2017). Oman tutkimuksemme valossa kuitenkin näyttää siltä, että koko mediakenttä ei ole hyötynyt tästä Trump-efektistä.

Ennen mediatalot jaottelivat asiakkaita ryhmiin markkinointioppikirjojen mukaan, mutta jako oli varsin karkea ja yksinkertaistava. Nykypäivänä lähestymistavan pitää olla selvästi herkempi ja hienostuneempi, jotta asiakkaiden ymmärtäminen onnistuisi. Vaikka yleisö on noussut keskipisteeksi monessa toimituksessa, se nähdään siitä huolimatta helposti edelleen massana, eli klikkausten ja muun karkean käyttäjätiedon aggregaattina.

Sitouttaminen on yksi keskeisistä haastatteluissa esiin nousseista teemoista, kun pohditaan sanomalehtien liiketoimintamallin muutosta. Haastateltavat olivat yleisesti sitä mieltä, että sanomalehtien on aika uudelleen miettiä merkitystään yleisölle ja yhteisöilleen. Tämä liittyy vahvasti sekatavarakauppa-toimintamallin murrokseen: paikkakunnan sanomalehti ei ole enää itsestään selvä osa ihmisten arkea, vaan sen on perusteltava tärkeytensä lukijalle. Tähän on lehdillä eri keinoja, vaikkakin monet haastateltavista tunnustavat myös vaikeudet lukijoiden sitouttamisessa.

*San Diego Union-Tribunen* edustajan kommentti kuvaa hyvin nykytilannetta. Toimituksessa on aloitettu keskustelun yleisön kuuntelemisesta ja sitouttamisesta, mutta sen enempää ei ole vielä tapahtunut.

I think theoretically there are a lot of people predisposed to the idea [of engaging the audience]. I think in a practical sense it's going to be controversial. (...) I also think that a lot of times when we think that we're listening to our audience, we're really not. We're only hearing the things that confirm our presuppositions about what they want us to do, or what they're interested in. We're not really listening to have them help guide what we do in the future. I think that'll be different. (#U10/CM)

Median suhde yleisöön on pitkään ollut ongelmallinen. Toimittajat eivät välttämättä ole halunneet olla tekemisessä lukijoiden, katsojien ja kuuntelijoiden kanssa, vaikka muodollisesti ovatkin julistaneet edustavansa yleisön yhteistä kantaa ja tekevänsä työtä yleisen hyvän edestä. Silti uudenlaisen avoimen journalismin käytännöt luovat myös uudenlaista journalistista, yhteiskunnallista ja taloudellista arvoa journalismiin. Aiemmin sanomalehdet pystyivät usein nauttimaan de facto -monopolipositiostaan: mainostajien oli pakko käyttää sanomalehtiä mainoskanavanaan, eikä yleisö saanut kovin helposti tietoa julkisista asioista – politiikasta, päätöksenteosta tai julkisuuden henkilöiden käyttäytymisestä – muualta kuin perinteisestä mediasta.

Kuten jo aiemmin on todettu, sanomalehtiyritykset ovat yhä riippuvaisempia lukijatuotoista, kun perinteinen mediamainonta vähenee ja digitaaliset mainostulot eivät korvaa niitä. Uusille liiketoimintamalleille on olennaista, että ne rakentuvat suhteista useiden eri tahojen kanssa, myös yleisön. Yleisön sitouttamista tarvitaan, jotta ihmiset maksaisivat jatkuvasti mediasisällöistä. Sitoutumisen mittaaminen on muuttumassa klikkauksista mediasisältöjen parissa vietetyn ajan mittaamiseen, mikä merkitsee myös sitä että journalismissa pitkät jutut ja vahvat kerronnan tavat alkavat yleistyä.

Mainosrahoitteiset ja yleisörahoitteiset mediat tuottavat erityyppistä journalismia. Uudenlaiset startupit kuten *Quartz* tai *Voice of San Diego* ovat rakentaneet intohimon osaksi työprosessiaan. Intohimo on melkein tuntematon aihe journalismin ja mediatalouden tutkimuksessa, ja kun se on mainittu, sitä on pidetty poikkeuksena. Normatiivisen määritelmän mukaanhan toimittaja on puolueeton, neutraali ja objektiivinen (Harries & Wahl-Jorgensen, 2007).

*Quartzin* toimittajat saavat melko vapaasti valita, mistä haluavat raportoida, kunhan niin sanottu obsessio liittyy julkaisun aihepiiriin, talouteen (Küng, 2015). Uutis-startup *Voice of San Diego* on puolestaan sisäistänyt intohimon, ja toimituksen sisäisissä ohjeissa lukee: “Care about your beat more than anyone else. It is your way to make San Diego a better place to live” (Rosen, 2011). Tähän kuuluu myös yleisön kuunteleminen ja kuuleminen.

I also think that a lot of times when we think that we’re listening to our audience, we’re really not. We’re only hearing the things that confirm our presuppositions about what they want us to do, or what they’re interested in. We’re not really listening to have them help guide what we do in the future. I think that’ll be different. (#U10/CM)

Donald Trumpin valinta presidentiksi on haastateltavien mukaan lisännyt ihmisten kiinnostusta maksaa laadukkaasti tuotetuista uutisissäällöistä. Media-analyttikko kuitenkin kyseenalaistaa “Trump-efektin”:

I’m not optimistic about that, but I think the whole notion of branding trusted news is pretty simple. We just have a better case for it than we had before. And people are hungry for it. [...] So we know the *New York Times* example has been out there with hundreds of thousands of news to print. Places like *Slate* moved from 20,000 to 30,000 numbers almost overnight. Public radio memberships are going up. (#U1/MA)

Tämä näkemys saa tukea Pew Research Centerin (Barthel 2017) katsauksesta jonka mukaan lehlien, kuten *New York Timesin*, *The Wall Street Journalin* ja *Chicago Tribunen* digitilausten kasvun vastapainona on alan yleinen alamäki.

Perinteisesti yhdysvaltalaiset sanomalehtiyritykset ovat olleet pohjoismaisia verrokkeja riippuvaisempia mainostuotoista. Uusien tilaajien saaminen on iso haaste. Kyse ei ole vain tilaajahankinnasta vaan myös vahvan asiakassuhteen rakentamisesta. Tähän liittyy erityisiä ongelmia, sillä esimerkiksi sitoutumista ja vaikuttavuutta kuvaavat Chartbeatin ja Google Analyticsin mittarit on otettu mainostajien ja media-yhtiöiden käyttöön, mutta ne eivät kuvaa sitoutumisen ja sitouttamisen nyanseja (Hill & Steemers 2017). Tutkijat näkevät media-alan olevan esimerkiksi peliteollisuutta jäljessä kuluttajakäyttämisen ja -motivaation ymmärtämisessä.

Joka tapauksessa sanomalehtiä on jatkettava muuttumistaan ja saatava yleisö siirtymään maksaviksi (digi)asiakkaiden. Haasteena on, että sanomalehdet saattavat olla hyviä pitämään kiinni vanhoista asiakkaistaan, mutta eivät niin hyviä hankkimaan uusia.

In my view, the cost-per-click model is a giant weight dragging down CPMs<sup>6</sup> into the bottom basement. So that's a diagnosis of the problem. The solution in my view is about building a repeat habit of news. Another way of saying that is, I want sustained audience attention over time. Sustained audience attention, you can monetize in lots of ways, from subscription to different kinds of advertising. I'm not a huge fan of advertising broadly, I kind of think we're going to look back on the 20th century as this lunatic 100 years when we funded most media from advertising. That's going to seem crazy. (#U33/MCA)

Seuraavassa on muutama esimerkki siitä, mitä mediatilat ovat tehneet yleisön seuraamisen ja sitouttamisen suhteen. Yksi radikaaleimmista muutoksista tehtiin perinteisessä *Miami Herald* -lehdessä, joka on 114 vuotta vanha organisaatio. Lehti kuuluu McClatchy-ryhmälle ja siellä on perustettu "real-time"-toimitus, joka seuraa sitä, minkälaiset aiheet lukijoita kiinnostavat ja tuottaa uuttab sisältö sen mukaisesti. Asiantuntijat ovat kouluttaneet *Miami Heraldin* toimittajia käyttämään mittausvälineitä, lähinnä Chartbeatia, jotta he tietäisivät mitä kiinnostaa lukijoita. Sen lisäksi toimittajat ovat opetelleet hakukoneoptimointia, kirjoittamaan houkuttelevia otsikoita nettisivuille ja sosiaaliseen mediaan sekä jakamaan aineistoja verkossa.

We let everybody in the newsroom know what their traffic looked like in 2015 and it wasn't pretty in many cases. And we didn't put it out in the newsroom but we let people know, you're in the first quintile, you're in the second quintile, you're in the third quintile, you're in the bottom quintile. And the expectation is that you're gonna grow 10% and we're gonna help you do that because we're gonna teach you how to do social media, etc. (#U34/E-in-C)

Toinen toimituksen käyttämä sitouttamisen mittausmenetelmä on American Press Institutin kehittämä Metrics for News -ohjelma (<https://www.metricsfornews.com>). Toimitus voi itse räätälöidä ohjelman omiin tarpeisiinsa. Mittausten avulla huomattiin, että tietyt aiheet eivät kiinnosta lukijoita nettissä, esimerkiksi tanssi, baletti ja teatteri. Urheilutoimituksen kolumnisti puolestaan sai tehtäväkseen kirjoittaa tarinoita asioista, jotka hermostuttavat ja suuttavat paikallisia ihmisiä, palstalla nimeltä Miami Aggravations. Toimitukselle lähetetyn sisäisen viestin mukaan tarkoitus oli perustaa palsta, joka "tuo esiin näkökohtia eteläisen Floridan elämästä, jotka hämmentävät ja askarruttavat kaikkia, jotka elävät täällä" (Cooke 2017). Lopputuloksena näistä ja muista muutoksista oli, että *Miami Heraldin* nettiliikenne kasvoi 80 prosenttia vuonna 2016. Heinäkuussa sen nettisivut keräsivät jo 17 miljoonaa kävijää.

What I think was helpful was that we spent over a year and a half monitoring traffic, working with everybody, letting them know on a quarterly basis what's working, what's not working, your traffic isn't doing great, what can we do? (#U34/E-in-C)

## SOSIAALINEN MEDIA JA SÄHKÖPOSTIUUTISKIRJEET SITOUTTAMISEN VÄLINEENÄ

Median suhtautuminen Facebookiin on hyvin vaihtelevaa, suorastaan oikukasta. Facebookin perustaja Mark Zuckerberg ilmoitti keväällä 2017, että yhtiö on valmis kantamaan vastuunsa median tulevaisuudesta. Emily Bellin (2017) siteerauksen mukaan hän totesi:

A strong news industry is . . . critical to building an informed community. Giving people a voice is not enough without having people dedicated to uncovering new information and analyzing it. There is more we must do to support the news industry to make sure this vital social function is sustainable—from growing local news, to developing formats best suited to mobile devices, to improving the range of business models news organizations rely on. (Mark Zuckerberg, julkaisussa Bell 2017)

<sup>6</sup> Cost per thousand (CPM) tarkoittaa näyttökertakohtaista hintaa. Tämä on hinta, jonka verran maksaa tuhat näyttöä display-mainonnassa.

Facebookin oman ilmoituksen mukaan yhtiö haluaa auttaa mediayhtiöitä selviytymään. Osa sanomalehtiyhtiöistä käyttääkin Facebookin Instant Articles -palvelua, jotkut ovat kokeilleet sitä, mutta jättäneet sen sitten. Sosiaalinen media on toki tärkeä väylä tavoittaa lukijoita, jotka myös jakavat uutisia edelleen. Siitä kuitenkin nousee epäilyksiä, tuottavatko nämä kontaktit uusia tilauksia. Erään haastateltavan mukaan lehdet hakevat ensisijaisesti suoraa lukijakontaktia ilman välikäsiä.

*New York Times* just recently pulled out of Facebook, and now Guardian may have pulled out as well. I think the jury is still out on social media driving subscriptions there. I think what newspapers are doing are trying to have that direct relationship. I get an email every day from *The Washington Post* and *The New York Times*. I'm a subscriber, so maybe that's why I'm getting it. (#U21/RMA)

Tehokkaaksi sitouttajaksi onkin todettu sähköpostikirjeet. *The Washington Post* julkaisee yli 70:ää erilaista sähköpostitse toimitettavaa uutiskirjettä eri yleisösegmenteille, muun muassa politiikasta kiinnostuneille (*The Daily 202*) ja positiivisuutta hakeville (*The Optimist*). Tällä tavalla toimitus kouttaa ihmisiä lehden pariin säännöllisin välein ja sitouttaa heitä "ydinkäyttäjiksi" (core user).

This is the one thing that subscription products really have to pay attention to, is not just how many people are subscribing, but are they actually using it? Because if they're not, what's gonna happen is, when their subscription is up, they're going to decide, "I don't really need *The Wall Street Journal*." So, it's that. It's their active users. They not only read, they also independently search for stuff they want. They sign up for products like email newsletters. Right? Things like that. They're trying to personalize the product to what they want. That's another sign of a core user. Whether it's signing up for the email newsletters they want, or adjusting the flow, adjusting the news app on their phone, downloading the app, using the app. (#U28/MCA)

We do Facebook live, we do Facebook discussion groups. We have a really active Facebook discussion group for subscribers that are, you know, our toughest critics, but they're also ... Nothing gets by them and they have really thoughtful feedback. (...) The vast majority of what we do on social media is pushing our content. Right now we have one person dedicated to it, the deputy managing editor for audience engagement. After the reinvention we're going to have six, but, we're still ... We're again, we're a bit behind on all of this, yeah. (#U24/MCA)

Sähköpostikirjeiden systemaattinen käyttö vaikuttaa hyvältä keinolta lukijoiden sitouttamiseen.

I believe in email. I believe in local ownership. I believe in deep investment in the community, and I believe in basically entrepreneurial-inspired leadership. I think that's kind of what's required in the news industry. (#U33/MCA)

Digitally, I really believe in email. I think email's gigantically under-investigated and under-invested in. I don't know why you would have a mobile app, whereas when email ... The number one thing people do on their mobile devices is read and write email, and so I think of email as the most compelling mobile strategy you can have. The American news industry, by and large, has not built compelling email products. They don't think about them in any sophisticated way. I believe they should kind of be the foundation around which you'd build an entire digital revenue strategy and product strategy, but that's just not how the industry's thought of it, to date. That's why you have products like theSkimm, or Quartz, or Lenny Letter dramatically outperforming traditional news organizations, because those are entities that understand the power and importance of email. (#U33/MCA)

I implemented an email newsletter strategy, some of which still works, but over nine months I launched 24 email newsletters. Each had a specific audience, each had a specific author, each audience segment ... It was all built on market research, so for example, we designed an email product just for entertainment industry CEOs in the Los Angeles area, because we knew we could monetize that. We also knew what kind of news they wanted. (#U33/MCA)

## JÄSENYYSMALLI JA TAPAHTUMAT

Haastatteluista nousi voimallisesti esiin näkemys, että yhteisöllisyyden rakentaminen on yhä tärkeämpi osa tulevaisuuden sanomalehden konseptia. Nouseva trendi on tilauksen uudelleenpakointi eräänlaiseksi jäsenydeksi.

We become as much a source of news and information as we are a source of utility, and I think this is where newsrooms, we have to tap into that, not just the information part, the news and information, keeping up-to-date what's going on in the world and in the community, but I think we have an opportunity to be a utility, a really important utility for people in terms of how to make their lives better and easier to live. (#U17/CEO)

They call it membership. Sometimes it is, but mostly, it's not. Mostly it's tiered subscription. Where you pay a little more, and you get the product, and you get some additional things. Like access to the events. Or conversations with reporters and editors about things that you really care about. (...) Membership really is when people are not just paying for the product, that subscription, but they are joining the club. That's membership. And most news organizations don't actually have enough of a belief system that you would join that club. (#U28/MCA)

I think that the model going forward for a local news organization is going to be significantly smaller, significantly more of its resources focused on the civically important stuff, less sports coverage and so on, with either a non-profit model, or something that has a strong membership, community sort of revenue stream around events around premium products, around community. I think that's a really hard move for a newspaper to make. (#U11/MA)

Monet sanomalehtiyritykset ovat mukana tapahtumien järjestämisessä. Ne nähdään tärkeäksi väyläksi sitouttaa lukijoita ("engaged and committed readers"), myös kenties vaikeinta kohderyhmää eli nuoria lukijoita, milleniaaleja.

You gotta meet with them [readers]. And that's the other thing events do is they give you a chance to actually sit around and talk to the people who read you, which frankly leads to better journalism. You learn things, you get leaked information. The events thing is really the heart of what we do because it leads to ... It's sort of the starting for building a relationship with people that allows you to ... It takes the pressure off the ad model and also just guarantees you a committed audience. (#U15/CEO)

As I said, locally there are newspapers that own local sites. (...) It's like a membership thing. You pay X amount per month. You might get invitations to special events. You may get tickets because you're a member and getting that content. You'll know before anyone else knows of what's happening in the city. (#U21/RMA)

There's this line in there that comes up a lot that they [millenials] prefer experiences over possessions. They'd rather do stuff than buy stuff. We're trying to take advantage of that.

In addition to it being the right business model for us, it also fits in with what that generation wants. Which is they want to be given an opportunity to go do things. I think one of the smart things we've done is we've sort of divorced the events from news. A lot of people want to do events, like news organizations that want to do events always end up wanting them to be about news. Let's get news makers in to do a panel about school funding or something like that. (#U15/CEO)

Tapahtumien järjestämisessä etenkin isoilla mediayhtiöillä on puolellaan se etu, että niiden brändi on vetovoimainen myös yhteiskunnassa merkittävässä asemassa oleville ihmisille. Tästä syystä tapahtumat ovat hyvät tulonlähde.

Q: Is it creating sources of income or building the brand, or-  
A: I think it's both, it's both, but generally, those things make money, because people pay a lot of money to come meet the important people that you get to go to the conference, and it's easier to get important people to go to a conference if you're a media organization. (#U18/CM/)

Where the newspaper is a logical convener of these events, because how do you let everyone know that it's happening? You need to advertise in the newspaper, and so they are the newspaper, right? It makes sense, because they're actually a convening source for the community. It's clever because it's using this previous status of the newspaper as a way to drive a different source of income. (#U28/MCA)

A lot of people have done something along the line of events now where they try and produce events, anything from just public interviews in auditoriums where the editor or one of their famous journalists sits down and interviews somebody else who's an artist or a write or a newsmaker. They get a lot of people to come to that and they make money from sponsoring it and things like that.(...) The whole space of doing physical events in the community has been really promising for local papers. One, they can market them. They reach a lot of people and they can promote it and get you to come. They also just have this convening power because of that brand. This thing, it sounds like it's going to be a decent event and pretty reputable because it's run by this paper I've heard of. It's not some random and it could be a little sketchy. Events have been a big thing. It's a pretty good revenue line. It's also I think beneficial because you can do them on the cheap if you're in that situation where you don't have a lot of money to invest in it. (#U27/RMA)

Pienistä julkaisuista *Voice of San Diegolla* on tapana järjestää tapahtumia esimerkiksi paikallisessa ravintolassa. Tapahtumia järjestetään eri teemoista ja niissä käsitellään paikallisia ongelmia, joista ihmiset ovat kiinnostuneet. Tapahtumat voivat olla tärkeitä myös suhteessa mainostajiin:

20 years ago you basically took orders from advertising. Everybody came to you, right? I think we just try to be creative and find ways to engage, not only the reader, but the advertisers. The advertisers might be through events, for example. (#U21/RMA)

Näiden esimerkkien perusteella näyttää siltä, että yhteisöllisyyden luominen jäsenyys- tai tapahtuma-mallin avulla voi auttaa julkaisuja erilaistumaan ja olemaan uudella tavalla tarpeellisia ja merkityksellisiä lukijoille, kuin aiemmin vallalla olleen yleislehtien sekatarvekauppa-mallin mukaisesti toimiessaan.



ROBERT PICARD

# PARADIGM CHANGE IN BUSINESS MODEL THINKING

Newspaper publishers and newspaper associations have argued for new business models to find new revenue for the past decade, but this argument is narrowly focused on their needs and does not reflect the broader thinking about business models that demonstrates a focus on value, services, and relationships.

The basic newspaper business model is clearly no longer working as effectively as it used to because it is based on creating mass audiences by keeping content prices low and then selling the audiences to advertisers who wished to reach them. That model was facilitated by publishers enjoying near monopolies on production and distribution in specific geographic areas, which limited competition for both audiences and advertising.

Changes in technology, competition, and the business of media have made that business model based on creating revenue streams through audiences and advertisers obsolete. Today, business model innovation is more focused on building and nurturing value-creating relationships with readers, advertisers, partners, and intermediaries. When those relationships are effective, they become the bases for revenue-producing activities.

Relationships involve connections and bonding with others. They are based in feeling affinity and attachment, not merely exchange and consumption. Relationships based on transactions and functional usefulness produce relatively low-level connections and do not create much value for the consumer or the company. Building higher-level relationships requires mutual respect and pursuit of joint benefit. Higher-level relationships evoke emotions, senses of belonging, and involvement. There are many ways to measure the strength of relationships. At the low level, they tend to be assessed through engagement measures such as clicks, time spent, commenting, etc. Higher-level relationships tend to be indicated by factors such as membership, participation in events, providing suggestions and advice, and co-creating content.

Establishing productive relationships is easier said than done. It is not enough for the company to want a relationship; they must persuade consumers and others that there is benefit for them in the relationship. Relationships cannot just be a way for the company to market to targeted consumers; they must deliver value for consumers as well.

The first step in establishing or seeking to improve relationships is to determine what kind of relationship is desired. The relationship(s) selected will differ for customers, suppliers, partners, intermediaries, and others. These may include transactional relationships, service relationships, product development relationships, co-creation relationships, and philanthropic relationships (grants, crowdfunding, etc.). It is important to be able to describe the relationships, what is wanted out of them, and how they will be pursued.

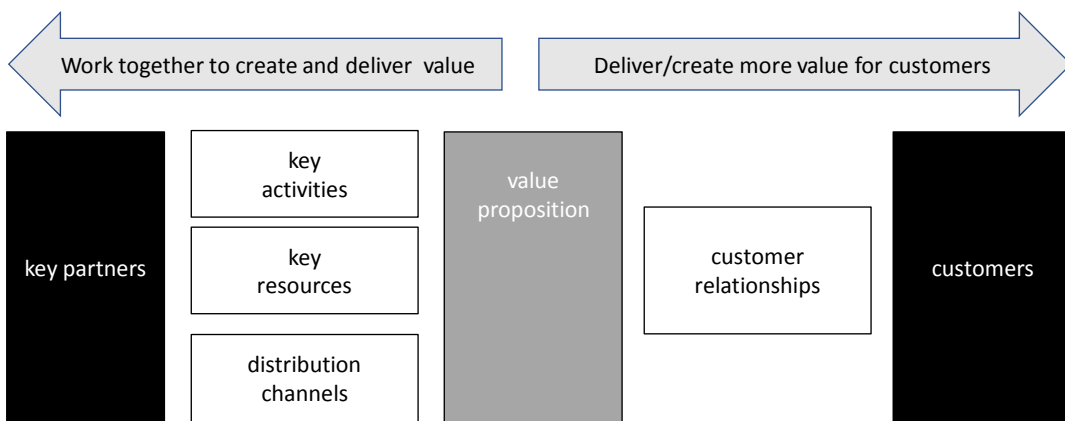
Although many news enterprises are attempting to develop innovative business models, innovation is a problematic concept because it involves products, technologies, and processes. Some innovation benefits consumers; some the company. Much of what is called innovation is not innovation, but adaptation. Changing to adopt new possibilities and pursue new opportunities is important but does not represent innovation. Firms are not innovative because they decide to use social networks to increase contact with readers and potential readers or because they optimize their content for mobile use. Innovation involves creating new processes, products, ways of presenting content, and changing the relationships between users and the news organization.

The contemporary business model perspective for all enterprises focuses on such elements, not only the revenue streams of companies, and it is crucial for newspaper-based firms to embrace this larger perspective. Business models explain the business logic of specific enterprises and the products, services, and relationships upon which the business and activities are based. They identify the consumer needs to be met, provide insight into where and how value is created, reveal how its value constellations will operate, identify dependencies and interdependences, and explain how the company and its offerings differ from competitors.

In doing so, business models show how they will overcome the most common reasons for failure: lack of market need, poor products and services, lack of attention to customers, inability to organize business relationships effectively, and more effective competitors.

Contemporary business model thinking is illustrated in the following figure.

**Figure 13. Contemporary business model thinking.**



The company’s value proposition, the value it provides customers, is central, and the enterprise works together with key partners to add value to the product or service. This is delivered to the customer where relationships are established and opportunities to create more value are created.

News providers rethinking their business models and adapting them for the digital world must evaluate their current models honestly, identify what must change, and alter their business models, products, and processes to accomplish those changes.

**CHALLENGES AND OPPORTUNITIES OF PAPERS VARY SIGNIFICANTLY**

Although all segments of the news industry are being affected by contemporary changes in technology, competition, and consumer choice, the extent and rate of change vary significantly. The pace of change varies nationally depending upon broadband penetration, smartphone use, and a variety of social factors, and the opportunities and resources available. Even within nations, national newspapers, regional newspapers, and local newspapers encounter differing challenges and opportunities.

It is important for firms to alter their business models in ways that are appropriate for their markets and customers, not merely to copy what others are doing.

This report on developments in the U.S. newspaper industry reveals the wide differences in situations faced by individual publishers. Those who want to learn lessons from the U.S. industry need to determine which approaches are most appropriate for them specifically.

National newspapers, for example, tend to be strongly branded, have large audiences, focus on national and international news, and generate significant subscription and advertising revenue that gives them resources not available to smaller news providers. In the digital space, they often compete directly with an array of digital-only players and other international digital competitors. In the U.S., *The Wash-*

ington Post and New York Times thus must compete and distinguish themselves from the digital news activities of *The Guardian*, *Huffington Post*, *Vox*, and *Buzzfeed*, for example.

Regional or metropolitan papers generally cover a wide geographic area such as a metropolitan area plus a group of suburbs or nearby towns. They have historically survived on a mix of local and national advertising and subscriptions. Regional players often have difficulty in digital markets because they have difficulty generating large numbers of users by comparison to national papers and because local advertisers and agencies often are not as adept or involved in digital advertising as national counterparts. Although all newspapers are struggling with the changing fortunes of the industry, regional/metropolitan papers are squeezed between the advantages held by national and local news providers. Newspaper organizations such as the *Los Angeles Times* and *Chicago Tribune* are finding it difficult to compete with national news providers and have difficulty covering neighborhoods and suburbs, and smaller cities in the regions they serve.

Local papers have a very strong focus on and bonds to a single community, with most subscription and advertising coming from within that market. They are closely aligned with local interests and tend to generate strong community engagement. They benefit from their tendency to have higher household penetration because of fewer local sources for news, information, and advertising. Local publications face challenges in the digital space, however, because their audiences are individually small and the papers lack resources to acquire technologies, knowledge and personnel on their own. This increases the need to cooperate, either through collaboration with other publishers or group ownership. In the U.S., for example, the Local Media Consortium is working to promote collaboration and improve relations and partnerships with Facebook and Google. Companies such as GateHouse Media operate digital infrastructures and provide joint digital services that small papers across the U.S. could not undertake alone.

## **DIGITAL PRODUCTS' CHARACTERISTICS, STRATEGIES, MODELS, AND OPERATIONS DIFFER FROM PRINT**

Digital products are not merely extending the distribution of print news content, but require companies to understand that their nature and consumption differ significantly. This means that digital products face entirely different issues that require different strategies, content and presentation, business models, and operating structures.

News providers that approach digital products without more sophisticated perspectives will be disappointed in the results because their products will not effectively serve audiences, advertisers or the publisher. The challenge for most news organizations is that they are so busy with the operational aspects of digital products that they have little time for deep strategic thinking, especially in smaller news providers without personnel specifically assigned to strategy and business development.

In many enterprises, digital operations and new revenue initiatives are being pursued without creating comprehensive strategies, fully considering their requirements, establishing new business models, or providing adequate and appropriate resources.

## **NEW MODELS REQUIRE DIFFERENT BUSINESS KNOWLEDGE AND ABILITIES**

Contemporary news business models and activities require knowledge and skills sets absent in traditional news staffs. These include digital content production, web design, digital marketing and sales, social media content coordination, digital account management, and web analytics analysis, as well as relationship management and engagement facilitation for readers, advertisers, and other customers.

Expanding a business model to include new activities and revenue through content syndication, specialized newsletters, event production and management, branded merchandise, creative services, web hosting and SEO, and package delivery also require the business to acquire personnel with skills and abilities not present in most news providers today. They require an entrepreneurial attitude and the creation of individual business models and value-creating strategies for each activity.

Such challenges have led the Dallas Morning News to expand activities by taking them outside the newspaper structure and starting separate new companies, including an event marketing company

(CrowdSource), a digital marketing company (508 Digital), and a content marketing agency (Speak-easy). GateHouse Media followed a similar path in creating its digital marketing services company Propel Business Services. Of course, these strategies require companies to make investments to support growth.

Establishing a new business model or models is not as simple as deciding to change the model. It requires a new strategy and resources that make the strategy feasible. New business models, products, and services also require a change in organizational thinking to become more entrepreneurial and willing to absorb failure and accept outcomes different from what has been anticipated. Understanding general business trends is important because for every 4 consumer products in development, only 1 makes it to market. Once launched, 2 out of 3 consumer products fail. *Dallas Morning News*, for example, has found success with its event marketing and content marketing companies, but not with its digital marketing company.

This is a huge challenge for most news providers because they have not needed to take risks for generations. Today, as legacy news products decline, not taking risk is dangerous in itself because it leads to lost opportunities and inability to grow and develop in new ways, forcing the firm to live on existing, declining activities.

## **THE IMPORTANCE OF SERVICE LOGIC IS INCREASING**

Service logic is becoming more central to the news business as firms serve customers across platforms and have multiple contacts with them throughout the day. Service logic differs from goods logic, the production-oriented, company-centric logic that has been the driving logic of news provision for more than two centuries. Service logic is based on helping customers solve problems or improve their lives, aligning service with individual customers and not merely clusters of consumers. This is accomplished by establishing and maintaining individual relationships, anticipating and solving each customer's needs, saving them time and effort, providing convenience, creating simplicity and ease of use, and focusing on interactions with them. Service quality and customer satisfaction are central in service logic.

The *Los Angeles Times* uses service logic to create specialized newsletters to provide focused, compelling information for specialist groups of people in the entertainment industry and real estate industry, and even amusement park enthusiasts.

Embarcadero Media, which operates a group of smaller local publications out of the San Francisco Bay area, uses its Express email news digest to drive readers to digital products by targeting readers to remind them to come to their sites for more news and information.

The *Coronado Eagle and Journal*, a hyperlocal weekly on Coronado Island in San Diego, believes that its key to success is the daily interactions with people who live and work on the island that gives them great insight into the lives, interests, and needs of the audience. It perceives and relates with community groups and clubs as partners in creating content and serving the needs of readers for information on local activities.

Business models that do not start with effective value propositions on how they will serve customer needs will not succeed over time.

## **THOSE MANAGING DIGITAL PRODUCTS REQUIRE DIFFERENT TRAINING, KNOWLEDGE, AND BACKGROUND FROM THOSE MANAGING PRINT PRODUCTS**

Digital news operations require broader commercial competence than newspaper advertising sales and business operations. Pursuing new revenue streams such as content marketing, branded merchandise, event production and marketing, marketing services for local businesses, and web hosting and other digital services for businesses and organizations require specialized professional knowledge, skills, and traits that differ from those typically found in the advertising and administrative operations of newspaper firms. To be successful in these operations requires a strong entrepreneurial orientation, competitive drive, and service mentality.

Getting the right people in place takes commitment and time. The *Boston Globe*, which has struggled with its digital strategy, is increasingly bringing in digital managers and advertising personnel from technology companies and platforms such as Google and Yahoo! to address its deficiencies. These new types of personnel bring technological expertise and digital market understanding that it is using to improve its digital activities and business operations.

## ORGANIZATIONAL ARRANGEMENTS FOR DIGITAL ARE STILL EVOLVING

Despite a great deal of organization change since the millennium, the organizational arrangements necessary to fully exploit digital operations and succeed in the digital space are not yet fully in place in most news providers. New types of structures and working arrangements are needed in newsrooms and more interaction with those engaged in relationship management and digital customer management is required. Differences in print and digital advertising can also create difficulties. Most publishers are still struggling to adapt to the digital age.

The challenges of organization are not simple. *The Washington Post* in print, for example, is primarily a regional product, but its digital product has national and, increasingly, international reach. This creates news selection differences that must be addressed in the newsroom organization. Advertising operations are problematic because it is difficult for the same representatives to sell both print and digital advertising because print and digital have different customers and deal with different advertising buyers.

There is no single correct organizational arrangement to deal with the increasing number of products and varying business models in news organizations today. However, digital production requires a degree of both integration with and independence from print production.

Philadelphia Media Network has created an integrated newsroom providing content for *The Inquirer*, *The Daily News*, and Philly.com. This arrangement is workable for the firm financially, but executives admit that the arrangement has created challenges that are still being addressed in maintaining different voices and brands for the 3 outlets.

The *Boston Globe* is addressing challenges in its multiproduct operations by establishing product managers for different print and digital products. These act as mini-publishers with responsibility and accountability for their activities and performance. The *Deseret News*, however, has spun off its digital operations to give them more entrepreneurial space and allow greater flexibility in their activities.

## TECHNOLOGIES, METRICS, AND ALGORITHMS ARE TOOLS NOT THE GOAL

Operating in the digital environment is forcing companies to make significant investments in technology, software, and systems and the personnel to manage and operate them. News organizations such as the *New York Times*, *The Washington Post*, *The Wall Street Journal*, and *The Guardian*, which have led these developments, perceive those investments as central to their strategies and future growth. Many smaller organizations seem to think that they must follow without developing their own business models and strategy or without regard to whether they will be equally useful. The tool of technology is the goal rather than the means to a goal.

Publishers are increasingly using the data obtained from digital and mobile interactions to understand users and their consumption patterns. It is important, however, to remember that improving relationships and the value delivered to customers is the goal of the activity, not the merely gathering and analyzing of data. The data provides evidence about relationships and how they can better be nurtured. Data can help publisher better serve customers, so great thought must be put into how to use the data strategically. The need to make sense of the data and use it effectively led the *Deseret News* in Salt Lake City to create a team of data scientists in its Deseret Digital Media subsidiary to mine the data and determine how the company can better serve customers, particularly through advertising targeting.

Although available data is improving, publishers need to understand that the types of data most generated are designed to assist advertisers and marketers, not to help make content decisions. It is important, then, to understand its limits in serving reader/user needs and delivering them greater value.

When content is accessed through third parties such as Facebook or Twitter, getting useful data is difficult because it is in the interest of their own business models to keep much of that data inhouse for their own use. This makes it difficult for publishers to determine how their readers move across the news providers' services and other widely available platforms.

Digital data alone is insufficient to understand reader relationships. It needs to be used in conjunction with other types of reader/user research provided by their feedback and customer service comments, focus groups, surveys, and other consumer research methods.

Algorithms and robotic tools are increasingly being used in newsrooms to determine what content gets provided to the customer and to produce content, especially standardized and highly formulaic stories about upcoming community events, finance, and sports. These tools cannot effectively create value and serve needs unless they are carefully constructed and driven by strategy and value-creation perspectives because they increase the commoditization of news.

## **NEW MODELS FROM SMALLER MEDIA AND START-UPS**

Smaller news providers and digital start-ups tend to evidence higher entrepreneurial attitudes and more flexibility in their business models. They tend to have a wider range of revenue sources than larger firms—perhaps out of necessity.

In dealing with advertising consumers, smaller local news firms tend to focus on local firms for advertising both in print and digital products, with the latter often being treated as an add-on. Interestingly, some local digital start-ups are now starting weekly or monthly print editions because many local advertisers still want to be available in print.

In dealing with readers/users, smaller news providers tend to have better relationships than larger enterprises because successful local operations are usually tightly knit with their communities through everyday contacts in the community and support of local activities and events. Smaller enterprises are more likely to seek supporting memberships and offer member events that produce higher engagement with audiences. They also are the primary news organizations seeking financial support from community foundations and facilities and other contributions for educational institutions.

## **IMPLICATIONS**

The changing consumption of news providers' products, shifting revenue streams, and broader approach to business models requires news providers to think more strategically about their firms and relationships with multiple customer groups and to implement changes to better link with customers.

This review of the U.S. newspaper business reveals that it is struggling with business models and still trying to find its way in the digital environment. Publishers from other countries should not look to the U.S. to provide answers to their challenges, but can use it to help clarify their strategies and attempt to avoid many of the difficulties in the U.S. approaches.

Many U.S. newspapers remain focused on pursuing an advertising-based business model dependent upon large audiences both in print and digital operations. Although it is important to maintain advertising as a source of revenue, its significance is declining; in many print operations subscriptions already provide most of the revenue. Because only a few leading digital operations generate sufficiently large audiences to rely on digital advertising, most news providers need to pursue revenue growth through subscription income. Mid-sized and smaller operations are being forced to pursue a mix of revenue streams with reliance on subscribers for the base of revenue.

The shift away from the traditional newspaper business model requires greater focus on readers/users. Few U.S. news providers focus on improving relationships with readers and their current relationships tend to be transactional and very poor. Many firms are more focused on improving relationships with key players in digital space, but this mainly involves working with platforms and digital advertisers to improve targeting, advertising performance, and advertising revenue.

Only limited attention and effort has been placed on rethinking the news and information provided, new forms of storytelling and information presentation, and improving the reader/user experience in the U.S. Even when readers/users are focused on, more effort appears to be placed on obtaining new read-

ers rather than increasing satisfaction of and improving relationships with core readers that can be used to pursue greater revenue from them. Digital media provide opportunities for nurturing and solidifying relationships with all customers, including core consumers who still prefer the print product but use digital opportunities for specific news/information acquisition and interaction throughout the day. Companies need to develop more than mere exchange relationships using the digital capabilities with both core print users and digital-only users.

The U.S. experience demonstrates the unwillingness or inability of many established newspaper firms to consider value creation and business relationships in the broader way that digital competitors and emerging news providers are embracing. The need to embrace those perspectives and alter operations grows stronger every day and publishers seeking lessons from the U.S. publishers should try to avoid their damaging conservatism and surmount the hurdles that U.S. publishers are having difficulty overcoming.

BOZENA MIERZEJEWSKA AND AXEL RÖPNACK

# DIGITAL STORYTELLING AT THE NEW YORK TIMES

The closure of newspaper businesses has become so common that it has started to be considered a “sign of the times”: times in which traditional journalistic stories, typically with minimal added context and without innovative visuals, are so undifferentiated from those of competitors that they start to be treated as commodities. Besides innovation in novel forms of distribution or closer relationships with advertisers, newspapers are experimenting with employing a richer, more digital mix of journalistic forms that aims to deliver more interesting and engaging narratives. The term “Digital storytelling” (DST) has become a synonym for the art of telling stories using digital media.

This report illustrates how the highly-respected newspaper organization *The New York Times* has embarked on projects related to digital storytelling. This big news organization has been the subject of a number of publications showcasing its innovative approach to paywalls, digital subscriptions<sup>7</sup>, content production processes when transitioning to digital format<sup>8</sup>, and general processes of innovation<sup>9</sup>. Not surprisingly, *The New York Times*, an organization with 1,300 journalists, has embarked on projects related to the innovation in content. The realization that the development of audio, video and virtual reality technology is an opportunity to deliver value to their readers prompted its management to invest considerable resources in creative production processes. This fact, along with the prominence of the title, makes it very fitting to have a closer look at this organization in the context of digital storytelling. *The New York Times* has developed a reputation for excellence in journalism, and established itself as a leader in creating rich and engaging journalism.

The material provided in this report has been compiled from conversations with insider informants at *the New York Times* and supplemented with internal reports as well as publicly-available research materials. Our confidentiality arrangement does not allow us to provide direct quotes.

## NEW YORK TIMES - “THE GRAY LADY” CREATING JOURNALISM WORTH PAYING FOR

With easy access to free news content on many online platforms, it is becoming more difficult to convince readers to pay for high-quality content. Content created in forms that were originally developed for printed newspapers or for desktop computers will no longer convince readers to make a financial commitment. Matching the evolving habits, needs and desires of readers, the management of “The Gray Lady” has focused on differentiating itself in the market and delivering content that is worthy of consumers’ time and subscriptions. New journalistic forms to increase engagement are the priority in journalistic innovation. Interactive graphics, virtual reality and Emmy-winning videos are the key to attracting loyal readers and advertisers.

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7 Kumar, Vineet, Bharat Anand, Sunil Gupta, and Felix Oberholzer-Gee. “The New York Times Paywall.” Harvard Business School Case 512-077, February 2012. (Revised January 2013.)

8 Usher, N. (2014). *Making News at The New York Times*. University of Michigan Press.

9 King, L. (2015). *Innovators in digital news*. IB Tauris.



## VIRTUAL REALITY - BECOMING A PART OF THE STORY

Virtual reality (VR) is a three-dimensional simulation of an image that a viewer can interact with using a variety of tools, including headsets that attach to one's mobile phone. VR can also be defined as a hardware-driven concept referring to an immersive visual experience created by goggles and other sensory equipment intended to make the user feel immersed in the experience.<sup>10</sup>

Premiering in 2015, *The New York Times'* use of VR in storytelling involves developing content to depict live-action and current events. The readers can fully immerse themselves in a number of once-in-a-lifetime events and otherwise unreachable destinations with 360-degree virtual reality videos. Readers can access these videos on the NYT website under the 360 video section and the NYT VR app through VR headsets and other mobile devices. The Daily 360 videos last only about one to three minutes and feature voiceovers and closed captions, delivering additional context and explanations on a particular story. Additional VR featured videos on the NYT VR app can last anywhere from five to twenty minutes and delve more deeply into stories and situations.

As of September 2017, The Daily 360 department at *The New York Times* consists of not only the video and audio editors of the VR videos, but also the many NYT journalists, editors, photographers, and video journalists who leave these cameras in remote locations around the world in order to capture a unique films<sup>11</sup>.

The Daily 360 is recorded with Samsung Gear 360 cameras that reporters leave on site to document an event and then later retrieve. Samsung Gear 360 cameras have a 360-degree dual lens that enables them to capture every angle of an event. These cameras are very accessible and easy to use and are therefore the perfect devices for NYT journalists hoping to capture the perfect moment. *The New York Times* released its first VR video on November 5, 2015, which tells the story of three refugee children from South Sudan, Syria, and Ukraine ("The Displaced," 2015)<sup>12</sup>. With the release of this video, the paper debuted *The New York Times* Virtual Reality (NYT VR) application and gifted thousands of subscribers Google Cardboard headsets in order to give them the full virtual reality experience<sup>13</sup>. This gave audiences the opportunity to look into the eyes of children impacted by the aftereffects of war on their countries. Following the release of this video, *The New York Times* continued to release VR videos approximately once a month until the end of 2016. In November 2016, *The New York Times* began their "Daily360" initiative as "almost a dare" to release one VR video per day<sup>14</sup>.

The use of VR videos to tell journalistic stories is unprecedented. It offers audiences the chance to become almost a part of the story by fully immersing themselves in a specific location or situation. Those viewing *The New York Times* VR videos can go to a bombing site in Yemen, or experience warfare in Fallujah, Iraq, from the comfort of their home. Audiences have never before had such ready access to such sophisticated technology. VR is not yet utilized by all news-reporting platforms; therefore, *The New York Times* has pioneered the use of VR in terms of storytelling. To share videos with a larger audience, The Daily 360 is posted on a YouTube channel which has 983,000 subscribers and almost 300 posted VR videos (15 Sept, 2017). With the Daily 360 initiative, *The New York Times* has released videos that range in content from climate change to a tour of DJ Khaled's (an American rapper and music producer) garden. This daily video feature has driven *The New York Times* to create videos with a variety of content to attract a broad range of viewers.

Daily 360 Virtual Reality videos that capture unique and inaccessible locations have captured a lot of attention from audiences. These locations range from the Middle East and the deep sea to exclusive looks at performance arts pieces and behind the scenes of a presidential campaign. It also works well in

10 Robbins, Sarah (2009), Defining Virtual Worlds - Using a Definition as a Platform for Communications Research, *Rocky Mountain Communication Review*, Vol. 6 (1), pp. 8-13

11 Leadership of the Daily 360 is comprised of Sam Dolnick, Associate Editor, Marcelle Hopkins, Executive Producer of Daily 360 News, and Lisa Tougin, the Executive Producer of audio.

12 <http://with.in/watch/the-displaced/>

13 <http://www.theverge.com/2016/4/28/11504932/new-york-times-vr-google-cardboard-seeking-plutos-frigid-heart>

14 Marcelle Hopkins quoted in "The Future of News" 2016: <http://www.nytimes.com/2016/12/01/insider/the-future-of-news-virtual-reality-the-daily-360-podcasts-and-more.html>

instances of intimacy, such as meeting a new person. This visual experience becomes much more real and effective than reading about someone's everyday life. One example is "the The Displaced" VR video, which follows the lives of refugee children. Furthermore, 360 VR videos add most to storytelling when the setting of a story acts as a character within the story. The videos that feature a bombing site or space give audiences further insight into the whole story, thus, improving their understanding and interest<sup>15</sup>.

... in 90-95% of the time [normal] video can probably do it better but there are those instances where VR/360video actually add something... where the place is really important, where place is nearly a character and if we can take people to this place through VR ... it is really good at intimacy so if you meet someone in VR/video360 it offers a kind different feeling than reading about the person... its is also really good for access of places that are hard to reach or are unavailable to the public... stories like behind the scenes of a campaign trail...

Marcelle Hopkins, Executive producer NYT 360 news & Co-Director of Virtual Reality

An inevitable risk of bringing such advanced technologically product comes from technical problems. The NYT VR application has received some negative feedback from audiences due to problems with the app. Many users complain on the app store reviews about trouble calibrating, loading, and viewing the whole 360 span on video.

Additionally, some audience members believe that these videos act as distractions from a story's true content. With various updates, NYT VR has tried to solve some of these issues. However, the NYT cannot always solve issues based on connection and wifi access.

Also, virtual reality is a specific communicative medium. *The New York Times* has realized that 360 videos have deficiencies, such as lack of context and communication. These videos cannot be used to capture every story because different media have different benefits. For example, tweets on Twitter are used for shorter headlines and messages, while Snapchat's graphic features are utilized for more interactive stories, and a feature-length video allows for context and eloquence that the other media cannot provide.

In order to be able to view stories created with VR technology, users need to be equipped with a hardware device to attach it to their smartphone or VR headset. When Daily 360 was introduced, in November 2015 and in April 2016 print subscribers received a complementary Google Cardboard headset. A total of 1,3 million headsets were distributed free of charge. The cost of the headsets was covered by a partnership with Google, while investment in equipment to produce VR content was covered by a partnership with Samsung that provided cameras, other peripheral devices and training for free.

Apart from the free distribution of headsets at the start of the project, devices to view the content need to be purchased by users, in prices varying from \$10 for the Google Cardboard to \$499 for an advanced headset by Oculus.

Many brands that started developing branded content in VR have been distributing free Google Cardboards as a promotional measure to encourage viewing and enable easy access to the content they create. There is no direct revenue from VR devices, and monetization of the content has still not been resolved. So far it is an experiment to accustom audiences to the new format of storytelling. Branded content produced for VR devices is assumed to generate revenues, since the in-house branded content studios charge clients for producing it.

<sup>15</sup> Other notable examples: "*Bodies Bending Sound in the Guggenheim*" by Kaitlyn Mullin, Maureen Towey, and Tim Chaffee (<http://www.nytimes.com/video/arts/100000004903994/dorrance-dance-guggenheim.html?mcubz=3>) features a performance dance piece at the Guggenheim museum on Manhattan's Upper East Side. This video demonstrates virtual reality's ability to immerse audiences in a story. Especially with dance and performance pieces, virtual reality and 360 videos give audiences a never before seen angle and sense of immersion unparalleled in real life. "*The Winning View from Chicago*" by Ben Kolak, Niko Koppel, and Kaitlyn Mullin (<http://www.nytimes.com/video/sports/baseball/100000004741874/the-winning-view-from-chicago.html>) brings audiences to Wrigley Field in Chicago, Illinois following the Chicago Cubs baseball team's first World Series win in over a century. Audiences are literally immersed in a group of baseball fans overjoyed and screaming in victory. This video brings audience members right into the action of a historic event.

Product	Price	Device	Hardware / Operating System
Google Cardboard	\$ 10	Mobile	Smartphone* / Android
Google Daydream	\$ 70	Mobile	Smartphone* / Android
Gear VR	\$ 149	Mobile	Android
Oculus Rift & Touch	\$ 499	Fixed	PC / Windows

**Table 2. Overview of VR hardware currently available in the US.**

\* Compatible smartphones: Pixel (Google), Galaxy S8 / S8+ (Samsung), ZenFone AR (Asus), Mozo Z (Motorola), Mate 9 Pro (Huawei), Axon 7 (ZTE)

## AUGMENTED REALITY - TELLING BRANDED STORIES

Augmented Reality (AR) is the technological cousin of VR. AR gives the reader the ability to overlay the physical environment with virtual elements such as information or images, which can interact with the physical environment in real time<sup>16</sup>.

*The New York Times* was relatively late in starting to use AR in creating content. Rather than developing stories that are comparable with 360 VR, it focused on using AR in native advertising and branded content. In 2014 NYT launched its all in-house branding studio (the T Brand studio), which focused on providing services to advertisers and brand partners of the newspaper. T Brand studio opened as a start-up operating on the margins of the main organization, with the goal of experimenting and building technical expertise. In 2016, T Brand acquired two small companies, innovators in marketing and branding: HelloSociety (catalogue of social influencers) and FakeLove (know-how of AR) and has grown to over 100 employees as of February 2017. By partnering with clients like IBM or Kia, T Brand develops content that immerses users in educational and promotional activities, a bit like a digital scavenger hunt. For example, Outthink Hidden, developed in collaboration with IBM and inspired by the film *Hidden Figures*, takes users on a scavenger hunt to different locations across the USA.

Activities involving AR in NYT are still at the early stage of development, since it is very costly to develop and produce AR. Some of the challenges mentioned in relation to AR storytelling are “not enough affordable hardware in the consumer marketplace” and not enough content in circulation.

T Brand studio operates separately from the editorial room; hence journalists are not involved in the activities of this arm of NYT operations. The plan is to never blur the lines between partner-created content and editorial content.

<sup>16</sup> Javornik, Ana (2016), Augmented reality: Research agenda for studying the impact of its media characteristics on consumer behaviour, *Journal of Retailing and Consumer Services* 30 (2016), p. 252–261

Software	Examples	Functionality
Layar	Metro Vancouver (Canada), Burnaby Now (Australia)	Adding links, pictures, QR codes, and videos to any real-world object; enabling readers to purchase items related to the newspaper
Aurasma	Tokyo Shimbun (Japan)	Enriching images with overlaying animations and music; translating articles for kids with animated cartoon characters, color, pop-up headlines
Arc Stories	Washington Post (USA)	Supplementing a story of a crime case with a walk-through with 3D imagery, audio, maps and text based on court documents <sup>1</sup>

**Table 3. Overview of AR tools used by news organizations.**

<sup>1</sup> <http://www.washingtonpost.com/pr/wp/2016/05/10/the-washington-post-releases-augmented-reality-view-of-freddie-grays-case/>

## DATA VISUALIZATION - ENHANCING TEXT WITH VISUALLY DESIGNED CONTEXT

Data visualization tools showcase where the most of the creative storytelling takes place. They simplify things that a regular reader may have trouble digesting. There are also ways for readers to interact with data presented along with a story, which provides more detail for the reader. Also, readers have the ability to compare data given at different points of the article.

2017 marks the 10-year anniversary of the *New York Times* Interactive News Team, embedded within the newsroom. It builds newsroom-facing tools and reader-facing projects that expand the horizons of digital news reporting. The interactive news team is divided into three sub-groups: newsgathering through technology, constructing open-source libraries, and admin for entering and cleaning data.

The Interactive News Team is where the programmers and reporters work together and where the technology, tools and techniques are most developed. *The New York Times* uses a plethora of tools, standard software packages and in-house developed tools. Rather than focusing on the tools, we illustrate here the use of visualization in storytelling by showcasing major techniques employed by the Interactive News Team.

Technique	Description & examples
Labelling	Providing a clearer display of information that allows easier reading. Examples: <i>'The Yield Curve'</i> <sup>2</sup> , a 3-D view of a chart that predicts the economic future; and <i>'342,000 Swings Later, Derek Jeter Calls It a Career'</i> <sup>3</sup> , in which various groups of elements in the visualization are labeled.
Tooltips	Providing additional details to the reader when he or she mouses over an element of the visualization. Examples: <i>'In Gaza, a Pattern of Conflict'</i> <sup>4</sup> , when the reader moves their mouse over the amount of cumulative deaths, the numbers increase or decrease depending on which way his or her mouse goes.
Linking	Providing useful ways to make readers understand the information better. This can be achieved by different types of links: linking elements through interaction, through color or through animation. Example: <i>'4th Down: When to Go for it and Why'</i> <sup>5</sup> shows filtering custom-built word clouds based on attributes described in the text.
Steppers	Providing information to the reader on how much of the story is left. The user clicks from step to step to see the story develop. It also makes it easier for a reader to pick up where they left off if they decide to stop reading the article at a certain point. Example: <i>'The Yield Curve'</i> <sup>6</sup> lets the user click through the different points in the story. It also changes the graphs represented as the reader clicks through. It is a creative way to view data and give the reader more control.
Scrollytelling	Allows a reader to scroll down a page and read the content of the article accompanied with images and videos. As the reader scrolls down the page, the story unfolds. Scrolling also triggers changes in the way information is presented. Examples: <i>'How the US and OPEC Drive Oil Prices'</i> <sup>7</sup> has graphs that change as a reader scrolls down; and in <i>'Brazil 2014'</i> <sup>8</sup> the reader is shown a web of different soccer clubs represented in the 2014 World Cup. The reader is also able to select which teams, groups or stages they can see. It further customizes the information presented and lets the reader see the story they want to be told.

**Table 4. Overview of data visualization techniques in storytelling.**

2 <http://www.nytimes.com/interactive/2015/03/19/upshot/3d-yield-curve-economic-growth.html>

3 <http://www.nytimes.com/interactive/2014/09/14/sports/baseball/jeter-swings.html>

4 <http://www.nytimes.com/interactive/2014/07/31/world/middleeast/in-gaza-a-pattern-of-conflict.html>

5 <http://www.nytimes.com/2014/09/05/upshot/4th-down-when-to-go-for-it-and-why.html>

6 <http://www.nytimes.com/interactive/2015/03/19/upshot/3d-yield-curve-economic-growth.html>

7 <http://www.nytimes.com/interactive/2015/09/30/business/how-the-us-and-opec-drive-oil-prices.html>

8 <http://www.nytimes.com/interactive/2014/06/20/sports/worldcup/how-world-cup-players-are-connected.html>

For their efforts in developing visual journalism, *The New York Times* have won multiple awards: in 2012, a Peabody Award<sup>17</sup>, Webby Award for Online Film & Video: Best Use of Interactive Video, the coveted Feature Writing Pulitzer Prizes. Most recently the Pulitzer Prize was awarded for a story developed with multiple visual techniques in 2017<sup>18</sup>.

Many tools are used to create data visualizations within stories. Each of them provides diverse functionalities and many are utilized in parallel in one newsroom. The table below provides an overview

17 <http://www.nytimes.com/projects/2012/snow-fall/#/?part=tunnel-creek>

18 <http://www.nytimes.com/interactive/2016/12/07/world/asia/rodrigo-duterte-philippines-drugs-killings.html>

of the most common tools, with specific examples of how they have been used in the newspaper story.

Technique	Description & examples
Zentrick	Used to enhance videos with interactivity. Readers not only learn about what is being reported, but are also able to interact with the article. Example: In <i>'Prescribed: A Personalized Tour of Obamacare'</i> (2014) <sup>9</sup> , The Wall Street Journal gives the reader a chance to see what it is like to be on Obamacare and what services it provides. Instead of reading about it, readers are immersed in the life of someone using Obamacare to their advantage. It has an air of virtual reality, where viewer can pause the video and interact with objects around them, much like augmented reality. This article was nominated for an Emmy Award in News and Documentary in 2014.
Mapbox	Allows readers to get a better understanding of where things are located in stories about specific locations. The reader has the option to navigate the provided maps to get a better visualization. Mapbox is used by many international newspapers, including the WSJ, USA Today, The Guardian, Le Monde, Die Zeit and Financial Times. Example: In <i>'Fears are growing the Syrian war might become a region-wide religious conflict'</i> (2013) <sup>10</sup> the Financial Times allowed its readers to see the ethnic distributions of different Middle Eastern countries and provided visualization of what the article described.
StorymapJS	Enables a reader to see inside a map and gain a better understanding of what went on at a certain point on a map. Example: <i>'Two years, two NoCo killings, too few answers'</i> (2017) <sup>11</sup> by USA Today. Within the map accompanying the article, as the reader clicks through the tabs, it zooms into different kinds of media highlighting what went on at different points on the map. It ranges from text, to images, to YouTube videos all accompanied with text.
Odyssey.JS	This tool is similar to Storymap and gives more context to the maps displayed by zooming into the map and providing more detailed text. One is able to scroll through and automatically zooms into points on a map. Example: In <i>'After bloody weekend of 16 shootings and 19 wounded, cops arrest only 2 as number of city shooting victims spikes'</i> (2014) <sup>12</sup> by The New York Daily News, the reader learns about the rising crime rates in New York. To supplement the article, a map is provided that shows different points in New York where crimes were committed, with pictures and text describing what occurred.
TimelineJS	Allows the reader to get a visualization of a timeline of events along with detailed descriptions, videos or pictures to accompany the text. Instead of just getting a date, one can see what happened on the date and have a better view as to when it occurred in the context other events. TimelineJS can pull in media from a variety of sources. Twitter, Flickr, YouTube, Vimeo, Vine, Google Maps, Wikipedia, SoundCloud, and more. Example: <i>'An interactive timeline of key moments in the Trump-Russia investigation'</i> (2017) <sup>13</sup> by The Washington Post. In it, the reader can see several different events related to the Trump-Russia investigation. It allows the producer to pack in a lot of information and give the reader a better understanding of the chain of events in a story.

Table 5. Overview of data visualization tools for storytelling.

9 <http://graphicsweb.wsj.com/documents/prescribed/>

10 <http://ig-legacy.ft.com/content/705f7ce4-f9c8-11e2-b8ef-00144feabdc0#axzz2ajL96juk>

11 <http://www.usatoday.com/story/news/2017/05/19/two-years-two-noco-killings-too-few-answers/311761001/>

12 <http://www.nydailynews.com/new-york/nyc-crime/bloody-weekend-19-injured-bullets-cops-arrest-2-article-1.1846552>

13 <http://www.washingtonpost.com/news/politics/wp/2017/07/19/an-interactive-timeline-of-key-moments-in-the-trump-russia-investigation/>

Developing stories with visual techniques is not affiliated with any specific revenue stream. The objective is rather to help audiences to be more curious, to explore the data and turn the numbers into a story. However, the overall results of increased digital subscriptions (discussed in the concluding section) can, with a high degree of certainty, be attributed to innovative and visual journalism and storytelling.

## PODCASTING - 'THE DAILY' AS THE NEW STAR

Episodic audio journalism has become a very popular form of storytelling and engaging with readers and listeners. Since 2006, the NYT has produced a variety of podcasts affiliated with occasional thematic sections of the paper. In February 2017, a weekday show called “The Daily” was launched. This audio-based storytelling initiative has become one of *The New York Times*'s most popular and critically-acclaimed news outlets. Released every weekday morning at six, this podcast provides an approximately 20-minute in-depth analysis of key news stories

In the words of Michael Barbaro, the managing editor of *The Daily*, *The Daily*'s brief but meaningful structure highlights:

Only what you want to know, none of what you don't<sup>19</sup>.  
(Michael Barbaro)

Within each episode, Barbaro provides an objective explanation of one to three current events, supplemented with interviews with usually one to three guest experts. Featured guests have ranged from CEOs and Senators to FBI agents and coal miners, each of whom provides a unique perspective on the current events that Barbaro dissects. Since its launch, *The Daily* has accumulated over 160 episodes and, as of June 1, 2017, been downloaded over 40 million times in total. In August 2017, every weekday edition was downloaded 750,000 times.

*The Daily* has a staff of seven individuals, including the host, Michael Barbaro. These *New York Times* employees begin their workday with a 9:30 am news meeting in order to decide what current events and headlines will be presented on the next morning's episode of *The Daily*. The podcast episode is taped from 1 pm until 4 pm. Staff members then edit the audio files, after which the staff creates a script, that they use to track the progression of the audio of the final podcast. Also, if a breaking news story comes along, the staff members of *The Daily* must come together in order to reorganize their whole show around this new topic.

The combination of *The Daily*'s brevity and relevance appeals strongly to millennials, those on their daily commute, and other individuals in search of their daily news fix. In an interview with *Inside the Times* journalist Susan Lehman, Barbaro explains how podcasts have the ability “to tell stories as only audio can in ways that are hugely compelling and make you feel something”<sup>20</sup>. Using an audio outlet to tell stories adds a humane, compassionate element due to the audience's more intimate connection with the host, which print journalism severely lacks. Hearing Barbaro's voice through a pair of headphones or speakers creates a more intimate learning experience due to his use of inflection, emphasis, and emotional connection with listeners. Through a podcast's listening experience, Barbaro believes that report-

19 <http://www.nytimes.com/2017/06/01/insider/inside-the-daily-with-michael-barbaro.html>

20 Barbaro quoted in Lehman (2017): <http://play.radiopublic.com/inside-the-times-6pvr1G>

ers become more of “a flesh and blood person” that audiences can more deeply connect with and trust<sup>21</sup>.

Nonetheless, not all podcasts have received the positive attention that *The Daily* receives. Listeners still find *The Daily* “unambiguously superior to NPR’s<sup>22</sup> podcast equivalent, *Up First*”<sup>23</sup>. Audiences believe that *The Daily*’s strengths lie in its depiction of deeply emotional narratives that describe both features and headlines that seem relatively timeless<sup>24</sup>. Furthermore, the length of *The Daily* sets it apart from other journalism-based podcasts like *Pod Save America* by Crooked Media and NPR’s *Rough Translation*. Barbaro’s talents as a podcast host, in combination with the depth of each featured story, demonstrate the potential of audio as an innovative storytelling outlet.

*The Daily* excels in connecting emotionally with listeners through impactful stories and genuine emotions. Examples of emotion, as found in the March 30, 2017<sup>25</sup> episode, seem to resonate greatly with audiences. This podcast in particular featured an interview with a coal miner who held an opposing political view, in regard to climate change and the use of coal, from that of Barbaro and the majority of *The Daily*’s listeners. Many audience members wrote to *The Daily* after the podcast’s release thanking Barbaro for “having a human conversation with somebody” while others asked why Barbaro did not correct the coal miner or argue with him. When questioned about this podcast in particular, Barbaro stated that,

... this was the real emotion I had and I was allowed to have it and listeners should be allowed to hear it and know what the conversation was like and know who I am. (Barbaro)

From this experience, Barbaro and listeners discovered that podcasts, *The Daily* in particular, have the ability to document both news stories and their emotional connotation like never before. The importance of exhibiting emotion when presenting a narrative to listeners is considered a major factor in the ever-increasing popularity of this podcast. Audio’s ability to capture emotional and sentimental qualities in journalism enables it to capture value that would otherwise go undetected in the use of other storytelling outlets.

Podcasts are offered for free to anyone, not only to paid subscribers, and for this reason they do not provide any additional revenue. Since they offer segments related to other content published on the NYT website, they aim to convince listeners to explore other content behind the paywall. The standard format of each podcast consists of two deeply reported stories de jour, and closes with a few headlines worth paying attention to during the day. Despite their simplicity, they still cost something to produce, so to offset the cost sponsors have been invited to contribute. The sponsor during the launch was BMW. The revenues from this sponsorship and from other advertising/ sponsorship income related to this podcast are not publicly available.

Rather than being a tool for increasing revenues, the podcast aims to develop personal relationships with listeners, showcasing the quality and value of the NYT’s journalism. Since its debut in January 2017, main host Michael Barbaro has received praise and recognition among radio presenters and podcasting experts. He has also garnered a large and loyal following who regularly tweet about him and share memes with his pictures. Developing loyal followers and having a product that is widely discussed on social media can create future opportunities for monetization.

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21 Ebit

22 NPR - National Public Radio - public broadcasting organization financed with public funds, comparable equivalent of YLE Radio

23 Quah, N. (2017): <http://www.niemanlab.org/2017/05/the-new-york-times-the-daily-vs-nprs-up-first-which-morning-news-podcast-is-better-at-what/>

24 Ebit

25 <http://www.nytimes.com/2017/03/30/podcasts/the-daily/scott-pruitt-coal-mining.html> conversing with a Kentucky Coal Miner on *The Daily* about the future of coal mining



Tools	Functionalities
Production	All tools offer editing functions (record, mix, edit and master audio), with some of them free like Audacity or Ardour, and others based on commercial licenses and offering advanced functions to support a complete digital audio production, like Reaper. Another category of tools includes podcast hosting services like Hipcast or Libsyn (used by NPR and Harvard Business Review).
Consumption	Basic functionalities (play, find, skip, subscribe) are offered by a wide variety of free apps on mobile devices like preinstalled Apple Podcasts or Google Play Music. Other apps like Pocket Casts and Overcast offer premium paid features to boost voices or skip silent moments. Another group of apps also offers podcast functionalities and content but have a different primary focus, such as Spotify (music) or Audible (audiobooks).

Table 6. Overview of podcast tools and their functionalities.

## SOCIAL MEDIA PRESENCE AND EXPERIMENTING WITH THE REACH TO VERY YOUNG AUDIENCES

From the very early days of social media platforms like Facebook, Twitter and Instagram, *The New York Times* has been actively present to engage with readers by alerting them to new content or sharing breaking news. It continuously maintains a large collection of social media accounts (so-called “handles”)<sup>26</sup>, although the posts are entirely links to the content existing on the website in a different format and fitting the specificity of each social media platform.

For example, on August 5, 2017, the *New York Times* made a post from its @nytimesfashion<sup>27</sup> account. When the reader swipes up to see more, the post sends them to a Times Video article on the NYT mobile site entitled: ‘Models Talk: Racism, Abuse and Feeling Old at 25’<sup>28</sup>. On the mobile site, this video only gives the options to share on Facebook, Twitter, LinkedIn, email and save a link. However, when accessed through the link on a desktop, there is an option to click on the link titled: ‘What It’s Truly Like to Be a Fashion Model’<sup>29</sup>, which gives the reader even more of the story to read. This same story was posted on the New York Times Facebook page<sup>30</sup> with a link back to the same New York Times website<sup>31</sup>. There was no mention of this story on Snapchat, but it was posted twice on Twitter.

Live streaming on YouTube is gaining attention. Most recently, NYT streamed ‘*Watch the Solar Eclipse Across the US - Solar Eclipse 2017*’<sup>32</sup>. It does not provide journalistic commentary in the way TV channels traditionally would; rather it is a series of video clips of the eclipse throughout the US. Similar, a no-commentary live stream of the full OJ Simpson parole hearing was featured on July 20<sup>33</sup>, 2017. It is also worth noting that this was a stream provided by the Associated Press, but hosted on the New York Times YouTube account. This YouTube account also features videos hosted on the NYT website.

26 List of social NYT social media accounts: <http://www.nytimes.com/contact-us/>

27 <http://www.instagram.com/nytimesfashion/>

28 <http://www.nytimes.com/video/fashion/10000005367006/models-talk-racism-abuse-and-feeling-old-at-25.html>

29 <http://www.nytimes.com/2017/09/05/fashion/models-racism-sexual-harassment-body-issues-new-york-fashion-week.html>

30 <http://www.facebook.com/nytimes/videos/1911827369034776/>

31 <http://www.nytimes.com/2017/09/05/fashion/models-racism-sexual-harassment-body-issues-new-york-fashion-week.html>

32 <https://www.youtube.com/watch?v=B-DB5vIYQtg>

33 <https://www.youtube.com/watch?v=o-NoeUfGtU>

Many journalists are present in a personal capacity on Twitter, sharing news and commenting on current events, not necessarily within the domain of their specialty or stories they work on. NYT has created a list of all those accounts (685 as of 12 September 2017), and enabled Twitter users to subscribe to this list<sup>34</sup>.

Snapchat is a very different social media platform that allows users to distribute short-lived photos and videos (ephemeral communication). The NYT team has paid particular attention to this platform and engaged in creating content just for it. Snapchat's Discover is a feature that allows content partners to send messages to their users. These Discover stories feature aesthetically-appealing graphics made to entice viewers, and additional interactive features to appeal to audiences.

*The New York Times's* Snapchat Discover stories feature visual content that highlights major sentences and ideas from that day's news. These stories use colours, moving graphics, and additional animations in order to appeal to the younger audiences using social media, while still maintaining the professionalism and hard-hitting journalistic intent of this renowned news brand. The NYT began using Snapchat in 2015. In early 2015, it started to experimentally post snapchats and snapchat story videos via its Snapchat account @thenytimes. As Snapchat updated and allowed users to become more creative, the NYT gained a large number of followers and maintained the public's interest with interactive stories and interesting snippets from the day's news. It began officially operating under the Snapchat Discover section (which features various news outlets like *The Wall Street Journal* and *The Washington Post*) on April 24, 2017. Snapchat launched its Discover section in June 2016, but NYT was cautious in joining at the very start of this development.

Having a presence on Snapchat allows the NYT to reach a wider and mostly younger demographic interested in news stories. Featured articles on the Snapchat Discover stories allow audiences to subscribe to the NYT's Discover page in order to always receive their daily updates. The NYT Discover stories feature a daily briefing summary of the day's most important events and a fun mini-crossword puzzle, but it does not include many videos. The content is optimized for commuters and published every weekday morning. At the moment it is not used for breaking news or so called "evergreens". NYT is still experimenting with using this channel of communication with very young audiences, who are not typical consumers of NYT content.

Since the media content of Snapchat disappears after 24 hours, it is impossible to look into the archives or showcase good past examples. Here we provide a description of NYT Snapchat Discover stories posted on 12 and 13 September:

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34 <http://twitter.com/nytimes/lists/nyt-journalists/members>

12 September	Description & examples
<i>“The Aftermath of Hurricane Irma” in Florida</i>	This story featured real photographs, story snippets, and direct quotes from those affected by this tragic occurrence. It was three pages in length and included a feature that allowed readers to scroll up and read the whole NYT article.
<i>“Kim Jong Un”</i>	This article about South Korea’s defence features photographs as well as highlighted and boxed quotes in order to provide viewers with a simple format where they can easily piece together the most important information.
<i>“What Does it Really Cost to Make a Cancer Drug?”</i>	This fun-fact article featured 6 sentences, 5 of which were statistics. The eye-catching graphic and moving figures enticed viewers and provided them with relevant and accurate information.
13 September	
<i>“An Important First Step”</i>	With large font and highlighted main points, this three-page article depicted the rapid spread of alcoholism in Iraq despite an alcohol ban that began in 1979. Each page featured just a few sentences and moving photographs to attract readers and then inform them quickly.
<i>“Why Floridians Could Go Weeks Without Power”</i>	Moving pictures that depicted the aftermath of Hurricane Irma in cities in Florida invited readers to “scroll up” to read the full article on the state’s devastation. With additional videos and photos, boxed quotes, and highlighted areas, readers skimming the text could easily understand the key points without reading the whole article.

**Table 7. Examples of New York Times Snapchat Discover stories.**

In March 2017, the NYT established a “Reader Center”, an entirely new unit to “*capitalize on our readers’ knowledge and experience*”. In partnership with reporters, columnists and editors in the newsroom, the reader center’s objective is to experiment with new formats to reach out to and engage audiences and to improve how the NYT responds directly to tips, feedback, questions, concerns, complaints and other queries from the public arriving through email, social media or other channels. The Reader Center, based on the News Desk, works across the newsroom and has close ties to the marketing division.

Although it is very recent, this initiative showcases the NYT approach of constantly thinking about how to engage with users and how to work more closely with reader communities. In creating the Center, the position of “public editor” has been eliminated and all tasks associated with this role have been incorporated to the team of the Reader Center.

Since it is a new initiative in the experimentation stage, not many of the lessons learned have been communicated so far. A specially dedicated section of the webpage “Reader Center”<sup>35</sup> features all discussions and readers’ feedback to recently-published stories . It provides transparency about readers’ comments and enables the editorial room to moderate debates. It empowers journalists to respond directly to readers, with the aim to increase accountability and quality in their journalism.

<sup>35</sup> <http://www.nytimes.com/section/reader-center>

Examples of projects in 2017:

- Journalist responding to criticism of how the coverage of a Swedish journalist's death in Denmark used culturally insensitive examples from Scandinavian thrillers. The story was amended with an apology and explanation.
- Q&A session responding to readers' questions about the craft of journalistic work, how information is verified, and how creation of the readers' desk may affect employment of their favourite editors.
- Reaching out to readers to comment on a short documentary about women in Saudi Arabia. After receiving nearly 6.000 comments, NYT used the responses to create a follow-up story addressing those comments.

## SUMMARY AND CONCLUSIONS

This concluding section sifts through the content of the report, looking at factors that might contribute to the success of newspaper organizations. Oversimplification is dangerous, since there is no universal solution, but the examples provided may serve as inspiration.

The preceding sections provided an inside view into how *The New York Times* has been enhancing its ability to deliver new features and create more analytical, conversational stories. A growing number of readers pay attention to the quality of journalism in a comfortable form. Virtual and Augmented Reality, podcasts, visual communication and audience outreach all serve the same general purpose: to create stories worthy of readers' time and money.

The most recent financial result of the NYT (27 July 2017)<sup>36</sup> indicates that subscription revenue has grown significantly in the first quarter of 2017 - general growth of all subscriptions (print and digital) has increased by 13.9 per cent, while the advertising revenue has grown only 0.8 per cent. In particular, digital-only subscriptions reached 2.3 million subscriptions, which is a 63,4 per cent increase over the previous 12 months. This is very impressive growth, even accounting for the possible influence of the "Trump effect". It clearly indicates that the digital products provided by the "Gray Lady" are providing something that is worth paying for. Innovative, digital storytelling is not the only factor that may have contributed to this success, but was certainly a strong contributing factor. The bottom line is that NYT provides something extra to its subscribers, content and services not easily found elsewhere, and importantly, content that is not such commodity content that would be undifferentiated from what other media can offer.

The following patterns emerged during the research and show which elements could be indicators of good practice:

- Aggressively trying new ideas and allowing for experimentation. If an idea fails, changing focus and trying something new. It is visible across all storytelling initiatives, nearly all of which, regardless of how long they have been in the company, are described as "still in experimental stage".
- Extensive investment in many tools and technologies, through which many software tools and techniques are tested. The size of the NYT and the market it operates in provides much greater financial resources than many of its small competitors, probably not comparable with Finnish market realities. Nevertheless, whenever possible it searched for collaborating partners who could sponsor new initiatives or products. Its partnerships with Google and Samsung in the VR projects are good examples of such practice.
- Timing and agility seems to be an important factor. When new features to deliver value to readers gain traction on the market, NYT teams are formed to test them, and if they gain attention, they are expanded and given considerable attention. One example in storytelling is AR, where it was assessed to be a potentially good option from the start, even if the journalistic team lacked skills or knowledge of this highly technical domain.

<sup>36</sup> <http://investors.nytimes.com/press/press-releases/press-release-details/2017/The-New-York-Times-Company-Reports-2017-Second-Quarter-Results/default.aspx>

- A solution was created by allowing for an internal testing period to build competency, purchasing two small startups that brought proprietary technologies and staff, and then rolling it out in an area where the risk of losing customers was not too great. Examples of this are the VR team and Brand Studio, which operate like start-ups within the established company.
- Staying close to readers and continuously improving to serve their needs – the creation of the “Readers Center” is an example of such focused thinking. This strategy is relatively simple, but in a fast-moving environment it needs to be very straightforward, otherwise it risks being pushed to the side. Simple and easily conceptualized concepts are the ones that are favoured and acted upon, over the more complicated, longer-horizon plans that tend to be formulated in “traditional”, legacy type organizations.
- Close integration of technology experts and journalists, who work in joint teams, enabling them to influence each other and create synergies., Such solutions have been implemented in nearly all the new initiatives related to digital storytelling. The IT / tech division is no longer a separate support team for journalists and reporters.
- Digital-first thinking and pro-digital culture is openly communicated as a vision and strategy of the *New York Times*. Readers are encouraged to use digital tools and to communicate directly using multiple channels, and the focus is placed on preparing each outcome in a form that is easy to access. Focusing on revenue growth that comes from digital-only products (not on traditional “print subscribers”) is a sign of this attitude.
- Technology skills have become more important in hiring decisions and in leadership positions. In an initiative described in our report, leaders had previous experience in operating in both worlds (journalists and tech programmers/analysts).
- Having a vision as to where the company wants to go and what challenges lie ahead. Although specific examples were not covered in this report, in January 2017 *The New York Times* openly published its 2020 vision<sup>37</sup>, articulating its goals to the outside stakeholders and accelerating their adoption inside the company.

These observations and lessons learned from how an established, “traditional” newspaper organization is integrating digital storytelling to its core of journalism show not only the importance of knowing the technologies but also how to integrate them in the every day flow and practices of preparing daily editions of the digitally focused, but still existing print newspaper.

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37 <https://www.nytimes.com/projects/2020-report/>

# YHTEENVETO: SANOMALEHTIKENTTÄ YHDYSVALLOISSA KEHITTYY HAJANAISESTI

Sanomalehtien tavoitavuus on ollut pitkään laskussa Yhdysvalloissa. Vuosituhannen vaihteessa sanomalehdet tavoittivat päivittäin vielä hieman yli 55 prosenttia aikuisväestöstä. Viimeisimmät saatavilla olevat tiedot vuodelta 2012 osoittavat sanomalehtien tavoitavuuden laskeneen vajaan 42 prosenttiin. Kehitystä tarkasteltaessa on huomioitava, että paperinen lehti on edelleen selvästi suosituin tapa lukea sanomalehteä. Vuonna 2015 noin puolet (51 %) sanomalehtiä lukevasta aikuisväestöstä Yhdysvalloissa luki pelkästään paperilehteä. Pelkästään tietokoneelta ja/tai mobiililaitteelta sanomalehtiä lukevien aikuisten osuus oli noin viidennes (17 %).

Mediamainonnan rakenteessa on viimeisten kymmenen vuoden aikana tapahtunut myös huomattavia muutoksia. Sanomalehtien, mukaan lukien ilmaislehdet, osuus mediamainonnasta oli Yhdysvalloissa vuonna 2006 vielä vajaa kolmannes. Sen jälkeen suunta on ollut selvästi laskeva ja vuonna 2015 niiden osuus mediamainonnasta oli enää vain noin kymmenesosa (10,9 %).

Toimialatasolla tarkasteltuna, huolimatta sanomalehtien digitaalisten tuottojen kasvusta, valtaosa sanomalehtien tuotoista kertyy edelleen painetuista lehdistä. Viimeisimpien Newspaper Association of America julkaisemien tietojen mukaan vuonna 2014 painettujen sanomalehtien ilmoitustuotot muodostivat hieman yli 80 prosenttia kaikista sanomalehtien ilmoitustuotoista. State of the News Media -raportin arvion mukaan vuonna 2016 digitaaliset ilmoitustuotot olivat noin 29 prosenttia julkisesti noteerattujen sanomalehtiyhtiöiden kokonaisilmoitustuotoista. Ainakaan toistaiseksi sanomalehdet eivät ole pystyneet digitaalisen mainosmyynnin kasvattamisella korvaamaan ilmoitustuottojen huomattavaa laskua painetuissa sanomalehdissä.

Digitaalisen siirtymän ja verkkomedian vahvistumisen seurauksena mainonta perinteisissä medioissa on vähentynyt selvästi, ja vuosituhannen vaihteen jälkeiset vuodet ovat olleet vahvaa verkkomediamainonnan kasvun aikaa. Vuonna 2006 verkkomediamainonnan osuus mediamainonnasta Yhdysvalloissa oli hieman yli kuusi prosenttia, josta se nousi vuoteen 2015 mennessä jo lähes 30 prosenttiin (28,3 %). Verkkomainonnan osuus mediamainonnasta onkin noussut toiseksi suurimmaksi televisio- ja mainonnan jälkeen, ja sen osuus on jo lähes kolminkertainen sanomalehtien osuuteen nähden (vuonna 2016 online-mainonnan kokonaisarvo Yhdysvalloissa oli noin 72,5 miljardia dollaria). Tarkasteltaessa online-mainonnan kehitystä ja mediamainontamarkkinoiden rakenteen muutosta on välttämätöntä huomioida ns. perinteisen median ulkopuolelta tulevat toimijat, sillä suurin osa online-mainonnan kasvusta ja volyyymistä menee kahdelle yritykselle, Googlelle ja Facebookille.

Toimintaympäristön muutokset näkyvät selvästi myös alan henkilöstömäärän kehityksessä. Bureau of Labor Statisticsin tilastojen mukaan sanomalehtikustantamisalalla työskenteli vuosituhannen vaihteessa Yhdysvalloissa lähes 424 000 henkilöä. Vuoteen 2016 mennessä tämä luku oli laskenut lähes 60 prosenttia hieman yli 183 000 henkilöön. Vastaavana ajanjaksona internetin julkaisu- ja lähetystoiminnan kokonaishenkilöstömäärä yli kaksinkertaistui hieman yli 88 000 henkilöstä lähes 198 000 henkilöön. Sanomalehtien toimitusten kokonaishenkilöstömäärä vuonna 2015 oli 41 400 työntekijää. Tämä oli neljä prosenttia vähemmän kuin edellisvuonna ja noin 37 prosenttia vähemmän kuin vuonna 2004.

Muutostilanteessa sanomalehtiyhtiöiden on toisaalta siirryttävä kohti digiaikaa, toisaalta pidettävä huoli printtilehden tulovirroista. Liiketoimintamallin muutoksessa on otettava huomioon myös suhteet lukijoihin, mainostajiin ja muihin yhteistyökumppaneihin. Teimme keväällä ja kesällä 2017 yhteensä 35 tutkimushaastattelua Yhdysvalloissa sekä suurissa että pienissä sanomalehtiyhtiöissä ja myös alan liittojen edustajien, analyytikkojen ja tutkijoiden kanssa. Haastatteluiden perusteella Yhdysvalloissa-kaan ei ole löydetty yhtä ylivertaista uutta liiketoimintamallia, vaan menestyneillä julkaisuilla on useita erilaisia ratkaisuja. Suomalaisen sanomalehtijulkaisijoiden ei siten kannata lähteä hakemaan Yhdysvalloista yhtä ratkaisumallia vaan muodostaa oma lähestymistapansa tutustuen erilaisiin ideoihin ja malleihin.

Tärkeintä on kuitenkin myös Suomessa miettiä miten koko “sanomalehtikoneen” toimintamalleja on mahdollista muuttaa, esimerkiksi pohtimalla keinoja irtaantua niin sanotusta sekatarvakauppamallista. On siis syytä pohtia tarvetta laajemmalle ajatusmallin muutokselle, sen sijaan että tehdään vain yksittäisiä kokeiluja. Sanomalehtien on erotuttava ja tarvittaessa erikoistuttava, samalla kun niiden on tunnettava välttämättömiltä mahdollisimman suurelle joukolle ihmisiä. Tutkimushaastatteluistamme voi vetää myös sen johtopäätöksen, että sanomalehtien olisi parempi tunnustaa, että ala on jatkuvassa muutoksessa, kuin luottaa siihen että myrsky laantuu muutaman vuoden kuluessa ja palataan jonkinlaiseen stabiiliin aikaan. Odottelu voi helposti olla luisumista hitaaseen epäonnistumiseen (failing slowly), joka muuttuu jossain vaiheessa niin sanotuksi kuolemankierteeksi (death spiral).

Seuraavassa on esimerkkejä tutkimuksessamme havaituista käytännöistä sanomalehtien muutoksessa.

#### Taulukko 8. Esimerkkejä sanomalehtien liiketoimintamallin muutoksesta.

Sanomalehti	Toimintamallit
Dallas Morning News	Tarjoaa digitaalisia mainonta- ja markkinointiratkaisuja asiakkailleen, myös sisältömarkkinointia, tuotteiden lisensointia, kehittyneitä hakupalveluita ja ta- pahtumia.
Miami Herald	Sanomalehti on ottanut verkkoliikenteen analysointityökalut tehokkaasti käyttöön. Käytössä ovat muun muassa Metrics for news ja Chartbeat, joiden avulla toimitus päättää, minkälaista sisältöä kannattaa lukijoille tarjota. Toimituksen johto on siirtänyt toimittajia kirjoittamaan kokonaan uusista aihealueista, kun heidän aiemmin seuraamansa aihepiiri ei ole kerännyt riittävästi kiinnostusta. Lehden entinen elokuvakriitikko kirjoittaakin nykyään kiinteistökaupoista ja urheilukolumnisti Miami Aggravations -palstalla asioista, jotka ärsyttävät kaupungin asukkaita.
Deseret News	Mormoni-lehdellä on perhearvoin (mutta ei kuitenkaan uskontoon) perustuva kansainvälinen strategia. Facebookin kautta hankitaan globaali yleisö, joka nyt koostuu noin 250-300 miljoonasta ihmisestä. ”Rakastan perhettäni” ja ”Rakastan isääni/äitiäni/veljeäni/siskoani” -sivut ovat osa kymmenien Facebook-sivujen kokoelmaa.
Coronado Eagle & Journal	Pysyy tiukasti paperilehtenä ja luottaa siihen, että sen ilmestymisalueen (Coronadon saari San Diegon edustalla) konservatiivinen yleisö kulkee mukana. Menestyksen avain on päivittäinen vuorovaikutus ihmisten kanssa, jotka elävät ja työskentelevät saarella. Tämä vuorovaikutus antaa lehdelle suoran yhteyden lukijoiden elämään, kiinnostuksen kohteisiin ja tarpeisiin.

The Washington Post	Sähköpostitse jaetut uutiskirjeet ovat yksi mediatalon tärkeimmistä tavoista tavoittaa ja sitouttaa lukijoita, tuoda yleisö lähemmäksi. The Washington Post on kaikkiaan muuttunut vahvasti teknologiataloksi, joka myös myy kehittämiään palveluita ja ratkaisuja (esimerkiksi Arc-julkaisualusta) muille alan toimijoille.
Embarcadero Media	Kehittää sähköpostin kautta jaettuja uutiskirjeitä nuorille Palo Alto seudulla Piilaaksossa. Uutiskirjeiden suosio nousee ja pienetkin mediat ovat lähtemässä mukaan trendiin. Tarjoaa asiakkailleen markkinoinnin ja mainonnan konsultti-apua.
Voice of San Diego, Billy Penn (Philadelphia)	Paikallisia verkossa toimivia uutis-startupeja, jotka järjestävät paljon tapahtumia. Tapahtumat selvästi kiinnostavat ihmisiä ja lisäävät sitoutumista sekä tuovat merkittävästi tulovirtaa.
Gatehouse Media	Lehtiketju haluaa olla paikallisten yritysten ja organisaatioiden uskollinen partneri, joka auttaa niitä digitaalisen markkinoinnin ja mainonnan maailmassa. On kouluttanut 1300 konsulttia, jotka tekevät työtä asiakkaiden kanssa. Järjestää paljon tilaisuuksia tapahtumayrityksensä kautta. Sanomalehtien sivu- ja mainostuotanto on keskitetty Austiniin, jossa työskentelee melkein 300 ihmistä.
New York Times	Journalistien ja teknologia-asiantuntijoiden tiivis yhteistyö tuottaa virtuaalitodellisuutta ja lisättyä todellisuutta hyödyntäviä avauksia. Podcast-lähetys on yksi uusista tähtituoiteista ja sosiaalinen media on aktiivisessa käytössä vuorovaikutukseen lukijoiden kanssa, tavoittaa myös nuoria. Lehden tilaukset, erityisesti digitilaukset, ovat kasvussa.
Boston Globe	Uudistanut myyntiorganisaationsa, ja kaikilla uusilla työntekijöillä on kokemusta digitaalisesta toimintaympäristöstä sekä teknologian ymmärrystä. Lehtitalo pyrkii muodostamaan kumppanuussuhteita mainostoimistojen kanssa. Aikoo panostaa lisää asiakas- ja muun datan ymmärtämisen ja hyödyntämisen koulutukseen.

Suurimpien liiketoimintahaasteiden kanssa kamppailevat suurkaupunkialueiden sanomalehdet (metro newspapers). Ne ovat riippuvaisia (laskevista) printin tuloista ja samanaikaisesti monessa lehdessä digitoimintojen kehitys on ollut hidasta. Sanomalehtien omistaminen keskittyy ja eri toimintojen virtaviivaistaminen ja kustannusten leikkaaminen jatkuu voimakkaana (esimerkkinä tästä Gatehouse Media). Pienissä paikallisjulkaisuissa taas on hyvin vaihtelevia tapauksia: jotkut pitäytyvät uskollisesti printissä ja myös menestyvät taloudellisesti siinä mainos- ja/tai tilausmyynnin ansiosta (esimerkiksi *Coronado Eagle & Journal*), toiset ovat puolestaan kokonaan digitaalisia ja toimivat esimerkiksi jäsenyyspohjaisen tilausmallin mukaan (*Voice of San Diego*).

Toisaalta löytyy myös esimerkkejä perinteisistä sanomalehtitaloista, jotka ovat luoneet täysin uutta globaalia digitaalista liiketoimintaa (*Deseret Digital Media*) tai hajauttaneet tulo muodostusta merkittävästi (*Dallas Morning News*). Yhteistyö ja verkostoituminen mainostajien kanssa vaikuttaa olevan yksi keskeinen teema monessa mediatalossa, erityisesti sähköisen kaupan nopean kasvun takia, jossa Amazon on nakertanut monien perinteisten mainostajien liiketoimintaa.

Suhtautuminen Googleen ja Facebookiin vaihtelee. Yleensä lehtitalot pitävät tärkeänä tehdä yhteistyötä niiden kanssa, koska niiden avulla mediatalo pystyy hankkimaan uusia asiakkaita. Hyvin monessa haastattelussa tuli esille se, että ”kaikkea kaikille”-julkaisumalli ei enää toimi, vaan sanomalehden on erotuttava ja tarvittaessa erikoistuttava – tarjottava sellaista sisältöä kuluttajille mitä muualta ei saa. Kirojana monessa haastattelussa oli ”commodity news”, siis se että lehdet tuottavat liikaa tasapaksua (uutis)kulutustavaraa.



Lukijoiden sitouttaminen oli haastatteluissa myös keskeinen aihe ja asiakkaiden (lukijat, mainostajat ja muut yhteistyötahot) tarpeiden tunnistaminen ja huomioiminen on avain tulevaisuuden kannalta. Ihmiset eivät enää välttämättä tilaa sanomalehteä vain sen takia, että se ilmestyy heidän kaupungissaan. Toisaalta valeutiskeskustelu (ja Trump-efekti laajemminkin) on aiheuttanut vastareaktion, jonka seurauksena Yhdysvaltojen keskeiset laatusanomalehdet ovat keränneet uusia tilauksia. Haasteita on siinä, miten mitata lukijoiden sitoutumista; tähän käytetään ohjelmia kuten Chartbeat, mutta voidaan pohtia mittaavatko nämä oikeita asioita uutistoiminnan kannalta.

# HAASTATELTAVAT

Tekstissä kerrotaan haastateltavasta satunnainen tunnustenumero ja asema. Alla olevan luettelon numerointi ei vastaa haastattelulainauksen numerointia.

	Nimi	Asema	Yhtiö/instituutio	Paikkakunta	Haastattelu-päivämäärä
1	Russell Banz	Vice President, products	Deseret Digital Media	Salt Lake City, UT	18 February 2017
2	Michael Bentley	Director of Digital Sales	Boston Globe/Boston.com	Boston, MA	9 May 2017
3	Joshua Benton	Director of the Nieman Journalism Lab	Nieman Foundation at Harvard	Boston, MA	8 May 2017
4	Paul Boyle	Senior Vice President / Public Policy	News Media Alliance	Washington DC	27 April 2017
5	Jim Brady	CEO	Spirited Media (Billy Penn in Philadelphia, The Incline in Pittsburgh, and Denverite in Denver)	Denver, CO	19 May 2017
6	Madhav Chinnappa	Director of Strategic Relations for News and Publishers	Google	London, United Kingdom	9 August 2017
7	H. Iris Chyi	Associate Professor	University of Texas at Austin	Austin, TX	26 May 2017
8	Lora Cicalo	Managing Editor	San Diego Union-Tribune	San Diego, CA	23 May 2017
9	Kirk Davis	CEO	GateHouse Media	Pittsford, NY	26 May 2017
10	Ken Doctor	Media Analyst	Newsonomics	Santa Cruz, CA	27 February 2017
11	Dean K. Eckenroth	Editor in Chief	Coronado Eagle & Journal	San Diego, CA	24 May 2017

12	Jim Ewert	General Counsel	California Newspaper Publishers Association	Sacramento, CA	24 February 2017
13	Frederic Filloux	Media Analyst	Monday Note	Palo Alto, CA	23 February 2017
14	Clark Gilbert	President, Brigham Young University-Idaho (BYU-Idaho). Formerly Deseret Digital Media CEO	Brigham Young University-Idaho (BYU-Idaho)	Provo, UT	24 April 2017
15	Jeremy Gilbert	Director of Strategic Initiatives	The Washington Post	Washington DC	21 April 2017
16	Ben Hamamoto	Research Manager	Institute for the future	Palo Alto, CA	22 February 2017
17	Lyn Jeffery	Distinguished Fellow	Institute for the future	Palo Alto, CA	22 February 2017
18	Bill Johnson	President & CEO	Embarcadero Media	Palo Alto, CA	27 February 2017
19	Matt Karolian	Social Media Director	Boston Globe/Boston.com	Boston, MA	9 May 2017
20	Patrick Kerkstra	Managing Editor, Digital Content	Philadelphia Media Network (The Inquirer, Daily News, Philly.com)	Philadelphia, PA	May 11, 2017
21	Kathleen Kingsbury	Managing Editor, Digital	Boston Globe	Boston, MA	9 May 2017
22	Chris Lee	President/Global	Deseret Digital Media	Salt Lake City, UT	18 February 2017
23	Scott Lewis	Editor in Chief	Voice of San Diego	San Diego, CA	24 May 2017
24	Jeff Light	Publisher, Editor in Chief	San Diego Union-Tribune	San Diego, CA	23 May 2017
25	Timothy Marken	Chief Growth Officer	Boston Globe	Boston, MA	9 May 2017
26	Aminda (Mindy) Marques Gonzalez	Executive Editor and Vice President for news	The Miami Herald	Miami, FL	14 July 2017

27	Nicco Mele	Director of the Shorenstein Center on Media, Politics and Public Policy	John F. Kennedy School of Government at Harvard	Boston, MA	12 May 2017
28	Jim Moroney	Publisher and CEO	Dallas Morning News	Dallas, TX	16 May 2017
29	Alex Remington	Product Manager	The Washington Post	Washington DC	16 May 2017
30	Jay Rosen	Professor of Journalism	New York University	New York, NY	9 May 2017
31	Jeff Sonderman	Deputy Director	American Press Institute	Washington DC	12 May 2017
32	Christina Shih	Director of Outreach and Special Projects	Voice of San Diego	San Diego, CA	24 May 2017
33	Nikki Usher	Assistant Professor	George Washington University	Washington, DC	20 April 2017
34	Ben Wermuller	Director of Investments	Matter.vc	San Francisco, CA	23 February 2017
35	Mark Whitehouse	Editorial Board Member	Bloomberg View	New York, NY	25 April 2017

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