



Turning Around the Tanker: Implementing Trinity Mirror's Online Strategy

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Executive Summary

The UK local and regional newspaper industry presents a paradox. On the one hand:

- Profit margins are very high: almost 19% at Trinity Mirror, and 38.2% at the Western Mail and Echo in 2005
- Newspaper advertising revenues are extremely high: £3 billion in 2005, newspapers are the second largest advertising medium in the UK

But on the other hand:

- Circulations have been declining steeply: 38% drop at Cardiff's *Western Mail* since 1993, more than half its readers lost since 1979
- Companies have implemented harsh staffing cuts: 20% cut in editorial and production staff at Trinity Mirror, and 31% at Western Mail and Echo since 1999
- Journalists' workloads are incredibly heavy while pay has remained low: 84% of staff at Western Mail and Echo think their workload has increased, and the starting wage for a trainee journalist is only £11,113
- Reporters rely much more on pre-packaged sources of news like agencies and PR: 92% of survey respondents claimed they now use more PR copy in stories than previously, 80% said they use the wires more often

Companies like Trinity Mirror will not be able to sustain high profits based on advertising revenues because of growing competition from the internet. Their policy to move operations online requires journalists to become "cross-platform content providers" using video cameras and recording podcasts as well as writing stories for print edition newspapers. This will generate additional work although they refuse to hire more editorial staff. Management know they will encounter resistance to the move from employees, but are bullish about pushing through the changes.

Journalists in Trinity's regional newsrooms are very concerned about the changes in their working conditions that digital journalism will bring, but they *do* believe the internet represents the future of journalism:

- 86% of staff at the Cardiff newsroom believe the future of the local and regional press involves online news and multiplatform journalism

But they have genuine concerns about how the policy will be implemented.

"Why kill the goose that laid the golden egg? [...] The goose has got bird flu"
Michael Hill, Trinity Mirror's regional head of multimedia on the future of print newspapers

"Pay is a disgrace. When you look at levels of pay [...] in relation to other white collar professionals of comparable age and experience they are appallingly bad". Western Mail and Echo journalist

The move to online is like "turning round an oil tanker [...] some staff will never get it, but they will do what they are told to do"
Michael Hill, Trinity Mirror's regional head of multimedia

"Expecting hard-pressed staff to take on yet more responsibility with hardly any training, no increase in salary and no reduction in the rest of their workload is simply not on." Trinity Mirror regional journalist.

- 96% believe that more staff should be hired to cover the extra work created by additional online demands, but 88% do not believe the company will hire any more journalists to cover the extra work.

Reporters have identified five key areas of concern, and worry:

- there will be little investment in extra resources
- their workloads will increase with the introduction of web-first editorial policies and video journalism
- the quality of multimedia news will be poor and that this will reflect badly on established print products
- training will be insufficient
- they won't get any additional pay for their new responsibilities

Experiences of journalists at Trinity Mirror's pilot "digital newsrooms" confirm that all of the concerns held by Western Mail and Echo employees were well founded. Key findings from Trinity newsrooms in Newcastle, Middlesbrough, and Liverpool include:

- Producing internet video news is very resource intensive, and creates significant extra work for both video journalists and their colleagues
- Regional newspaper editors are reluctant to fully implement the multimedia strategy because of tight resources
- The quality of original video content is poor, and journalists are relying heavily on pre-packaged sources of video such as the police, PR firms, and even clip sites like *You Tube*
- Web-first editorial policies result in increased workloads for journalists and sub-editors
- Employees in the Merseyside newsroom have initiated industrial action over the increased workload created by the multimedia strategy and won significant concessions from management over working hours and pay

Trinity Mirror faces a stark choice as it moves online. It can continue to make cuts with an eye on maintaining short-term profit margins and watch the quality of its news decline over time, or it can "invest in journalism" with the aim of producing quality print and digital news products with a view to creating sustainable long-term profits. In the words of one senior academic expert:

"I think people are less concerned about whether the stories on the website are in audio, video, or text, provided there are good stories there. If you keep cutting, you get profits, but after a while you'll pay for it."

"We don't want to prevent the move to new media, I think it's something we should be supporting, but we want it to be properly funded and resourced." NUJ New Media organiser Jenny Lennox

"We see the web as an opportunity to own the whole of Wales with the IC brand." Keith Dye, managing director, Western Mail and Echo

"badly made, badly produced, and they don't do anything to assist the story." Senior academic expert on Trinity Mirror video clips produced so far

"There's not a contradiction between investing in journalism and investing in the web. I think they should put money into journalism but that journalists should not be platform-specific." Senior academic commentator on new media

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Introduction

A recent issue of the *Economist* devoted to the “Future of Newspapers” sounded the death knell for contemporary newspapers describing them as an “endangered species” (*Economist* August 24th 2006). Such gloomy prognoses are increasingly commonplace. American academic Philip Meyer, for example, in his book *The Vanishing Newspaper*, observed with enviable if dubious precision that **“by my calculations, the last reader will disappear in September 2043”**. Some pundits offer more precocious valedictories for local and regional newspapers (Crosbie 2004).

The usual suspects are presented as culpable for newspapers’ impending demise. Declining titles and circulations, advertising revenues colonised by online predators such as the classified advertising website *Craigslist* and *Ebay*, along with the availability of news on diverse and more readily accessible delivery platforms such as the internet, mobile telephony and podcasts; we live, so the claim runs, at a time when news is freely available and all around us; an age of “ambient news” (Hargreaves 2003).

A number of remedies are routinely offered to fend off, for as long as possible, the fateful day when “the last reader” along with their newspaper will inevitably “vanish”. Companies must cut costs, spend less on journalism, shift their editorial priorities away from hard news and politics towards lifestyle journalism, human interest stories and a greater focus on entertainment. **In truth this smacks of the much favoured “minimax” strategy according to which managements seek to minimise costs while maximising revenues.** But the conventional wisdom also advises that regional newspaper companies must seek an accommodation with the web, discover ways to gather and report news for presentation on multiple (print and online) platforms, in ways which will be mutually supportive and synergetic of companies’ financial and journalistic ambitions.

Regional newspaper companies are currently developing and implementing multimedia and online strategies to achieve these objectives. Trinity Mirror claims that:

to survive and thrive we need to respond swiftly to the emerging trends, both commercially and in terms of the journalism we produce. From the editorial viewpoint, that means reinventing ourselves as a multimedia content provider... by turning our print newsrooms into genuine multimedia hubs with our journalists producing content for a range of media. Our traditional media will continue to be vitally important, but video reports for publication on our websites, radio style podcasts and content directed at mobile phone users will become increasingly important elements in the content mix. (Western Mail and Echo Ltd 17th November 2006).

High quality journalism, but reported on multiple platforms, remains the central ambition, but there must also be a change of journalistic style or, perhaps better, a change of journalistic tone. **As Michael Hill, Head of Multimedia at Trinity Mirror expressed it, “journalists must leave the ivory tower and cease viewing journalism as a message handed down on a tablet of stone. They must join the conversation being conducted by bloggers, citizen journalists and readers on the**

websites and comment posts” (Hill 2007). Sly Bailey hit a more relaxed note in a speech to Cardiff Business Club. She presented difficulties with loss of readers and advertising as a temporary blip and implementation of the Trinity Mirror multimedia strategy as an incremental and continuing development (Bailey 2007). She acknowledged that,

the internet represents an enormous challenge to our business models, as we face the twin threats of consumers accessing the web for news and entertainment [...] and advertisers following the eyeballs, but I would argue that the immediate impact of this trend on advertising revenues has been somewhat overstated [...] we expect the cycle to move back into more positive territory. So at Trinity Mirror for some years now, quietly without fuss or fanfare, we have been moving towards our goal of becoming a true multi-platform publisher delivering content and advertising across a range of different media, whenever, and in whatever form our customers demand (Bailey 2007).

Other senior managers articulate the need for prompt and radical change arguing that the need to reassign journalists from print to the production of video materials for use on company websites, for example, is vital. Speaking at a recent conference on “Online Journalism, Citizen Journalism and Blogging” at the University of Central England (January 26th 2007), **Michael Hill** (Regional Head of Multimedia at Trinity Mirror), **acknowledged that some journalists were sceptical and concerned that the new strategy might divert resources from the core print product and asked “Why kill the goose that has laid the golden egg?” Hill’s response is “The goose has got bird flu”** (Bradshaw 2007). **Hill is currently engaged in a series of “Back to Basics” presentations with groups of workers in Trinity Mirror although he acknowledges the process is somewhat akin “to turning round an oil tanker” and the “some staff will never get it... but they will do what they are told to do”** (Bradshaw 2007).

The broad objective of this research is to assess the Trinity Mirror Group’s proposed online strategy for regional and local newspapers in Wales. The research reported here includes (1) an extensive review of appropriate industry, professional and scholarly literatures to provide a background and context for the specific study of the strategy at Trinity Mirror; (2) an archival search examining company records to establish changes in levels of staffing, profitability, revenues, costs and other variables across two decades; (3) responses to a questionnaire distributed to key editorial personnel in Trinity Mirror Wales to collect and present the judgements of journalists, editors, managers and other production workers within the Group towards the proposed strategy and; (4) a series of semi-structured interviews conducted with relevant newspaper staffs, trades unionists and senior academics beyond Trinity Mirror Wales, as well as journalists and editorial staff within the Group. The research also canvasses and reports assessments of an alternative strategy stressing a greater investment in journalistic staffs and resources to buttress editorial content in newspapers (see Appendix A for further details on our methodology).

The report is structured into nine distinctive sections offering:

- 1) An overview of the provincial press industry in the UK
- 2) An outline analysis of the Trinity Mirror Group
- 3) An overview of the Trinity Mirror Group in Wales
- 4) A presentation and assessment of Trinity Mirror's online strategies since 2000
- 5) An assessment of recent developments in UK regional and local online journalism (2006-7), with case studies of Johnston Press and the *Lancashire Evening Post*
- 6) An outline of Trinity Mirror Online Strategy (2006-7)
- 7) Consideration of staff responses to the proposed multimedia strategy at Western Mail and Echo
- 8) Assessments of the success of Trinity Mirror's pilot digital newsrooms in Merseyside, Newcastle and Middlesbrough
- 9) An assessment of the move to multimedia local and regional news provision in the UK, and a consideration of the "investing in journalism" strategy.

1 Local and Regional Newspapers in the UK

This chapter offers an overview of the state of the local and regional press in the UK examining ownership, circulation and readership, levels of profitability, staffing levels, journalists' pay and working conditions, and the development of the free regional daily press.

1.1 Broad Managerial Strategy

Local and regional newspapers in the UK present a paradox. On the one hand, local papers are very successful business enterprises. Regional and local newspapers attract more than £3 billion in advertising revenues, account for almost half (49%) of UK classified advertising and constitute the UK's largest print advertising medium. 3,764 local newspapers are sold every minute in the UK with 67.4 million copies of regional newspapers sold (37.8 million) or distributed free (29.6 million) every week. UK residents spend £690 millions each year on regional and local newspapers (Newspaper Society 2007). **Profits are considerable and expansive, while profit margins (measured as a percentage of turnover) are legendarily high and explain the enthusiasm of groups like Johnston Press for buying newspapers, which in turn feeds consolidation within the industry** (Mintel 2005).

These high levels of profitability have been sustained in the face of the genuine and long term decline in sales, by buoyant advertising revenues and a management strategy of cost cutting. Squaring this circle has long been identified as the core requirement of management. One observer claimed back in 1999, that the key task of the publisher "during the next ten years was to keep profit margins high while managing the steady decline of his newspaper's circulation base" (Cited in Crosbie 2004). This strategy has reduced the number of journalists employed on regional newspapers, kept their wages low and impacted on their news gathering and reporting practices in ways which have shifted editorial priorities, favoured a growth in lifestyle journalism and entertainment led copy and diminished the range and quality of editorial in provincial newspapers. These editorial changes provide some cause for concern and constitute the other dimension to the paradox of the regional press. While local newspapers remain a highly profitable business success, their editorial staffs and editorial content are under considerable challenge reflecting directly this managerial strategy.

The UK local press enjoys a distinguished record of local journalism. A move to complement the printed edition (the core business of the group) with additional online products, may or may not be desirable, but unless such a strategy is well conceived, resourced and implemented, it risks exacerbating the damaging consequences of the existing managerial strategy. Any prospect that the implementation of such a strategy might have opportunity costs which diminish the resource base available to produce the print editions of newspapers, would undoubtedly be damaging to the number of editorial jobs, the character and quality of the printed newspaper product, and the circulations such newspapers might be expected to achieve.

1.2 Titles and Circulations.

In 2007 there were 1,303 local newspapers circulating in the UK including 106 dailies (96 paid and ten free), 19 Sunday papers (11 paid and eight free), 528 paid weekly titles and 650 free weekly papers. 800 local and regional newspapers have an online website presence in 2007 (Newspaper Society 2007). Longitudinal comparison with equivalent figures for 1985 reveals an aggregate loss of 384 (23%) titles across two decades, but Table 1 reveals that the last ten years, have been a period of virtual stasis in the number of newspapers published. More significantly, the period since 1995 has witnessed the revival of weekly paid papers to their highest level since 1988 (548 titles), the continued decline of weekly free newspapers to their lowest number since 1995 (713), as well as the emergence of free Sunday and the successful free morning *Metro* titles (Newspaper Society 2005, 1995 and 1985).

Table 1.1: *Local Newspapers: Declining number of titles 1985-2005*

Newspaper Type	1985	1995	2005
Morning (paid)	18	17	19
(free)	-	-	8
Evening	73	72	75
Weekly Paid	749	473	526
Weekly Free	843	713	637
Sunday (paid)	4	9	12
(free)	-	-	9
Total	1687	1284	1286

Source: *Newspaper Society database 1985, 1995 and 2005*

Circulation figures have fared less well and signal that fewer people are reading local newspapers. At their peak in 1989, almost 48 million local newspapers (47, 870,000) were sold each week, but by 2004 this figure reduced to 41 million: a decline of 15%. Free papers have similarly declined from 42 million copies (1989) to 29 million copies distributed weekly in 2004: a drop of 28.6% even when the 4.5 million weekly copies of the *Metro*, *Standard Lite* and *MEN Lite* are included. There is some comfort in the 4% growth in weekly paid sales (Mintel 2005) reflecting the expansive number of paid weekly titles.

But in 2004, ABC data recorded an increase in circulation for only seven of the 75 listed evening papers; a year later, eighteen of the 20 best selling evening titles registered a decline. Similar trends are evident in the morning newspaper market with only four of the twenty best selling papers resisting decline. Six of the ten largest Sundays by circulation experienced decline (-12.8% at the *Sunday Mercury*) and even three of the eight new *Metro* titles registered falling distributions (Newspaper Society 2005).

The dramatic circulation decline confronting some titles becomes more evident in longer term comparisons (See Table 2). There are some striking figures here. Since 1995, the *Birmingham Evening Mail* has lost 53.7% of its circulation, the *Sheffield Star* 37.8%, the *Yorkshire Evening Post* 36% and the *Leicester Mercury* 30.7%. The figures for morning titles are less dramatic but catalogue severe downturns across the

period of 49.2% at the *Birmingham Post*, 33.8% at the *Newcastle Journal*, 28% at the *Western Mail* and 27.1% at the *Yorkshire Post*. Significantly, Table 2 reveals that for 17 of the 20 titles, the decline in circulation has been greater in the more recent period since 1995: the pace of circulation decline is increasing.

Table 1.2: Circulation of Selected Evening and Morning Titles 1995-2005

(Figures in brackets in the 2000 column represent circulation decline between 1995 and 2000 expressed as a percentage. Bracketed figures in the column 2005 represent percentage circulation declines for the period 2000 to 2005).

Newspaper Title (Evening)	Circulation		
	1995	2000	2005
Wolverhampton Express and Star	212,739	186,042 (-12.6%)	158,130 (-15%)
<i>Manchester Evening News</i>	193,063	176,051 (-8.8%)	144,201 (-18.1%)
<i>Liverpool Echo</i>	168,748	155,848 (-7.6%)	130,145 (-16.5%)
<i>Belfast Telegraph</i>	136,714	114,961 (-15.9%)	96,299 (-16.2%)
<i>Birmingham Evening Mail</i>	201,476	136,743 (-32.1%)	93,339 (-31.7%)
<i>Glasgow Evening Times</i>	138,987	106,839 (-23.1%)	92,088 (-13.8%)
<i>Newcastle Evening Chronicle</i>	120,604	107,346 (-11%)	91,703 (-14.6%)
<i>Leicester Mercury</i>	118,594	111,652 (-5.9%)	82,232 (-26.3%)
<i>Yorkshire Evening Post</i>	106,794	100,794 (-5.6%)	68,767 (-31.8%)
<i>Sheffield Star</i>	100,971	84,327 (-16.3%)	62,850 (-25.5%)
Newspaper Title (Morning)			
Aberdeen Press and Journal	108,963	101,642 (-6.7%)	86,942 (-14.5%)
<i>Norwich Eastern Daily Press</i>	79,596	76,579 (-3.8%)	68,599 (-10.4)
<i>The Northern Echo</i>	77,425	66,032 (-14.7%)	55,979 (-15.2%)
<i>Yorkshire Post</i>	79,094	76,424 (-3.4%)	50,541 (-33.9%)
Western Daily Press	62,692	52,373 (-14.8%)	45,115 (-13.9%)
<i>Western Mail</i>	64,602	55,273 (-14.4%)	42,981 (-22.2%)
<i>Western Morning News</i>	52,123	51,596 (-1.0%)	42,325 (-18%)
<i>East Anglian Daily Times</i>	49,217	44,755 (-9.1%)	38,538 (-13.9%)
<i>Newcastle Journal</i>	57,677	50,295 (-12.8%)	38,187 (-24.1%)
<i>Ulster Newsletter</i>	33,233	33,435 (+0.6%)	26,270 (-21.4%)
<i>Birmingham Post</i>	28,054	20,922 (-25.4%)	14,256 (-31.9%)

Source: ABC and VFD data from the Newspaper Society website.

1.3 Ownership

The ownership of the provincial press industry is highly concentrated in a handful of regionally based monopolies across the UK. Competition is fierce and companies tend to defend aggressively any incursions into their “territory” by other large newspaper groups. The process of consolidation, which has generated this monopoly structure, has been rapid but particularly marked across the last decade (See Appendix B and Williams 2006).

£7.3 billion has been spent on mergers and acquisitions since 1995 (Newspaper Society 2007). In 1996, ownership of one third of all regional newspaper companies changed hands (Franklin and Murphy 1998). In December 2002, Newsquest acquired the *Glasgow Herald*, the *Glasgow Evening Times* and the *Sunday Herald* for £216 million, following its earlier purchase of the Newscom group in May 2000 for £444 millions, adding titles with circulations of 499,550 to its holdings.

Johnston Press has superseded Newsquest as the most acquisitive of groups. In March 2002, for example, Johnston purchased Regional Independent Media’s (RIM) 53 titles

with aggregate circulations of 1,602,522. In the last six months of 2005, Johnston spent more than £500 millions buying local papers. The spending spree began when Johnston bought Scottish Radio Holdings 35 titles for £155 million (August) and the Leinster Leader group for £95 millions and the Local Press Group (£65 million), which includes the prestigious *Belfast News Letter* (September). Christmas seems to be a favoured time for acquiring companies. In December 2005, Johnston bought Scotsman publications from the Barclay brothers, a group that includes the *Scotsman*, *Scotland on Sunday* and the *Edinburgh Evening News*. On the day Johnston bought Scotsman Publications, Northcliffe placed 110 of its local titles (valued between £1.2 and £1.5 billions) on the market but withdrew them in February 2006 when they failed to reach the anticipated price. In December 2006, Sly Bailey announced the sale of a number of Trinity Mirror titles including the national title the *Racing Post*, along with regional titles in the Midlands, London and the South East including the *Birmingham Post* and the *London Press*; in the context of Northcliffe's collapsed sale, most pundits believe the portfolio of titles will struggle to achieve a favourable sale price. Kim Fletcher posed the question in the title of his piece for *Media Guardian*: "Who Would Want to Buy Trinity Mirror?" (Fletcher 27 November 2006).

One consequence of this merger activity has been a marked reduction of the 200 companies publishing local newspapers in 1992, to 137 by 1998 and to 87 by 2005. But while 38 of these publishing companies own a single newspaper in 2007 (down from 43 in 2005), **the 'big ten' groups own 74% of all local newspapers and account for 87% of weekly circulation.** The largest 20 groups own 89% of regional titles and control 976% of the weekly circulation (See Appendix C). Takeovers and mergers remain a constant feature of the industry. Between 1995 and 2005, for example, the *Yorkshire Post* had experienced "four owners in ten years. In the 240 years before that, it essentially had just one other owner" (Silver 17th October 2005).

This consolidation of the industry into large regionally based monopolies offers the prospect for substantive economies of scale and cost efficient operation, but this offers only partial account of the high profitability of the provincial press companies. The effective monopoly in local advertising which local newspapers enjoy, along with the ability of the industry to minimise production costs by keeping labour costs low are equally significant (Dear January 2nd 2006).

1.4 Advertising and Revenues

Most regional and local newspapers enjoy a virtual advertising monopoly in their circulation area, which is central to their ability to "square the circle" of declining sales and sustaining (if not expanding) profitability. As one senior journalist at a Trinity Mirror paper explained:

advertisers in our area advertise in our paper or they don't advertise at all. And that's the point. We've cornered the market in terms of advertising, unless they go on the television or the radio, which clearly isn't feasible for local people.

But this monopoly is being seriously eroded as advertising revenues increasingly migrate online, reflecting the presence of web-based classified advertising sites such

as *Craigslist*, online auction sites such as *Ebay* where ‘bidders’ can buy everything from a used car to tickets for a Madonna concert, alongside the growing tendency for large scale public sector organisations such as local authorities the Health Service and central government, to place job advertisements on their own web sites rather than paying to advertise in the classified pages of the local press.

The provincial press is meeting the web challenge to its advertising revenues by establishing its own online advertising presence offering readers classified ad sections, entertainment listings, and opportunities to post family announcements. *Fish4* is a searchable database of regional advertising established by four regional newspaper groups – Newsquest, Trinity Mirror, Northcliffe and Guardian Media Group Regional Newspapers – to provide an online market place for readers seeking Homes (*Fish4Homes*), cars (*Fish4Cars*) or employment opportunities (*Fish4Jobs*).

Despite these efforts, regional press advertising revenues fell from £3.166 billion in 2004 to £3.027 billion in 2005 (4.4% down); the first fall in revenues for 14 years (Advertising Association cited in Newspaper Society 2007). But the regional press remains the second largest advertiser (behind television) with 18.6% of aggregate media advertising revenues. Television’s share of advertising was also reduced from 26% in 2004 to 25.4% in 2005 along with the share enjoyed by national newspapers (from 13% to 11.9%), magazines (13 to 11.7%) and radio (4% to 3.2%) following television. Only the internet increased its share of advertising revenues in 2005; revenues doubled from 4% to 8.5% across the year. Regional newspapers, of course, enjoy a substantial and increasing online presence with the Newspaper Society recording 800 regional press websites and a considerable increase in online recruitment advertising: a growth of 26.9% from £32.7 million in 2004 to £41.5 million in 2005 (Newspaper Society 2007)

Local newspapers, however, remain the only medium to increase advertising expenditure year on year for more than a decade: from £1,963 millions in 1995 to £2,762 millions in 2000 and more than £3 billions by 2004 (Newspaper Society). Perhaps unsurprisingly, the recent report by Mintel (Mintel 2005) concludes that “future prospects for the UK regional press sector... remain good” with “real growth opportunities” which provide “grounds for confidence in a healthy future for the sector” (Mintel 2005).

But it is not only the high levels of advertising revenues which are significant to local newspapers’ business success. Equally important is advertisings’ contribution to overall revenues which amounts to a striking 80% of local newspapers’ overall income compared to approximately 46% for national papers (Mintel 2005). This sustained income from advertising revenues is the key to the profitability of the local press. In 2003, Trinity Mirror, the largest group, returned a profit in its lucrative regional newspaper division of £123.9 millions on a turnover of £525 millions: a profit margin of 24% which has increased to more than 38% in 2005/6. Johnston typically leads the profitability tables, although figures “between 25% and 30%” are typical “for many local newspaper companies” (Dear January 2nd 2006). These are exceptionally high rates of return compared to other industries. The average rate of return for national newspapers for example across the last decade (since 1995) has been less than 8%.

In part, these expansive profits reflect conglomerate local newspaper groups' access to economies of scale – such as printing and sub editing local newspapers at central sites within a group's 'territory'. But the mainstay of current managerial strategies to sustain profitability, is the relentless downward pressure on the number of journalists employed and their salaries/wages.

1.5 Salaries and Staffing

Journalists' wages are poor across the career range: from trainee to senior journalist. In 2003, NUJ members at Newsquest Bradford, struck in protest at pay scales of £17,000 for senior journalists at the *Telegraph and Argus* and £15,000 for the weekly papers: trainee journalists earn an average £12000 per annum (*Press Gazette* 11 July 2003). Half of British journalists earn less than the national average wage of £26,161 (Greenslade December 6th 2004); 50% of journalists working in the regional press earn less than £20,000 a year (Pondsford November 23rd 2006). Journalists are allegedly leaving the industry, because "they can earn more money serving behind a bar than in journalism" (General Secretary of the NUJ). Local journalists lobbied the October 2005 meeting of the Society of Editors about low pay (Silver 17th October 2005).

Table 1.3 signals the remarkably low level of pay offered to new entrants to journalism, who will typically be graduates and may have completed a one year postgraduate qualification in journalism training. **The rates vary between different companies and newspaper titles reflecting the local character of pay settlements: at Trinity Mirror Wales the entry salary is £11,113. Not only are journalists' salaries low, they compare poorly with entry level pay for comparable professions in the education and social welfare fields.**

Table 1.3: Entry Level Salaries for Trainee Journalists at Selected Titles

Employer/Title	Trainee Salary
<i>Birmingham Post and Mail</i>	£12000
<i>Bolton Evening News</i>	£12429
<i>Carlisle News and Star</i>	£13239
<i>Coventry Evening Telegraph</i>	£12641
<i>Dewsbury Reporter</i>	£12102
<i>Manchester Evening News</i>	£15833.20
<i>Rotherham Advertiser</i>	£15496
<i>Wakefield Express</i>	£12102
<i>Yorkshire Post</i>	£16440

Source: NUJ Data

Job cuts and non-replacement of staff provide a long term complement to the low wage strategy intended to reduce production costs. The Chief Sub editor at the *Yorkshire Post*, for example, explains the changes at the paper since he began working there in 1977. "Two features sub-editors producing 25 pages a week" had been replaced by seven subs, but they were required "to produce 180 pages... bottom lines have become more vivid," he observed, "it was a different era then" (Martinson June 14th 2005). The same processes are at work in the national press. A study conducted at Cardiff University School of Journalism, for example, revealed that

while the number of journalists employed on the national broadsheet newspapers has remained relatively constant across the last 20 years (approx 740 in 2004 compared to 780 in 1985), the amount of editorial pagination has tripled in some newsrooms (Lewis, J. Williams, A. Franklin, B., Thomas, J. and Mosdell N. 2006). To underscore the reduction in staffing, a recent front-page lead in *Press Gazette* posed the question, “How Many Journalists Do you Need to Run A National Newspaper? A: 16 (If your name is Richard Desmond)”. This is the number of journalists Desmond calculates he needs to employ to produce the *Sunday Express* (Pondsford 17th November 2006).

Group unwillingness to replace even the most senior staff is a common problem for editors. A journalist at Trinity Mirror complained:

At the moment there is a freeze on recruitment, but the freeze eventually slides into non-replacement and once again it’s a ratchet effect. If you don’t get a replacement quickly, you don’t get it at all. If you slip into the next quarter, they say “you’ve got along this far, why can’t you continue? You’re still bringing a paper out. If I give you eighteen grand for a new reporter, how many more papers is that going to sell? None at all, so why would I want to do that?”

The NUJ argues that the strategy of cost cutting by offering low wages, cuts and non replacement of staff, triggers a “spiral of decline” in which you “end up with fewer page changes, fewer editions, less localised coverage and, inevitably lower sales” (Dear 2nd January 2006). And the circle is complete. Another consequence of this climate of cuts and low wages is that bullying within the industry is rife. A recent study revealed almost a third (31%) of journalists reporting bullying by managers. “We get bullying in terms of people being expected to work beyond their normal hours” the report claimed “The culture is often that if you voice your concern, that’s frowned upon. You’re seen as weak” (Pondsford 23rd November 2006).

1.6 Editorial Content and Non Journalistic Sources

Job cuts offer short term savings but also reduce newspapers’ journalistic resources; fewer journalists must fill the editorial pages of the local paper. Consequently, journalists become increasingly reliant for their stories on rewriting the press releases issued by local government (Harrison 2006), the Central Office of Information (Garner 2006) and a host of public and private sector local lobbying organisations; alternatively, they increasingly rework copy from press agencies like the Press Association (PA) to fill the editorial gaps (Hamer 2000 and 2006). The independence of local journalism is less evident than a decade ago. Journalism has become an office job.

Local newspapers’ reliance on local government press officers for news about local civic and political affairs is well established with Harrison suggesting, with a discernible irony, that journalists’ dependence on “the carefully prepared material provided by professional local government PROs” has become “so extensive” that “the town hall is becoming the last bastion of good municipal journalism” (Harrison 1998, p.168).

But it is local newspapers' expansive use of PA copy which makes good the shortfall in staff journalists. "Outsourcing" news gathering is flexible and cost effective; "by default, PA has become the UK's monopoly reporter" (Aspinall 2005, p.2). The PA's output is certainly prolific: half a million words a day on news, sport, foreign, and business news and weather (Hamer 2000, p.12). The PA supplies camera-ready pages with text and statistical information for most regional newspapers. Costs reflect whether the content required is general (shared with other papers), or "bespoke"; i.e. uniquely requested by a particular newspaper. **Acknowledging this editorial reliance on PA copy, journalist Martin Wainwright's declared the PA to be "the new heart of British journalism"** (Wainwright September 20th 2005).

Another editorial consequence of newspaper groups' ambitions to win increased circulations and readerships, has been the shift to a tabloid format since the mid 1990s, complemented by an increasingly tabloid content. A greater editorial emphasis on entertainment, consumer items and crime, along with a preference for human interest stories is evident in a higher story count, shorter, 'frothier' stories and a changed layout and page design which features splash headlines, more pictures and a greater use of colour (See Appendix D and Franklin 2005).

Many journalists acknowledge that they are no longer engaged in the critical or investigative journalism which earned the local press the title of "local watchdog". Contemporary journalists working in under staffed newsrooms on under resourced local newspapers are unable to undertake such time and cost expensive journalism. The editor of one local newspaper is highly sceptical about the compatibility of newspaper groups' strategy to secure profitability and the prospects for a quality local journalism.

Sometimes a regional paper would have a two-man investigation team that may throw up only a single story in two months, but it would be a belter. No regional papers are doing that now... they've just crashed that down and reporters are just re-writing press releases... There's also the actual size of the newsroom... you've got fewer reporters plus an emphasis on the *number* of stories, not *quality* of stories. So all you've got is people on the end of the phone re-writing press releases. They're not actually out there connecting with the community... **So fewer reporters expected to fill bigger and bigger newspapers with fewer journalists, less training and smaller salaries. So we're not doing the job that regional newspapers used to do. We're not going out and challenging people like the police and the local council. All we're doing, and I hesitate to say this, but all we're doing is just trying to keep circulation up as a horse for advertising. This is ultimately my great fear, that eventually we stop being a newspaper and become just a medium to carry advertising.**

1.7 The Free *Metro* Daily Press

The free weekly newspaper “revolution” occurred during the 1980s. The number of titles expanded at a considerable pace, from 325 in 1980 to a peak of 882 titles in 1986. Distribution expanded at a similarly striking rate from 15 million copies in 1981 to a peak of 42 million copies by 1989 (Franklin 1998, p.128). The free newspaper business was booming. Growth in advertising revenues matched distribution, rising from a meagre £2 million in 1970, which represented a modest 1.4% share of the total provincial newspaper advertising market to £84 million (13.1 %) by 1980 and £263 million (26.2 %) by 1985; a doubling of market share in five years. In the 1990s, this growth experienced a reversal but free weekly newspapers remain significant because of the large number of titles, their substantial distribution figures and the considerable advertising revenues they deliver (Franklin 2006 and Mintel 2005). In 2007, 650 free titles are published.

Journalists were typically dismissive of the “freesheets” considering them as “thin on news” and more concerned to defend the group’s paid titles than offer a serious news service. As Peter Preston expressed it, these papers have “more to do with business than journalism” (Preston September 14th 2003).

By the turn of the millennium, the emergence of a new style of *daily* free newspaper targeted at young, urban, commuter readers has enjoyed a striking initial success with some of the “new breed’s cheerleaders” arguing that these new *Metro* or *Lite* newspapers might not only reverse the declining fortune of free newspapers, but provide a model for “the future of print journalism” (Berry 2005, p55).

Associated’s *Metro* series of daily papers was the first to be launched in London in March 1999 with a print run of 80,000 copies distributed via bus, railway and tube stations throughout the capital; by 2005, the London *Metro* was printing 496,724 copies daily (Newspaper Society 2005). Associated quickly rolled out other regional editions in the Midlands, Scotland, the North West, Yorkshire and the South West and in March 2006 in South Wales and Liverpool. The aggregate circulation of the current *Metro* papers is 1,240 copies prompting supporters to claim “the fourth largest circulation in the country” for the *Metro* just behind the *Sun*, *Daily Mail* and *Mirror* (Meeke March 4th 2005). According to its website, the *Metro* provides a “20 minute informative and entertaining read” for its target readership of “young, affluent, urban commuters” and reaches 1.8 million readers daily of whom “67% are ABC1 and 74% are under 45 years old” (http://cws.huginonline.com/M/132142/PR/200510/1014769_5.html). The success of the *Metro* has inevitably attracted other titles into the free market: *The London Lite*, *the London Paper*, *the MEN Lite* and the *FTpm*.

Apparently different, the new *Lite* editions resemble their weekly predecessors in key respects. First, their rationale derives from business rather than journalistic concerns; they exist to buttress declining readerships for the paid paper and sustain advertising revenues. Consequently, they are also very journalist ‘lite’. Associated judged that 35 journalists was sufficient to staff the first London *Metro* in 1999 while the paid for *Evening Standard* employed 250 journalists (Berry 2005, p57); the Editor has only six news journalists based at the London *Metro* and four in Manchester office (Morgan January 12th 2001). These meagre numbers of journalists have clear implications for newsgathering practices. The editor is quite explicit; at the *Metro*, journalism is a

desk-based job for a new generation of journalists. And fewer of them! Journalists “work on the phone and on screen” (Jotinsky cited in Berry 2005). Roy Greenslade describes the new FUN (Free Urban Newspapers!) as a “travesty of journalism” (Cited in Barkham 22nd September 2006).

2 Trinity Mirror Plc

This chapter outlines the economic history of Trinity Mirror, giving an overview of revenue, profit and staffing levels at the group, as well as looking at falling newspaper circulation.

Formed in 1999 following Trinity Plc's acquisition of the Mirror Group Plc, Trinity Mirror is the UK's largest newspaper publisher, with 240 local and regional papers, five national papers (including the *People* and *Mirror* titles), four sports titles (the most successful of which is the *Racing Post*), as well as over 300 websites in the corporate portfolio. Regional and national titles are underperforming compared with the national average, with sales and circulations continuing to decline. Despite these circulation falls, Trinity Mirror has enjoyed substantial growth in profits reflecting sustained and high advertising revenue derived from its local and regional newspapers and the company's policy of sustained cost-cutting.

A former Trinity Mirror editorial employee from the North East of England reported that after years of service with, and close observation of the company he had decided that their managerial strategy:

reflects a quote of Rupert Murdoch's from some time ago, that the future of newspapers should **be a long, slow, managed, profitable decline**. The loss of circulation is seen as an inevitability but you should make as much money out of it as you can while the going's still relatively good.

A senior academic with 20 years' experience in the newspaper business told us:

Sly Bailey's not thinking five to ten years ahead. She'll be amazed if she's in the job in three years' time. And the only way she's going to stay there is to provide huge increases in profits for the shareholders. And that's not some pseudo-Marxist theory; any straightforward stockbroker would tell you the same thing.

Table 2.1: Trinity Mirror Plc Financial Performance and Staff Numbers, 1999-2006

Year	Pre-tax profits (000s)*	Turnover (000s)	Profit Margin (%)	Total employees	Production and editorial	Sales and Distribution	Admin
2005	209,500	1,122,000	18.67	11,065	5,575	3,813	1,677
2004	216,800	1,141,700	18.99	11,151	6,039	3,529	1,583
2003	172,500	1,095,100	15.75	12,159	6,239	4,071	1,849
2002	155,500	1,092,200	14.24	11,458	6,149	3,505	1,804
2001	155,500	1,131,100	13.75	12,187	6,424	3,792	1,971
2000	154,100	1,080,300	14.26	13,002	6,898	3,826	2,278

1999	116,000	596,800	19.46	8,079	4,018	2,531	1,530
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Source: Western Mail and Echo Ltd. annual accounts. Figures for pre-tax profits are before exceptional items.

Table 2.1 reveals a number of significant economic trends at the company since its establishment in 1999. Apart from a slight recent drop in pre-tax profits (largely attributable to poor advertising revenue at the national titles), there has been a steep rise in profitability, with profit margins (measured as a percentage of turnover) increasing substantially since 2000. Concurrent with this rise in profits, has been a sharp decrease in the size of the workforce. In 2002, for example, the then chief executive Philip Graf announced a phased cost-cutting strategy that would involve the loss of 800 jobs over a two year period, while his successor Sly Bailey cut an additional 550 posts on her arrival in 2003. Between 2000 and 2005 the company shed 15% of its employees. Job losses have been particularly high in the editorial and production sector, where there are now an average of 1,323 less printers and journalists than there were five years ago (a fall of almost 20%).

Increased profits and job cuts have been accompanied by marked falls in newspaper circulation figures.

Table 2.2: Circulation at Trinity Mirror's Flagship Titles, 1999-2006

Year	<i>Liverpool Echo</i> *	<i>Daily Mirror</i> **
2006	117,967	1,549,573
2005	123,584	1,717,000
2004	129,691	1,777,000
2003	131,349	1,940,000
2002	145,227	2,104,000
2001	150,940	2,188,000
2000	151,229	2,244,274
1999	155,920	2,314,000

Source: Trinity Mirror Plc annual accounts and ABC. Average annual ABC figures for respective years except 2006, which lists most recent monthly ABC average circulation

The extent of the circulation malaise for the company is evident from a brief comparison of circulation data for two of Trinity's leading titles: the *Liverpool Echo* one of its best-selling regional evening newspapers, and the *Daily Mirror*, its flagship national publication. In 2000 the *Echo* achieved an average daily circulation of 151,229 (Trinity Mirror Plc 2000), but by 2003 this had dropped to an average of 131,341 (Trinity Mirror Plc 2003). The most recent authoritative figures put the average daily circulation at 117,967, signalling the dramatic loss of 21% of the newspaper's readership in just five years (ABC July 2006). Rates of decline at the national titles have been even steeper. In 2000 the company's flagship national newspaper the *Daily Mirror's* average daily circulation was 2,244,274 (Trinity Mirror Plc 2000), by 2003 this had slumped to 1,940,000. The Audit Bureau of Circulation's latest figures for the *Mirror* show a further reduction to 1,549,573 copies daily marking a circulation decrease of almost one third (ABC December 2006).

Table 2.3 shows, however, that despite these falls in newspaper sales, the company has sustained circulation revenues over the period by regular increases in cover prices,

and selling the vast majority of its newspapers at the full rate rather than at discounted bulk rates.

Table 2.3: Trinity Mirror Revenue Breakdown, 1999-2006

Year	Advertising (£ 000s)	Circulation (£ 000s)	Other (£ 000s)	Total (£ 000s)
2005	611,700	396,400	113,900	1,122,000
2004	644,400	395,400	101,900	1,141,700
2003	620,600	376,000	98,500	1,095,100
2002	618,200	373,300	100,700	1,092,200
2001	634,100	393,700	103,300	1,131,100
2000	574,800	396,800	106,700	1,080,300
1999	332,000	173,600	90,200	596,800

Source: Western Mail and Echo Ltd. annual accounts

Copy sales, of course, are not the sole source of revenue. By far the biggest income generator for the company has been advertising which has increased steadily year on year except in 2002 and 2005. Alongside the company strategy of keeping staff costs to a minimum this has been a key factor in maintaining high profit margins.

2.1 Current and Future Business Plans

Concerned by the reduction in profits revealed in Table 2.1, Trinity Mirror initiated a business review in August 2006 that was conducted by the company with the aid of the investment bank N.M. Rothschild. In mid-December 2006 the results of the report were announced. To the surprise of many city and media analysts, instead of the expected full de-merger and a sell-off its national titles in order to concentrate more fully on its profitable regional sector, a compromise solution was announced that would involve the sale of some of Trinity’s regional newspapers along with its sports division.

The de-merger option was rejected for a number of reasons: firstly, the considerable deficit on the company’s pension fund would have had to be split, forcing Trinity to accelerate its payments to make up the shortfall; secondly, the group has investments in US bonds, and would have been penalised if it changed the structure of the company by having to redeem the bonds early; finally, separating the two businesses would mean a large increase in costs, as the national and regional newspaper operations share distribution, printing and procurement. Many city experts have warned that this compromise-plan is a sign of weakness, accusing Sly Bailey and other senior managers of dithering and delaying the “inevitable” sale of the company’s national titles.

The review instead outlines plans to sell its sports division (including the profitable title the *Racing Post*) along with approximately 100 local and regional newspapers in the Midlands, London, and the South-East of England (including *South London Press*, the *Birmingham Post* and the *Coventry Telegraph*). Trinity will concentrate on its national newspaper titles (such as the *Daily Mirror* and *Sunday Mirror*) its growing number of digital operations, and key regional titles in Scotland, northern England

and Wales. **Central to the review's business plan was a policy of maintaining healthy dividends for shareholders, continued "cost savings", and the adoption of a "technology led operating model across Group" which it hopes will drive profits up and provide it with more of a foothold in the online advertising sector** (Trinity Mirror 14th December 2006).

It is hoped that the sales will take place in the second or third quarter of 2007 "subject to it receiving full and attractive offers for each of the businesses to be sold". Chief executive Sly Bailey has refused to comment on whether Trinity Mirror's new business plan will result in further job losses.

3 Trinity Mirror in Wales

This chapter offers an overview of the state of Trinity Mirror's operations in Wales. It examines the company's domination of the Welsh regional and local newspaper market, managerial strategy, circulation and readership, levels of profitability, staffing levels, journalists' pay and working conditions, and the impact of the introduction of the Metro in Cardiff. The chapter draws its data from company annual accounts and other official documents, semi-structured interviews with media workers, and a survey of opinion of Western Mail and Echo employees.

3.1 Managerial Strategy

Trinity Mirror subscribes to a business strategy that aims to minimise costs and maximise profits. As a private limited company its main allegiances are to its shareholders, who have enjoyed high returns on their investments during a period of sustained profitability. Its very successful regional newspaper companies have been key to sustaining these high profits over the last seven years, and its Welsh titles have continued to perform very well as generators of advertising revenue.

Across the same period circulation and employees at Trinity's regional newspapers have suffered decline, and the experience of the Welsh titles is unexceptional. Not only are circulation figures for the Welsh dailies plummeting, but staffing levels (including numbers of editorial staff) continue to fall.

One Western Mail and Echo insider claimed that this company focus on shareholder value has had serious consequences for the continued investment needed to produce a quality newspaper:

We've seen so much of the same from Trinity Mirror over the years. I've been working for Trinity or its predecessor Thompson for 19 years, and over that time, particularly over the last six years or so I've seen resources cut down in editorial simply because as a plc you have to make more profit every year, and if you're not doing that through organic growth (like sales or advertising revenue) then you cut costs, usually labour costs.

Another employee suggests there is a disparity between the company's claims to provide quality news as well as healthy dividends, and the reality in the newsroom:

Wanting to minimise costs and maximise profits are irredeemably linked. Notions that existing management are committed to providing a news service in addition to making a success of their business is, well [...] I for one don't believe they tell the whole truth. They are interested in getting what they can out of the product, and the fact that the product is unique is neither here nor there. As one of

my colleagues is very fond of saying, **we could be a baked bean factory for all they care as long as we're making money.**

These comments suggest continued cost-cutting has resulted in a very disgruntled workforce. The employee went on to claim that:

A managerial philosophy of the kind we have here in Cardiff operates on the presumption that people's goodwill will tide things over. It's wing and a prayer time here. But in the current climate it would be wrong for people in positions of responsibility to assume that goodwill is an inexhaustible commodity. Judging from the feedback I get from colleagues in my newsroom, they are now seriously racked off.

3.2 Titles and Circulations

Trinity Mirror's presence in Wales is centred on two companies: the large, well established, and extremely profitable Western Mail and Echo Ltd. in South Wales; and the smaller Trinity Mirror North Wales Ltd. (which is a small subsidiary of Trinity Mirror North West & North Wales Ltd.).¹

Western Mail and Echo is by far the biggest news company in the region managing 15 newspaper titles (including the flagship morning *Western Mail*, the Cardiff evening newspaper the *South Wales Echo*, and the tabloid *Wales on Sunday*), as well as magazines, specialist publications, and the website *IC Wales*. Trinity Mirror North Wales' portfolio consists of one popular regional newspaper, the *Daily Post* (Welsh), the website *IC North Wales*, and a number of small local weekly publications.

Table 3.1: Trinity Mirror's Titles in Wales

Western Mail and Echo	Trinity Mirror North Wales
Daily Newspapers:	Daily Newspapers:
<i>Western Mail</i>	<i>The Daily Post (Wales)</i>
<i>South Wales Echo</i>	Weekly and free titles:
<i>Wales on Sunday</i>	<i>North Wales Weekly News</i>
Weekly and free titles:	<i>North Wales Weekly News Colwyn Bay Edition</i>
<i>Gwent Gazette</i>	<i>North Wales Weekly News Valley Edition</i>
<i>Merthyr Express Series</i>	<i>Abergele & St Asaph Visitor</i>
<i>Pontypridd & Llantrisant Observer</i>	<i>Caernarfon & Denbigh Herald (South)</i>
<i>Cynon Valley Leader</i>	<i>Caernarfon & Denbigh Herald (Arfon)</i>
<i>Rhondda Leader</i>	<i>Holyhead & Anglesey Mail</i>
<i>Glamorgan Gazette</i>	<i>Yr Herald</i>
<i>Post</i>	<i>Farm Trader</i>
<i>Post - Barry</i>	<i>Rhyl & Prestatyn Visitor</i>
<i>Post - Bridgend</i>	<i>Bangor & Anglesey Mail</i>

¹ Trinity Mirror North Wales has only been producing annual reports and accounts since 2004, so meaningful comparative data on the company's titles are not available. Before this date its accounts were bound up with the larger subsidiary Trinity Mirror North West. For this reason this report focuses much more on the current and historical situation at the company's larger more established (and more profitable) sister Western Mail and Echo Ltd.

<i>Neath & Port Talbot Guardian</i>	<i>Vale Advertiser</i>
<i>WM - The Women's Magazine</i>	

The *Western Mail* and the *Daily Post* ensure that Trinity dominates the regional newspaper market in Wales. The *Post*, produced in the newsroom at Llandudno Junction, and with small offices in Mold and on Anglesey, has a current average daily circulation of 39,651 in the north. Cardiff's *Western Mail* (despite calling itself 'the national newspaper of Wales') is a regional title covering the South with a circulation of 42,578 (ABC 2006). The company's many local evening and weekly newspapers, added to these regional monoliths, mean that (in 2005) Trinity Mirror could claim 42% of total newspaper circulation in Wales (Barlow et al, 2005, pp. 45-6, 49).

In line with the rest of the UK market, circulation figures have been in sustained decline at Trinity's Welsh daily titles. Across the last thirty years, **the *Western Mail* and the *South Wales Echo* have each lost more than half their readership.** The decline has been less marked at the *Daily Post*, but this newspaper has still lost more than a fifth of its circulation since 1997 (more complete data on ABC circulation figures at *Western Mail* and *Echo* can be found in Appendix E).

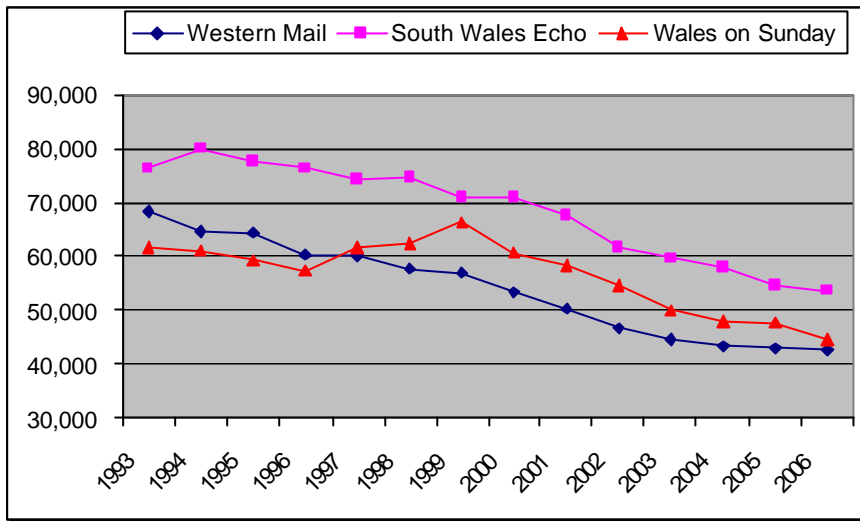
Table 3.2: *Falling Circulation at Trinity's Key Welsh Daily Titles Since 1979*

	1979	1997	2006
<i>Western Mail</i>	94,000	61,541	42,578
<i>Daily Post</i>	50,000	52,000	39,651
<i>South Wales Echo</i>	120,000	74,246	53,780

Source. Table adapted from Thomas 2005, and latest ABC circulation certificates

Circulation decline has accelerated across the last decade. Chart 1.1 indicates that circulation figures at the *Western Mail*, the *South Wales Echo*, and the *Wales on Sunday* have fallen markedly and continually since 1993.

Chart 3.1: Circulation at Western Mail and Echo Flagship Titles, 1993-2006



Source: ABC. Circulation figures are for period July -December every year apart from those for 2006, which represents the ABC audit period December-June

The scale of the decline at these newspapers is striking. The *Western Mail* has lost 38% of its readers since 1993, having fallen from a readership of 68,456 to 42,578; the *South Wales Echo* has lost an average of 22,672 readers in the same period, a drop of 30%. The *Wales on Sunday*'s readership figures tell a slightly different story. After initially falling from 61,675 average daily readers in 1993 to 57,379 in 1996, there was a brief comeback which saw it gradually increase to a pinnacle of 66,239 readers in the year 2000. Since then, however, its decrease in readership has matched that of its sister newspapers and has fallen by a third in only six years.

The circulation problem has grown so severe that there are suspicions amongst staff that senior Trinity Mirror managers in Wales are no longer worried about continued falling readership figures, and are being instructed to manage the inevitable decline in the print product as best they can. One *Western Mail* and *Echo* employee commented:

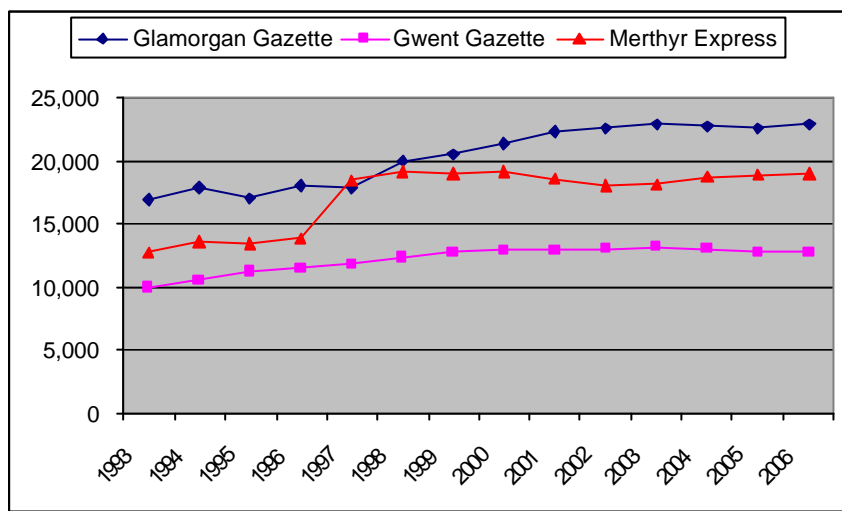
Whenever I speak to the editors on the subject of circulation, I am surprised, and indeed so are they, to learn that in discussions with senior management like the managing director here, as well as the advertising director and the rest of the senior management team, they don't talk about circulation very much at all. It used to be that editors would live and die by their circulation figures. It's almost like they've given up on it now. Like the expectation is that circulation is going to decline, we know it's going to go down, we expect it to decline, so let's not waste our breath and let's not try and fight battles we know we're not going to win.

According to this source, this is quite a recent development, and this change in the broader culture has taken the pressure off editors. He continued, "it used to be that you'd get the ABCs out and someone would be down 10% and the next week the editor would be gone to pursue a career as a freelancer or consultant or something, but that's all changed now".

It should be noted that since 2004 there has been a slow-down in the rate at which readers are abandoning the *Western Mail*. The period 2001-2003 saw an average circulation drop of almost 7000. In the next 3-year period, however, this had been reduced to less than 700. The re-launch of the newspaper in 2004 which saw its format change from broadsheet to tabloid (or ‘compact’) was a popular move, and clearly halted circulation decline. There are signs then, if not of a revival in the circulation of Trinity’s regional press in Wales, at least of a slow-down in its demise.

As is the case elsewhere in the UK weekly newspaper sector there is a lot more stability in the readership figures of Trinity’s weekly local titles, most of which have seen modest rises in circulation in the period 1993-2006.

Chart 3.2: *Circulation at Western Mail and Echo’s Weekly Titles, 1993-2006*



Source: ABC. Circulation figures are for period July-December every year apart from those for 2006, which represents the ABC audit period December-June

Circulation trends at the *Glamorgan Gazette*, the *Gwent Gazette*, and the *Merthyr Express* are representative of the performance of the group’s other local weeklies. As can be seen from Chart 3.2, readership of these titles has been consistently strong over the last 14 years, and even though they are nowhere near as lucrative as the daily and national titles, the increases in readership have been impressive. The *Merthyr Express*’s readership has grown by a third from 12,732 to 18,966; the *Gwent Gazette* now attracts a weekly average of 21% more readers than it did in 1993; and the *Glamorgan Gazette* has gained 26% on the 1993 readership, and attracts almost 6000 more readers. The circulation gains at these newspapers have been largely in line with increased circulation levels for the rest of the Celtic Weekly group. For the period January to June 1993 average weekly circulation for group was 65,088; this had increased to 97,628 by 2006, signalling an impressive rise in average circulation of around one third. These gains have not been the result of any significant investment by Western Mail and Echo. On the contrary, many of these operations are run on very overworked skeleton staffs. It is more likely that these figures attest to strong feelings of local identity in their target markets and a real interest in genuinely local news.

3.3 Advertising and Revenues

In common with other regional newspaper groups, falling circulations at Trinity Mirror in Wales have not translated into falling profits. In fact quite the opposite has occurred. **Despite the mixed fortunes of newspaper sales noted above, profits at Western Mail and Echo Ltd. have risen at an unprecedented rate.**

Table 3.3: Profitability at Western Mail and Echo

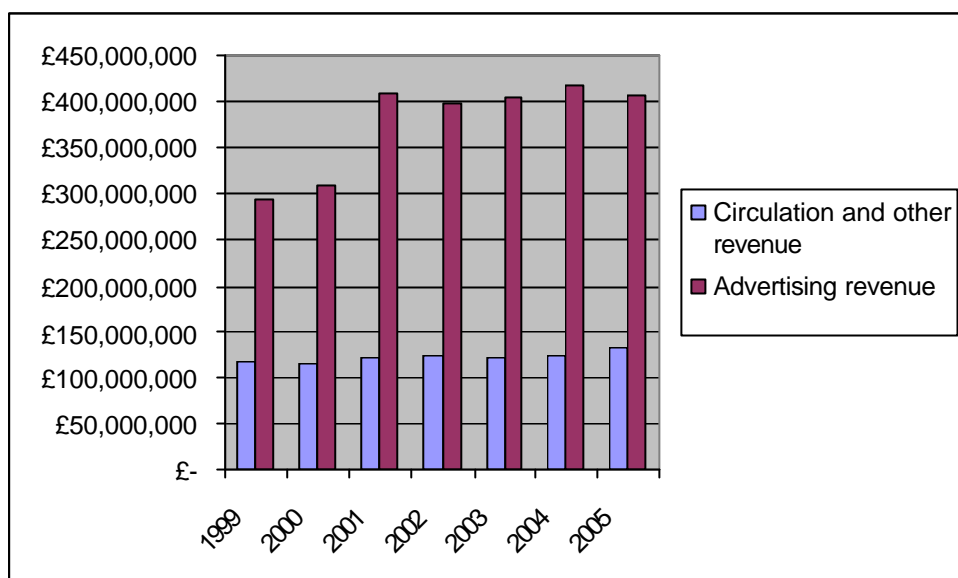
Year	Pre-tax profits (000s)	Turnover (000s)	Profit Margin (%)
2005	20,999	54,956	38.21%
2004	19,624	55,356	35.50%
2003	16,241	54,307	29.90%
2002	15,707	51,998	30.20%
2001	13,296	49,966	26.90%
2000	6,374	45,991	13.90%
1999	9,475	44,508	21.30%
1998	7,819	40,983	19.10%
1997	6,834	38,997	17.50%
1996	3,916	36,681	10.70%
1995	9,379	36,641	25.60%

Source: Table adapted from Thomas 2005, and Trinity Mirror's most recent annual accounts

In 2005 Trinity Mirror claimed that the *Western Mail* was the UK's "fastest growing regional daily" (Trinity Mirror Plc 2005). Given that most regional newspaper companies run a profit margin of between 25% and 35%, the *Western Mail's* recent margins place it well above average as one of the most profitable regional newspapers in the country. Indeed, **in a recent *Western Mail* supplement on Wales's top 300 companies, in terms of profit margins Western Mail and Echo Ltd. was ranked the 7th most profitable company of any kind in the principality.**

These huge profits are largely reflect the company's ability to attract advertising. Over 80% of all revenue at regional and local newspapers comes from advertising, and in spite of an industry-wide stagnation in advertising demand and growing competition from online specialists, the UK's regional newspapers are still faring considerably better than national newspapers in accruing advertising revenues (Mintel 2005). In this respect, Trinity's regional titles are no different.

Chart 3.3: Breakdown of Revenue Types at Trinity Mirror's Regional Division

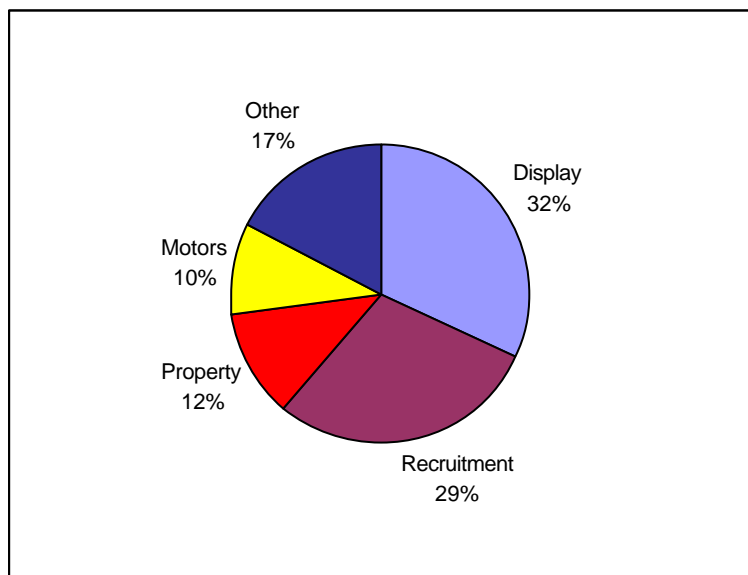


Source: Trinity Mirror Plc annual accounts

There are no figures available for advertising revenue for Trinity's Welsh titles alone, but these figures for the regional news division as a whole indicate just how important advertising is in driving profits. Since 1999 between 70% and 77% of all revenue received by the regional titles has been generated by advertising.

Given Western Mail and Echo Ltd.'s very high profit margins, and the fact that low circulation figures have been barely offset by incremental increases in cover price, it is safe to assume that the Welsh subsidiary's advertising revenues are as high, if not higher, than those of its parent company. Two key factors contribute to this. First, as the balance book shows, the company would clearly rather avoid losing advertisers than readers; and second, the lack of competitors in the regional press in Wales (North and South) means that Trinity enjoys a near advertising monopoly (Thomas 2005).

Chart 3.4: Breakdown of advertising types at Trinity Mirror's Regional Division (average figures 1999-2005)



Source: Trinity Mirror Plc annual accounts

Chart 3.4 shows that by far the largest amount of advertising revenue from Trinity's regional titles is generated by classifieds: 68% in all compared with 32% coming from display ads (again reflecting a typical pattern for the local and regional press). Of these classifieds, most advertise recruitment or situations vacant. The *Western Mail's* and the *Echo's* recruitment advertising revenues are boosted by the presence of very large employers like the National Assembly for Wales, which guarantees a steady stream of income.

It is widely recognised across the newspaper industry that this focus on chasing advertising revenue to generate revenues in the short-term, at the expense of investing in the future of newspapers, is damaging the ability of journalists to provide good quality local and regional news. One NUJ official summed up a contradiction at the heart of Trinity's operating practices:

On one level management is constantly preaching to us that times are hard and that advertising is difficult and so on. On the other you actually see the published figures relating to profit levels, which are incredibly high by anyone's standards. Back in the 1980s regional newspaper companies used to aspire to profit margins of around 10%, but here they're nearly four times as much as that and they're still not satisfied.

Another *Western Mail* and *Echo* employee complained that the Plc company structure adversely affected the quality of the news:

We have profit margins that most businesses would give their right arm for. If we were a family run, or a locally owned business, then

the attitude to the profitability would be entirely different. But because we're a plc, and because everything is done from a senior executive level, it is led by a feeling that they have to satisfy the city and the city investors. There's no thought to treating Western Mail and Echo as a Welsh business that actually looks to the needs of Wales, particularly post-devolution where so many of the stories we write really do have to come from local sources and are written by local journalists.

3.4 Staffing

Alongside falling circulation figures and extremely large (and growing) profit margins, there has been a steady decrease in the numbers of all staff at Western Mail and Echo Ltd.

Table 3.4: *Staffing Levels at Western Mail and Echo Ltd.*

Year	Total employees	Editorial and Production	Sales and Distribution	Admin
2005	643	481	87	75
2004	751	556	92	103
2003	826	599	103	124
2002	796	573	88	135
2001	821	594	91	136
2000	974	688	114	172
1999	990	692	127	171
1998	974	687	135	152
1997	920	657	114	149
1996	862	647	130	85
1995	799	612	82	105

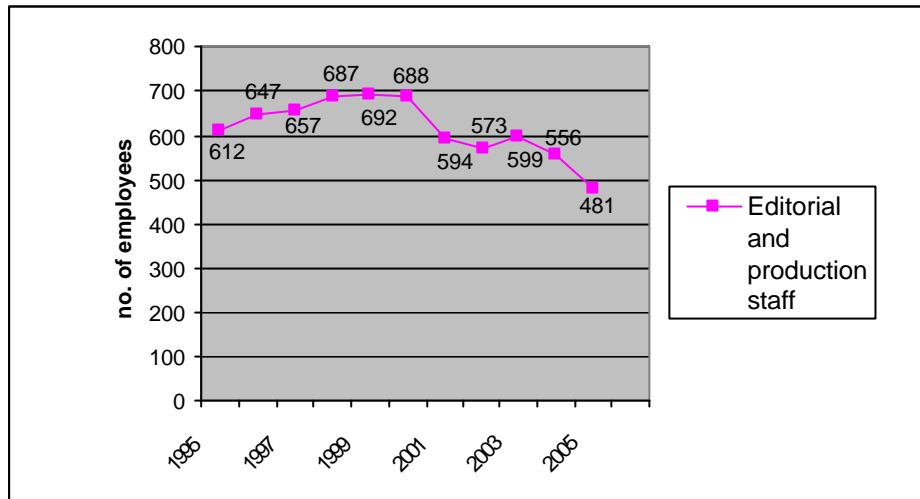
Source: Western Mail and Echo Ltd. annual accounts

Table 3.4 tells a clear story. After the Trinity Mirror merger employment rates changed notably. Since 1999 the company has shed almost 20% of its staff. Sales and distribution staffing levels have decreased by almost a third since the merger, a factor which goes some way to explaining falling circulation. The steep decline in admin staff should also not be overlooked as unimportant to the quality of the newspapers offered by the company. An almost 56% decrease in administrators since 1999 has meant that many of the tasks previously undertaken by non-editorial staff are now the responsibility of already overworked journalists. One reporter at the *South Wales Echo* said: "We now employ fewer administrative support staff, and those that we do employ work shorter hours, so lots of the work that used to be done by them is now done by journalists or it's not done at all."

Most worrying, however, is the decrease in the numbers of editorial and production workers. One *Western Mail* employee told us, "the impact [of the cuts] on staffing is the worst thing. We've had no investment in getting better quality by employing more people. It's hand to mouth, now, to be honest". Another told us how management relies on the goodwill of staff to pull together and put in the extra hours

needed to get the newspaper out. “People do work beyond their contracted hours just to get a good paper out. Despite all the cutbacks people still want to produce a quality job, and if that means staying on people do, and they put in a lot more commitment than the company deserves. But morale is very low at the moment”.

Chart 3.5: *Decreasing Editorial and Production Staff Numbers at Western Mail and Echo*



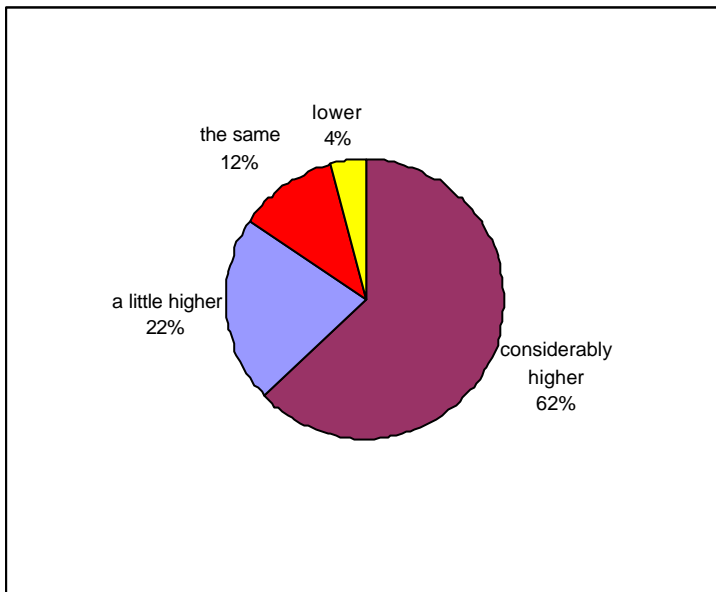
Source: Western Mail and Echo Ltd. annual accounts

The number of editorial staff that a newspaper company employs is a clear indicator of how seriously it takes the news product it offers the public. Chart 3.5 shows how an almost constant decline since 1999 has resulted in a 31% overall decrease in editorial and production staff. Some of this decrease can be explained by corporate restructuring, but even so the downward trend is very marked. **Every journalist at Western Mail and Echo that we contacted (along with many other from Trinity regional companies outside Wales) complained of decreasing editorial staff levels and non-replacement of colleagues that leave for other jobs or retire.**

For the purposes of this report we surveyed opinion among NUJ members of the Western Mail and Echo Trinity Mirror chapel, and 94% of respondents (48 out of 51) stated that they considered the number of editorial staff in their newsroom had decreased in recent years.² Only 6% of staff claimed that levels had remained the same, and not one thought that extra staff had been hired. The effects of falling staff numbers on workload were also clear from the survey.

² Surveys were sent to 130 members of the Western Mail and Echo NUJ Chapel. All percentages refer to proportions of the final sample of 51 survey respondents.

Chart 3.6: Survey: How has your workload changed since you started out as a journalist?



NB: Surveys were sent to 130 members of the Western Mail and Echo NUJ Chapel. All percentages refer to proportions of the final sample of 51 survey respondents.

84% thought that their workload had increased since they began working as a journalist; with 62% feeling the amount of work they did was “considerably higher” and 22% feeling it was “a little higher”. 12% of respondents claimed it had remained the same (a significant proportion of these respondents were new to the job however), while only 4% (just two journalists) said their workloads had decreased.

One local NUJ official told us:

Over the last ten years we’ve probably lost about a quarter of the reporting staff. Also there have been a couple of rounds of redundancies, one at the end of 2003 and the second at the end of 2005. On both occasions there were around 20 journalists that went company-wide. We managed to get situations where there were no compulsory redundancies, but there were people who were prepared to go voluntarily, but obviously that has an impact on our ability to produce the newspapers. Now we are really cut right to the bone with no spare capacity at all.

Another Cardiff staffer expanded on how the depleted workforce affects a journalist’s ability to their job well:

In the *Echo* newsroom the general reporters, the non-specialists, are all allocated a patch that is supposed to cover an area of metropolitan Cardiff. At the moment several of those patches are not covered, and of those that are nominally covered by people currently in the office – well, they might as well not be. The chances for them to get out and about, take an afternoon, take a day, wander round the patch,

talk to people, make yourself known, make introductions to the great and the good, get people to know your face? No chance, absolutely no chance. Once in a blue moon. And the bulk of anything they are able to do is done on the phone. We're desk jockeys, essentially.

Even supposedly basic tasks like getting to know your city and developing contacts are out of reach to reporters as they struggle to fill the newspaper. Another journalist told us:

The cuts have made the staffing situation a lot worse. Particularly in the last five to six years. To give you an example, today we've only got six head office reporters working. When everyone's in and we're at our full current strength there at 12 or 13. Five years back there were 19 or 20 of us. We used to have an investigations reporter who would take days to look at big exclusives, but not any more. We just haven't got the time and staff for that kind of work to be done now, as the paper's got to be filled every day and there just aren't enough staff here.

As well as having to contend with periodic redundancies, many talk of an unspoken policy of non-replacement and delayed replacement of staff at the Western Mail and Echo. Of those who responded to our survey, only 2% of staff claimed that colleagues who retired or left for other jobs were "always" replaced. 84% of staff claimed that colleagues were only "sometimes" replaced, and 14% felt that they were "never" replaced. One staff member explained the situation:

Staffing is a very topical issue at the moment. Inasmuch as at the end of this week there is a joint leaving party for four journalists. By coincidence they're all finishing on or around the same time, and I think our current level of unfilled vacancies is 4-5 on the news side alone. Non-replacement has been a rolling issue for a number of years. Most if not all of these positions are due to be filled, but it's a question of when they are filled. But we all know that there are occasions when salami-slicing happens and they leave something for a month or two and then that money gets held back.

Such "salami slicing" has become such a problem that **some fear the situation is close to breaking point:**

When we see people leaving, and nobody begrudges it, what we're interested in is how quickly bodies are going to be hired to replace them. Not just to ensure that those that are left aren't left with more to do, but to ensure that the paper is properly staffed in order to deliver the service it claims to be there for.

3.5 Salaries

Salary levels are notoriously poor in most regional and local newspaper companies and Western Mail and Echo Ltd. is no exception. One experienced reporter at the company told us:

Since the unions were de-recognised under the Tories in the 80s there's been a dramatic reduction in real-terms pay and also the perks associated with job. They've been able to keep pay down for years because the union wasn't recognised. Levels are really low, especially for trainees. We're only now starting to get a voice again, and we're starting to negotiate from a very low point.

Table 3.5: *Editorial Staff Pay Scales at the Western Mail, the South Wales Echo, and the Wales on Sunday*

Job Title	Salary
Grade B Trainee Journalist	£11,113
(after 6 months)	£13,036
(after 18 months)	£14,157
Grade A Researcher	£14,844
Grade C Senior Journalist	£19,196
Grade D Advanced Senior Journalist	£20,997
Grade E Senior Specialist	£22,794
Grade F Assistant Department Head	£23,994
Grade G Advanced Specialist	£26,394
Grade H Experienced Exceptional Writer	£28,047

Source: NUJ. These pay scales were current at the time of publication but were due to be re-negotiated in March 2007

Table 3.6: *Editorial Staff Pay Scales at Western Mail and Echo's Magazines and Weekly Newspapers*

Job title	Salary
Trainee Journalist (pre-Newcastle)	£11,113
Trainee Journalist (post-Newcastle)	£13,036
After 6 months	£13,601
After 18 months	£14,157
Advanced Senior Journalist	£17,398
Office No 2 / Production Senior	£19,196
Advanced Production Senior	£20,997

Source: NUJ. These pay scales were current at the time of publication but were due to be re-negotiated in March 2007

As Tables 3.5 and 3.6 show pay levels for trainees at both the daily and weekly newspapers are extremely low. Almost all trainee journalists are graduates, and many will also have undertaken additional postgraduate vocational diplomas before starting with the company, but none can expect to enter on an annual wage larger than £11,113. In 2006 the UK nationwide average graduate salary was £20,300 (£20,035 in the private sector and £21,445 in the public sector) (The Hay Group 2006). With starting salaries in the company this low, and short-term prospects of rising to only

£14,157 at the top of the trainee scale, pay at the company is significantly below the national average graduate wage.

Another Western Mail and Echo employee expressed his concern:

Pay is a disgrace. I've been working in regional newspapers for 20 years and amongst my oldest friends there is still a presumption that what we do is terribly glamorous, very exciting, and consequently very well rewarded. But they've just bought into a stereotype that's so far removed from the truth that you wouldn't believe it. In reality the bulk of people in the regional media earn very poor money.
When you look at levels of pay in terms of age, experience, skill, and qualifications, in relation to other white collar professionals of comparable age and experience they are appallingly bad.

The comparison with pay scales in other professions is a fruitful one. Teachers, for example, can expect a starting salary of over £20,000, and the upper level of their basic pay scale is now almost £30,000. Upper-scale teachers' salaries regularly exceed £34,000, and in addition to the basic pay there is a complex system in place to reward extra administrative and other duties taken on by staff (NUT 2006). Journalists starting out at the Cardiff newsroom, then, can expect to receive just over half the salary of a teacher entering their own profession. The largest proportion of editorial staff at the Western Mail and Echo are relatively experienced and are on grade E (£22,794), which places them in equivalence with a very junior teacher on the second or third grade of their salary scale.

In addition to very low basic wages, journalists in Cardiff have also seen their allowances cut. One reporter explained:

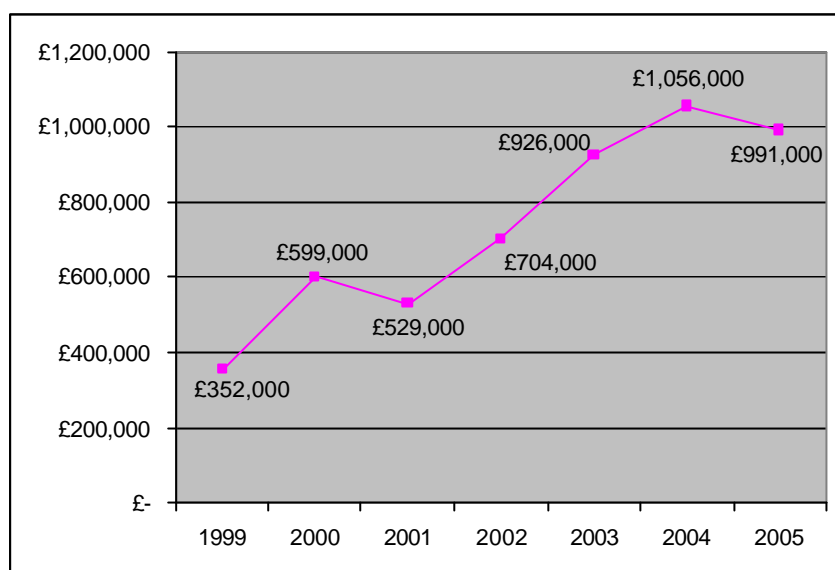
Traditionally in regional newspapers pay has been bad, but there were always things which offset pay. The expenses used to be good there were perks here and there. All of which in recent years has just been chipped away and eradicated, and what that means to us is that the gap between what we earn and what the bulk of people in comparable other professions earn has widened, and is continuing to widen.

Another told us that staff "used to have a system of allowances where if you worked through your lunch break, or late at night, you got extra money for meals", however, since the de-recognition of the union "things like that were scrapped and never came back".

Of those who responded to our survey, a small minority (16%) said they felt that salaries in the Cardiff newsroom had increased in recent years, 63% said that they had "remained the same" (and kept up with inflation), and the remaining 22% felt that wages had decreased.

In contrast to a long period of stagnation in which reporters' pay has barely kept up with inflation, levels of pay for high-ranking executives at Trinity Mirror have increased sharply.

Chart 3.7: Trinity Mirror Chief Executive's Pay, 1999-2005



Source: Trinity Mirror Plc Annual Accounts

Take, for example, the massive self-awarded pay increases of Trinity Mirror's last two Chief Executives. Chart 3.7 shows salary figures that include bonuses and extra awards, but excludes (very lucrative) share options. Between 1999 and 2002 Philip Graf doubled his wages to £704,000 despite introducing a disastrous and extremely costly multimedia policy. Not to be outdone, incoming boss Sly Bailey soon gave herself a £222,000 rise, and went on to take the salary level for her position to an unprecedented level of more than £1 million. Her wages decreased slightly in 2005, as her performance-related bonus was cut from £450,000 to £360,000, but this will be offset in 2006 by a recent 12.9% increase on her £620,000 basic salary.

Journalists at different Trinity Mirror centres around the country are negotiating a pay rise as this report is published and many find it particularly galling that they are fighting hard to keep in line with rises in inflation while the management enjoy such extravagant pay increases. One union negotiator in Liverpool commented:

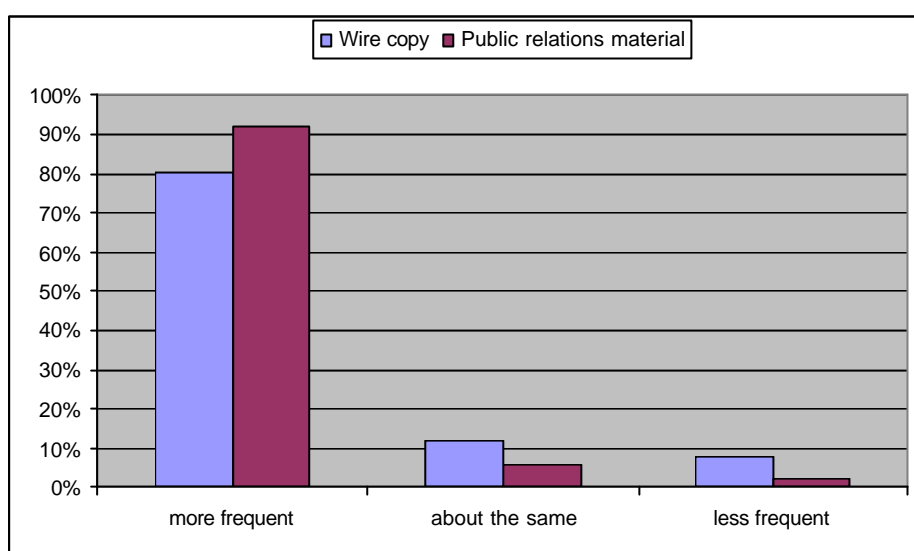
We're having pay discussions at the moment and we just met to reject a pay offer of 3% last Tuesday. That was the very day the RPI came in at 4.4%. Naturally we told management that we aren't prepared to accept what is, in effect, a 1.4% pay cut in real terms. We also said that Sly Bailey awarding herself a 12% pay rise, which comes to around another £80,000 a year, was to put it mildly, a bit unhelpful.

3.6 Editorial Content and Non Journalistic Sources

It has become commonplace to point out the increasing role of public relations and news agency copy in shaping news output in the UK. Journalists complain more and more that the time constraints placed on them by cuts and underinvestment mean they have little choice but to turn to such cheap, convenient, and pre-packaged sources.

Recent empirical research conducted by a research team at Cardiff University found that 60% of articles in the quality national press derived wholly or mainly from such sources (Lewis, Williams, Franklin, Thomas, and Mosdell 2006). Interviews and survey findings from this report suggest that the situation in the regional and local press is no better.

Chart 3.8: *Survey: How has journalists' use of wire copy and PR material changed across the last decade?*



NB: Surveys were sent to 130 members of the Western Mail and Echo NUJ Chapel. All percentages refer to proportions of the final sample of 51 survey respondents

Our survey of opinion at the Cardiff newsroom found that 80% of respondents thought journalists were now forced to rely more on press agency copy than previously. 12% (6 journalists) felt use of the wires was about the same, and only 4% that it was now less frequent. Opinion on the use of public relations copy was even more emphatic, with 92% of staff saying that the use of PR has increased over the last decade, 6% claiming it had remained constant, and 2% saying it was now used less.

One former Trinity Mirror editorial staff member from the North East explained that it is now commonplace to use the wires to pad out a newspaper. **“If a story crops up on PA that had a local tie-in, then that would be a bonus and if you could make it into a page lead without involving a reporter then you’d do that on the news desk. You’d just re-hash the PA”.** He went on to give an example of how staffing pressures have meant that the news agency stories are used to supplement unique local copy even on important stories:

One time I wanted to go down to Leeds to cover the trial of Wearside Jack, John Humble the ripper hoaxer, which was a big story. So I was all ready to go and then I got the phone call to say they needed me in the office, so we had no-one there for one of the biggest criminal trials in the history of the North East. We used some of the background I’d already written and took the rest off PA. This happens too much.

A Western Mail and Echo employee explained:

It's true that there's pressure to turn to outside sources for copy, given the workload of many journalists. I see it all the time. Because of the cut-backs that have been made you've got to turn elsewhere. You've still got the same amount of white space to fill between the adverts, to put it brutally, so what are you going to do?

Another journalist from the Cardiff newsroom added:

You can make a fairly safe assumption that in those newsrooms where staffing levels have fallen but there is still a comparable level of pagination to 2-3 years ago, if there are fewer bodies around to fill the same amount of space it's inevitable that some of that will be agency copy or press releases which are dropped in.

And a 3rd reporter told us, that **“generally for most reporters there's not the time to go out as much as they should. The job is done more and more by cutting and pasting press releases because they're under pressure and there's space to be filled”**.

The consequences for the independence and quality of the newspapers caused by using significantly more wire and press release copy are obvious. One reporter told us plainly, **“I think it's inevitable that the quality of the news has suffered because of this. Sometimes we're in a state of desperation just to fill the paper, and that means the quality can't possibly be the same as it would be if we spent some time doing the job and developing stories”**. Another staff member said, **“if we are getting more copy for free from PR agencies, and we are, this raises lots of questions about journalistic independence and journalistic integrity”**, and continued:

If you don't have the journalists to do [a story] you have to turn to PR agencies and the rest, who are going to give you a skewed idea of whatever subject matter they're writing about because they're trying to please clients, and **this opens up all sorts of questions about integrity and the whole way the press works as a watchdog.**

And another expanded on this:

If there's one area that journalists can stand up and look other people in the eye it's by saying that what we do is worthwhile because we keep an eye on people in positions of power whether they be politicians, businesspeople, whatever. **If you don't have the chance to ask these people awkward questions, and if the only ones who do are PR people working on behalf of these organisations where does that leave us? I hate to get highfalutin' about it but this raises questions about the whole democratic process.**

3.7 The Free *Metro* Daily Press

In 1999 and 2000 Trinity made a franchise agreement with Associated Newspapers which allows them to launch editions of the *Metro* free newspaper in Newcastle and Birmingham as well as a Scottish edition for Glasgow and Edinburgh. These free newspapers (sometimes described by journalist in derisory manner as ‘free sheets’), which are handed out in the streets or left at key commuter transport hubs, provide minimal local news content (indeed the franchise agreements made between Associated and its local partners stipulate there can be no local “editionising”), and are centrally produced by a small editorial team in London.

Table 3.7: Revenue and Profit From Trinity Mirror’s Free Metro Regional Titles

	Metro: Turnover	Metro: operating profit/loss
2005	13,300,000	1,900,000
2004	11,900,000	1,300,000
2003	10,500,000	200,000
2002	9,100,000	-1,500,000
2001	8,300,000	-4,500,000
2000	2,600,000	-4,000,000
1999	N/A	-300,000

Source: Trinity Mirror Plc annual accounts

Trinity’s start-up costs for these enterprises were in excess of £4 million. By 2001 the group was distributing an average of 259,000 copies daily, but despite a turnover of £8.3 million, the venture still made an operating loss of £4.5 million. A year later this loss had been reduced by two thirds due to what the company report calls “improving advertising revenue and cost reductions” (Trinity Mirror 2002). Further ‘tight cost control’ and strong advertising income ensured that by 2003 the titles made money for the first time. Another year of continued growth in 2004 was driven by a 12% increase in display advertising revenue, and a 44% rise in recruitment advertising.

In March 2006 Trinity launched two more *Metro* editions in Cardiff and Liverpool, which both broke even in the first half of 2006. Unlike the rest of the group, the *Metro* titles also achieved strong advertising growth (26%) in the first half of 2006.

In almost every city in which Associated Newspapers have set up franchises of *Metro* there has been concern about how its introduction will affect already falling circulation at established paid-for titles. To many in the regional press it seems that entering into an agreement with a robust daily free-sheet competitor can only have adverse effects on existing daily newspapers. One former Trinity Mirror Employee commented:

The *Metro* was a source of some resentment. I used to take the underground to work in the morning, and everyone would be reading the *Metro*, and nobody would be reading my paper. Trinity Mirror

must have got a very good contract to print it, but a lot of people couldn't see the logic behind it. It must have made the company a lot of money.

This is a widespread impression, but a mistaken one. Even in 2005, Trinity's most successful year with the Metro, its turnover only represented 1% of the group's overall revenue. However, despite the relatively small potential gains the nature of the deal offered by Associated to its regional partners left them with very little choice but to accept. One Western Mail and Echo employee explained:

Associated Press have been approaching people city by city with a loaded gun, and saying our plan is to do this, and if you agree then you're in a partnership with us, and if you disagree then we'll do it anyway. It's going to affect your sales anyway to a greater or lesser extent, so companies enter into the agreement to limit the damage.

The "damage limitation" exercise referred to here means accepting a deal in which Associated Press pays Trinity Mirror to print and distribute the *Metro*, and keeps 100% of the national advertising revenue. Trinity then gets to keep the profits from local advertising, and organises the printing and distribution of the free sheet within Cardiff. He continued:

It's dead clever on Associated's part. They're purely using it as an advertising platform and they are gradually increasing what they can charge national advertisers because every year they can go back to them and say they've increased circulation by such and such, and tell them they've rolled out to Cardiff and this city and that city. **The overheads are minimal, the editorial team is very small and uses a lot of re-written PA copy.** The core of their business strategy is to make money from this national advertising without the extra problems associated with printing and distribution. **Trinity Makes a little profit from it, but it's very small.**

The key question, however, is not whether Trinity makes a profit from the deal, but how the Metro is affecting circulation and advertising sales at its core print products.

What concerns us is how much it has affected sales of the paid-for newspapers, and also has it affected these papers' advertising revenue. And the answer is we don't really know yet. Clearly there must be some knock-on effect unless all the advertisers in the *Metro* are new advertisers. Keith Dye the managing director here said in his annual presentation to staff that he believed that the launch of the *Metro* had only affected circulation at the *Western Mail* by less than 1%. He couldn't explain how he got to that figure and he said it was very difficult to get a genuine figure, but that was his estimate.

Another employee told us:

It's bound to have an effect. It's inevitable that if people are just looking for a general overview of the news, and not any real local copy, they'll pick up the *Metro* and not buy the *Western Mail*. I'm sure it's impacted on the *Echo*, too. At the end of the day it's not a bad product for nothing.

Another reporter expressed similar sentiments:

It's bound to have an effect on the *Western Mail* as it's in direct competition with it in the mornings, but I've noticed since the *Metro* was launched that I'll see people reading it on the bus home who perhaps a couple of years ago would have been reading the *Echo*, so I think it's hit both papers. There's a sense that because the company is involved with this initiative, that they are in effect kicking their own journalists in the teeth.

The *Metro*'s impact has undoubtedly been greater on the *Western Mail* because as a morning newspaper it is a direct competitor. **The Cardiff Metro's print run has recently increased from 21,000 to 25,000, and its readership is claimed to be much higher due to the way that used copies get passed around the workplace or left on public transport for others to pick up.** When you consider that the *Western Mail*'s circulation has dipped below 40,000 for the first time, these are highly significant figures, and should not be ignored.

The deal has also adversely affected the evening *South Wales Echo* but in a less direct way. One editorial employee explained that the quality of the *Echo* had been hit by the way in which less editions were now being printed and deadlines had slowly been tightened in recent history:

In 2000-2001 the *Echo* was still producing six or seven editions a day, and copy for the last edition went at 1.35pm. Now we produce three editions a day, and copy for the last edition goes at 11.35am. Correspondingly there are now more pages produced overnight. What we have live on the day – anything that happens after 11am – is going to be in tomorrow's paper. Depending on the nature of the story and who you're trying to get hold of you have less time to get a quote or reaction, and less time to be at a job to get first-person pieces. Increasingly and distressingly there are examples of OK, we'll run that tomorrow. **We're reducing the paper's topicality, and it's becoming increasingly difficult to call the *Echo* an evening newspaper.** I wait for the day when someone brings a prosecution under the trades description act – you can't bloody call it an evening newspaper any more. **And the reason we were recently brought forward an hour was to accommodate the printing of the *Metro*. We now have an hour's less live time on the day simply so they can print the *Metro*.**

It has so far been difficult to gauge the free newspaper's precise effects on Cardiff's paid for dailies, but the introduction of the *Metro* is seen by many as a significant contributor to the further decline of the *Western Mail* and the *Echo*:

Whenever we talk about what's hit our circulation figures, we talk about pagination decrease, staffing decreases in terms of editorial, losses of other support staff including newspaper sales, changes in peoples' general consumption of news, cover price increases, but also the introduction of the *Metro*. It has to have an effect.

4 Previous Online Strategies at Trinity Mirror

This chapter examines Trinity Mirror's previous online strategies in the context of the more general move to online news provision in the UK. It looks in detail at the failed Phillip Graf 2000-2001 digital strategy, and recounts the company's recent moves to dominate the UK classified and small-ad internet market.

4.1 Context

The development of internet news and services by UK media companies has developed through a number of distinct phases during its short history. Two important events mark the beginning and end of the first phase: the launch of the online *Electronic Telegraph* (the *Daily Telegraph* was the first UK newspaper to provide online content) in 1994, and the launch of the *Guardian Unlimited* in 1999. Richard Withey, head of interactive media at Independent News and Media, told us:

This period saw cautious investment that rose slowly until the end of the decade, as did the numbers of editorial and other staff employed to work on web content. The end of this period also saw a lot of forecasts for market growth, web advertising revenue, and growth in classified advertising online that turned out to be gross overestimations.

Because investment in online news had remained fairly cautious in the industry, the dot-com crash between March 2000 and October 2002 did not significantly affect employment or profitability at most newspaper companies.

Trinity Mirror, however, was virtually alone amongst its competitors in launching its main online presence and investing heavily in digital news during at the height of the dotcom crash. Consequently, the responsibility for the ignominious failure of Trinity Mirror's first online strategy lies firmly with the company's management and cannot be satisfactorily explained by the vagaries of luck and the uncertainties of a fickle market (for more on this strategy see section 4.2 below).

The bust was followed by a period of quiescence in the early years of the new millennium, during which time few of the major UK newspaper companies (with the exception of Guardian Newspapers Ltd.) invested heavily in online services.

A turning point came in April 2005 when Rupert Murdoch made a landmark speech to the American Society of Newspaper Editors, in which he admitted having ignored the internet for too long, and pledged that his company would now concentrate on the new media. He famously described himself and his generation of newsmen as "digital immigrants", and stated that the young people that form the new media market:

don't want to rely on a God-like figure from above to tell them what's important and, to carry the religion analogy a bit further, they

certainly don't want news presented as gospel. Instead, they want their news on demand, when it works for them. They want control over their media, instead of being controlled by it. They want to question, to probe, to offer a different angle. (Murdoch 2005)

His appeal to media workers to change or face continued irrelevance had a galvanising effect on the industry, and has been followed by significant investment across the board, especially into buying up the dot-coms that survived the crash of 2000. Richard Withey commented that “at the moment the internet is the only sector of the news market that is showing growth in advertising revenues, although we should note that this growth comes from a low base, and its potential is still unclear”.

4.2 The 2000 Digital Media Strategy in Outline

In 2000, significantly later than many of its competitors, Trinity Mirror announced a massive three-year planned investment programme of £150 million to build up its internet presence. Central to this strategy was the development of their *IC* network of national and regional news websites. The annual report stated:

Our aim is to capture a substantial share of online advertising and e-commerce through the development of the UK's leading “local portal”, seamlessly integrating superior national and local content and turning the traffic that this content will generate into revenue. (Trinity Mirror Plc 2000)

In the years 1999 and 2000 the company invested almost £50 million in its various online interests (the money was spent primarily on promotion and marketing, new technology, and new staff).

4.3 The Failure of the Strategy

Just one year later, however, by the end of 2001 the company backtracked on its online plans. The much trumpeted online revenues translated into a meagre £900,000 (just 0.08% of the group's overall turnover). The then chief executive Philip Graf in a telling about-turn told the *Financial Times*, “We never saw [online] as a revenue generator. It was a means to establishing a brand” (O'Connor March 16th 2001). The group's chairman Sir Victor Blank rather candidly admitted that “**we needed to reconsider our digital media strategy and investment as the market for online revenues became almost a figment of imagination instead of a reality**” (Trinity Mirror Plc 2001). In the wake of the increasingly obvious dotcom crash, Trinity's digital media division had to be “restructured” so costs could be “substantially reduced”. Philip Graf went into more detail:

Digital media is still regarded by us as an important enabler for our future growth and it is vital that we continue to invest in this area. However, during 2001 we had to take some tough decisions. Clearly, the digital media strategy we announced in 2000 was not working. (Trinity Mirror Plc 2001)

Graf expressed Trinity's new perspective on the future of online news in more general terms in an interview for the journal *British Journalism Review*:

I don't believe any of us involved believe all the hype [about the web], much of which is clearly unsustainable. We see the internet as helping us protect and develop our existing franchises and as another way of supplying information to people and services to commercial customers. Whether it is a way of making money is certainly less clear than 12 months ago. However, we believed that, given the strengths we have, we can genuinely supply a service to people. It won't replace the profit stream from newspapers, absolutely not, but it is an important addition and a way of exploiting our strengths. (Hagerty 2001, p.27)

The immediate effect of this change of heart was a major restructuring programme involving the sell-off of the company's internet service provider (IC24), the re-launch of the regional IC network of regional news sites, and substantial job losses (which cost £4.6 million in redundancy payouts). Future spending on digital media within Trinity was capped at £10 million per annum, and it was decided that much of this budget would be set aside for developing the *Fish4* classified advertising sites.

4.4 The Cost of the 2000 Online Strategy in the Newsroom

One journalist explained what implications the affair had for the Western Mail and Echo newsroom:

There was a large if belated investment off the back of the dotcom bubble, and Trinity Mirror were quite late on the scene. **There were people who were saying hang on a minute, you're throwing an awful lot of money at an exercise that already is on a downward slope. And so it proved. People were employed at Western Mail and Echo, they installed a new state-of-the-art digital newsroom, then it all went tits-up and there were double figure redundancies.**

Another Cardiff employee went into more detail:

There were a fair few jobs created. Somewhere in the region of about 50 I think at Western Mail and Echo. It was during the first dotcom boom and the company was jumping on that particular bandwagon in the hope that they were going to increase revenue, but it became clear quite soon that the revenue streams they'd hoped to open up simply weren't there. **Within 18 months this fairly large team was reduced to about a dozen, and it remains at that sort of level now. The majority were simply made redundant.**

Another employee went on to outline the current state of the online news team in Cardiff:

IC Wales isn't very well staffed at all now, and they're just doing things as cheaply as they can. That's the motivation of the company. How cheaply can we do it? Quality just isn't important to them. I think the editors feel strongly too that we haven't got enough staff, but their hands are tied from on high.

He continued, “We as journalists found the whole exercise rather frustrating really, as it just didn't work. That's what it comes down to. We're in danger of a similar situation now in my opinion”.

4.5 The Post-2001 Strategy

Between 2001 and 2005 the company's online plans have been markedly less grand than in 2000. Sustained cost-cutting has resulted in online teams at the regionals being severely pared down. In tandem there has been continued low-key investment in the acquisition of small local and regional classified websites dealing in recruitment, property, and motoring advertising, as well as the development of the large national *Fish4* network of sites.

Table 4.1: *Performance of Trinity Mirror Digital, 1999-2005*

	Digital media turnover	Digital media operating profit
2005	11,100,000	2,900,000
2004	6,100,000	700,000
2003	3,800,000	-3,800,000
2002	7,000	-7,600,000
2001	9,000	-23,500,000
2000	2,500,000	-42,300,000
1999	1,500,000	-7,000,000

Source: Trinity Mirror Plc annual accounts

By 2003, after a sustained cost-cutting programme (including further job losses), and rises in the price of online advertising, the company was able to report a “robust” performance for its digital wing. Online advertising revenue for the year increased to £2.4 million, although this only represented 0.2% of overall revenue.

As Table 4.1 shows the following year Trinity's digital sector made money for the first time after accumulated losses of over £77 million since 2000. Chief executive Sly Bailey stated that “in our regionals division we have focussed on becoming a true multi-platform local publishing and advertising business. The performance of our digital media activities [...] has significantly improved” (Trinity Mirror Plc 2004). She also talked about the success of *Fish4* as the UK's most popular website for jobseekers, and the launch of two new recruitment websites in Scotland and Wales.

In 2005 four more online advertising businesses were bought (*Smartnewhomes*, *GAAPweb*, *Hotgroup* and *Secsinthecity*), nine local recruitment websites were launched, and ten community “low-end classified ‘for sale’ and ‘wanted’ advertising” sites. All of this, explained Sly Bailey, was done in order to “win strong, profitable positions online that complement our print brands”, and “establish a foothold in new markets” to allow “revenues to build over time” (Trinity Mirror Plc 2005).

Its investment in the net continued into 2006, when it launched a chain of local property sites across the UK, and acquired *Email4Property*, a company that provides consolidated listings for estate agents across Britain.

5 The Move to Local and Regional Online Journalism, 2006-2007

This chapter outlines the recent history of the shift to multimedia news provision in the UK's local and regional press. It sketches the progress made by the industry's leading players, and provides a detailed case study of Johnston Press's multimedia pilot project at the Lancashire Evening Post. This case study is principally based on interviews with staff and sources close to management at the company.

Rupert Murdoch's influential speech to the US society of editors in 2005 acted as a wake up call to newspaper owners about the necessity and urgency of developing online news content. There was now a general consensus amongst regional and local press owners that falling print circulations and the prospect of losing advertising revenue to online competitors, as well as changing patterns of media consumption, meant that the move to digital news was inevitable. As well as the very real threat to advertising from online sites such as *Craigslist*, traditional news companies now had to contend with new and growing content providers such as *Google*, *You Tube* and citizen journalism sites like the Korean *OhmyNews* and San Francisco's *iTalkNews* (Pilling 2006). Most of the worldwide regional and local news sector had until this point only been dabbling in the online news markets, but now they were obliged to develop more sustained and detailed plans to nurture their multiplatform news capability.

Emily Bell, the influential editor of *Guardian Unlimited*, sums up this rather deterministic mood, recounting a conversation she had with US technology journalist Dan Gillmor:

I asked him what he thought about newspaper companies that invested heavily in the web despite the fact that it still had relatively small revenue streams and a competitively unpredictable future. "What choice do you have?" he said. "It's either certain death with a possible shot at the future... or certain death". (Bell 2005)

In 1999, the *New Yorker* magazine writer and media expert Ken Alluetta offered a prescient prediction of the direction in which newsrooms were heading when he singled out changes being made at US regional daily the *Chicago Tribune*. He proclaimed:

Tribune has become a prototype for the cutting-edge newspaper company of the future [...] its newsrooms are multimedia models with robotic cameras, digital audio and video equipment and a central command desk shared by editors from its TV stations, its 24-hour local cable news channel, its radio stations and its internet publications. (quoted in Pilling 2006)

It had taken five to six years, but the rest of the industry was finally catching up with these early trailblazers. Buzz words such as “brand synergy” (making profitable connections between the printed newspaper and other forms of media), and “convergence” were suddenly heard everywhere. Newsrooms were to be turned into “multimedia hubs” and journalists into “content providers”. Former editor and media commentator Roy Greenslade commented:

The key to long-term circulation success for newspapers lies in viewing the printed paper as a “core brand” on which to build a host of digital “products”. Though we journalists may blanch at those terms and possibly recoil from the concept, we have to appreciate that our future is tied to wooing an audience that is gradually turning its back on our inky output. And we have to do it fast. [...] Business logic dictates that in times of falling revenue, costs should be cut until conditions change for the better. In the case of newspapers though, there is no guaranteed better. Instead, there must be investment in [all] kinds of spin-offs [...] plus the willingness to take risks. (Greenslade December 6th 2005)

Different UK national newspaper companies have taken differing approaches to the internet. The *Telegraph* has recently made waves with its new digital newsroom. The Guardian Media Group has clearly had the most success with its online news product, but they have also invested far more than any other firms. The unique aims of the Scott Trust mean that Guardian Newspapers Ltd. are not subject to the same short-term economic pressures as companies which have to report to shareholders, and they have consequently been able to invest in the long-term future of their internet news portal *Guardian Unlimited* while absorbing some fairly substantial losses. The other major player in internet news in the UK, the BBC, spends £100 million a year on its website, a sum that no commercial company can hope to replicate (Bell 2005). It is important to acknowledge that Britain’s two most successful online news providers have both had their operations subsidised in different ways.

5.1 UK Regional and Local Online News

Online news is a risky business, which is evidenced by how few regional and local news companies to date have made any significant commitment to the project. Aside from the much-discussed pull of multiplatform news provision, actual progress has been fairly small-scale and quite piecemeal.

Associated Newspapers has taken a cautious approach to video on its websites. The *Mail* titles and *Metro* use small amounts of video, mainly limited to showbiz coverage with little hard news content. Its regional news division has piloted a number of interactive features on the *Hull Daily Mail*’s website *This is Hull and East Riding* including numerous polls, the possibility of commenting on stories, podcasts, video clips, regular video bulletins, and RSS breaking news feeds.

The Guardian Media Group’s regional titles have been engaged in less widespread experimentation with online than its nationals. Most of its work in the regions has centred on the *Manchester Evening News*. Journalists have been sent to train at the

Newsplex multimedia and convergence centre at the University of South Carolina. They also gain multimedia skills at the newspaper's city-wide television station *Channel M* (an operation which has also received significant investment in recent years). Video and audio clips are produced for the web by some reporters. *MEN* editor Paul Horrocks has said, "print is still at the heart of the business but we need to understand how best to attract an audience, whatever the media portfolio, and then sell that audience to advertisers" (Pilling 2006).

Newsquest claims to be a big player in the provision of internet news. It trumpets the fact that it has the largest *audited* audience of any local newspaper publisher in the UK. This is not, however, a major achievement as so far most of the major regional news companies have refrained from releasing audited figures, or even letting their hit-rates be scrutinised by ABC Electronic (which is the most reliable internet readership auditing company in the UK). Many believe this is because these companies fear the low readership of their sites might deter potential advertisers.

5.2 Case Study: The Johnston Press digital strategy

On paper the Johnston Press digital media strategy is very similar to that of most of its competitors. The stated plan of the UK's second-largest regional news company is to: "Grow digital classified advertising businesses to attract new markets", "extend local market leadership by becoming the preferred provider of local news and community content", and "enhance skills, processes and culture to embed digital thinking and practices" (Johnston Press Plc, 24th October 2006).

In the first aim the group is following Trinity's lead, and pursuing a policy of building online small-ads businesses that Trinity Mirror has already been implementing for a number of years. In respect of the other two aims, however, it is generally acknowledged that Johnston is leading the field. Significantly, when it comes to investing in the digital future of the core news product, the company is becoming a market leader.

Its official literature on the subject is telling in its focus on, and recognition of, what readers actually want from local and regional news providers. It quotes research done by the Poynter Institute in the USA about readers wanting truly local news (specifically on sports, civic pride, the environment, the public sector, and transport), community campaigns, more interaction in both paper and online news formats, nostalgia and archive content, and effective use of still images.

In order to deliver on this Johnston is committed to the convergence of news and web teams into one integrated news-provision team in its newsrooms; the formation of "centralised multi-channel news desks"; the creation of digital editors to manage online content; reporters that produce video and audio as well as words on the page; sub-editors that work on paper and the web; and the introduction of a web-first news publication strategy. Its uniquely web-based content will consist of online polls, forums, video, vox-pops, readers' pictures, and extensive blogging.

Before implementing these digital plans across the board the company piloted them in the creation of what it calls the "newsroom of the future" at the *Lancashire Evening*

Post in Preston. This pilot project (discussed in more detail below) resulted in the restructuring of the newsroom along the lines explained above, an extensive re-training programme for existing staff, and (crucially) the appointment of experienced experts and staff to plan, implement and carry out the changes. They have also sponsored the UK's first university chair in digital journalism at the University of Central Lancashire (a post filled by the American academic Professor Jane Singer in January 2007). The company's latest plans involve £5 million investment in online, and rolling out the digital newsroom format at 70 more of its regional and local newspapers by the middle of 2007.

Despite the understandable urge of the company to emphasise its commitment to and investment in digital news, and its managers' willingness to proclaim its online strategy a success, it would be entirely wrong to hold up Johnston as a model practitioner in the field. As is usually the case the rhetoric of senior management differs somewhat from the experiences of media workers on the ground. Workers with knowledge of the pilot project have only muted praise for (and some criticism of) the way it has been instituted, and NUJ members in Johnston's Leeds newsroom have boycotted all digital media training because they see it as an excuse to get them to do more work with no extra financial incentive.

5.3 Johnston's *Lancashire Evening Post*: The newsroom of the future?

The *Lancashire Evening Post*'s editor Simon Reynolds has spoken effusively about his newspaper's recent successful and smooth transition to online. At a recent Society of Editors conference he gave a short presentation on the "newsroom of the future", stating:

We've heard an awful lot about the *Financial Times*, the *Guardian* and the *Telegraph*. I've got five minutes to tell you about our quiet revolution in Preston over the last seven or eight months. Not only have we reinvented the newspaper in that time but we are effectively not a newspaper any more. We have been transformed into an integrated fully converged news operation. (Ponsford, 6th November 2006)

He went on to claim that reporters are now producing 500 stories a week, 550 pictures, and 20 video clips for the website, and that two extra editorial staff members have been hired in order to bear the brunt of the extra work demanded by the production of video for the internet. Hyperbolic claims about the revolutionary nature of the pilot aside, it is clear that there has been real change in the nature of the content produced and the work conducted by the editorial and production staff in the newsroom, and it is worth exploring this in more depth.

Changing working conditions:

In line with moves made already at a number of national newspaper operations, the two major changes introduced under the multimedia policy involved a switch to a web-first editorial policy (where some or all stories are broken on the internet instead

of the newspaper), and the production of video clips for the web by re-trained print journalists. A Johnston journalist with knowledge of the pilot project told us “there has definitely been an increase in workload because of online. We’ve had two extra bodies in the newsroom, but to be honest they really should take on more people to do this”.

According to this source, the web-first policy has had the most impact on the working lives of staff, as making best use of the potential of the web means not just writing stories, but also providing readers with links to related stories from the company’s archive.

For example if they have a story about traffic chaos in Lancashire when they write the story they’ve also got to go into the archive and find three or four other stories of previous traffic chaos. They’ve got to do that on every story. This causes a lot of work, and we’ve had some pretty bad technical problems.

He also spoke of the fact that writing for different formats necessitates different skills and different styles, something which inevitably means more work. Video content, of course, takes more time to produce than anything else, but this is mainly the preserve of a small number of journalists:

Not too many of the reporters have taken on the extra video duties. The two who were taken on especially for the job tend to do most of it. Occasionally you get some people who take a camera out if they’re doing a band review or something like that. Also, the weekend duty reporters sometimes have to do a video story, maybe about the football. We’re also now doing a lunchtime video news bulletin during the day.

As well as affecting the lives of reporters, the changes have had a significant impact on the workload of sub-editors. The subs have taken on the role of doing the extra editing needed to change the day’s lead stories to make them suitable for the internet. The web-first system that was ostensibly meant to allow journalists to submit copy straight to the website did not factor in the need to sub-edit the copy beforehand. Subs now take the stories from the pages of the newspaper and put them up online. “It can be done automatically with our system”, said our source, “but what you get then is an un-subbed, unedited, over-long stories online”. They have to correct all the mistakes, write another headline, and take the story’s length down from anywhere between one third and a half so that it is suitable for the web. “All the day’s lead stories are done like that” he continued, but “the small stories and the NiBs, tend to go up automatically”. He went on to explain that workers had initially feared the pilot might sound the death-knell for sub-editors, but that in practice things had worked out very differently:

The accountants, I’m sure, thought the web would eliminate the need for subs, and we did think they’d try and sideline them at the start. In reality the web has created a lot more work for them – it’s probably increased by around 20%. The problem is with online you’re asking the reporter to do three jobs. There’s an interview where they have to

write everything down in shorthand for the newspaper, possibly then a sound and video interview where you have to ask different questions as it's a different format and it's gotta sound right, then if those stories then go up on the internet with no subbing or quality control you're going to have a disaster.

Additional resources:

Johnston is almost alone amongst its competitors in taking on extra staff to cope with the new work generated by producing news for delivery on multiple platforms. A management source close to the developments at Preston told us:

We recruited extra people. What most of the newsrooms are doing is recruiting a digital person to spearhead the website side of things. What we did because we're heading up the digital project at the *LEP* is get in four extra staff [two of which were editorial staff] and a lot of extra equipment – for a local or regional newspaper this is quite extraordinary in the current climate when lots of regional newspapers are going in the other direction.

Our journalistic source with knowledge of the Preston experiment corroborated this, but emphasised that this level of recruitment was probably extraordinary, and mainly due to the *Lancashire Evening Post*'s special position as a pilot project.

They actually took on two new reporters for our office because we were the pilot newsroom for the scheme. Obviously they wanted it to do well, so there was a little bit of extra money found. We've got a full-time sport and a full-time news online reporter whose job it is to go out and do most of the video clips and interviews.

Even with these added human resources, however, staff members still feel stretched, and many believe that more help will be needed if quality is to be sustained. **“We're going to need a couple of extra subs to cope with that extra work”, he continued, “and if they really want proper video and sound coverage they will have to get more reporters in, I think probably another two there on top of the 14 that they've already got”.**

In addition to extra staff Johnston has spent money on training (including training for all staff in web-publishing technology, and some video journalism training at the nearby University of Central Lancashire), as well as computer equipment (including video editing hardware and software). Even with this extra spending, however, the pilot has not been without technical glitches.

There have been consistent problems with archived story links on the news page. A central feature of any web-first publishing outfit, these links often turn out not to work for users of the website because the computer equipment being used is not fit for purpose. A company editorial staff member told us:

We've got a system in place at Johnston that goes through all of our papers that's called a Miles publishing system, and it's got a lot of

faults. They've been made worse by having to incorporate the internet side of things as well. We do have quite a few problems, as it's an advertising publishing medium rather than a journalism one that's sort of been bolted together.

He added, however, that overall this particular issue has not caused much unease amongst workers, and that most think it is inevitable that there will be some teething problems at the start of a project of this kind.

Popularity of web content:

As the above quotation from the editor Simon Reynolds suggests, in many ways the pilot has been a success. Our Johnston management source was emphatic in backing this up, and in attributing much of the success to the introduction of video content:

What we've found is that there is no doubt in terms of the number of page impressions and unique users that came and rose enormously very quickly as we started putting video on the website. We're probably averaging monthly 1.3 million page impressions since April, and our web readership has gone up five-fold since we started enhancing the website, which involved adding video, adding audio, adding more interactive, and doing breaking news. We're using the full potential of the web and using it for what it's good at, which is instant news, and audio visuals, and this has certainly had a dramatic effect.

He also claims that the readers and viewers the site has attracted are very valuable to the company because they represent a social group that is very attractive to advertisers:

Our research tells us that we've got a huge and profitable audience for the site, for example, I think the most popular age-group we have online is between 30 and 40 years old. It's not your older readers, and not the teenagers, but it's a good market of young working people who mainly access the internet from the office during the day.

Our source on Johnston's editorial staff backed this up, saying, "the web is racking up the hits, and the advertising department appears to be happy about it because they can sell into both media". But he added a note of caution about the future effect of web readerships on print sales:

But it's hard to say how much it's hit sales. Sales are down, but they're always down. I don't think the internet has hit sales yet – obviously with evening newspapers you have a hard core of the population over 30-40 buying. It's an ageing demographic, so the fall will be quite gentle, but it may become steeper in a few years when those people have died off and the younger people that should've been brought in are just going online to get their news.

“Synergy” between the web and print products:

In line with the rest of the industry’s senior management, our senior source at Johnston underlined their commitment to offering synergy between online and print products. He also claimed that this aim had been important in winning around initially sceptical sections of the workforce:

Older reporters viewed the whole thing very cynically and were sceptical about the positive effects it would have. They thought it would be a drain on resources, they thought it would be the end of the newspaper, they didn’t see the benefits of video, they feared that resources would be taken away from the newspapers and ploughed into the website. But what we’ve tried to do where possible is cross them over to use resources across both platforms.

Staff informed us, however, that while they agree with the idea of making connections between the different platforms in order to exploit the best of both, what has actually happened has been much more one-sided. They fear that the much-hyped commitment to synergy all too often favoured promoting the web at the expense of the newspaper, and that a web-first strategy might damage future newspaper sales.

It’s great to have stuff up on the internet, but when it’s going up there before the paper comes out in the morning, it’s just crazy. **In the newspaper we have lots of online links saying things like “go online and see such and such”, at the end of every story we have online links. And yet when you go on the website there’s nothing at all linking to the newspaper print edition. Everything is one-way traffic and people are quite upset about that.** People are starting to get restive. Sales are down, obviously, but not worse than everyone else. But someone who’s fairly switched-on to the internet will be sitting at work and wondering how the local football team are getting on. They’ll go online, get all the news, then when they go home they just would not buy a paper.

Worker reception of the changes:

Our Johnston management source admitted that there had initially been some worker resistance to the plans, and that in some quarters the online project was viewed with suspicion. But he claimed that once it was up and running attitudes soon changed:

We found at the *LEP* that a lot of the people who were treating it sceptically are now wanting to get involved. They thought it was a threat, and they’re now coming to realise it’s an opportunity to learn new skills, but also, I think they’ve seen the figures that print circulations are down whereas the website’s gone up.

An editorial staffer at Johnston echoed this largely positive characterisation of the multimedia pilot scheme:

The view the journalists took when they told us they were introducing this was, hey, lets not be Luddites, lets have a look at how it works and what extra work it creates, and to be honest quite a few did fancy being able to use the internet more. We've been really supportive, there've been a few technical problems, but that's inevitable. We've stuck with it, and most people are quite pleased.

The main problem as far as staff are concerned, however, is that they feel they have not been properly compensated for the new duties and extra work they are now doing. He told us, "We really would like more money for the extra work we do", and continued:

Nobody at our place has been forced to take a video camera out or anything like that. It was entirely voluntary and if you wanted to learn new skills it was up to you. They have also said, though, that they're not giving us any extra pay to do all this. Now there are people who've done this that are more skilled-up than some other members of staff, but they don't get any more pay for the trouble. That's a sticking point.

He concluded on a note of resignation, telling us that even though no new money was likely to be offered for online duties, staff are at least relieved that because of the extra work that has been created in the "newsroom of the future" it was unlikely Johnston will be making any more cuts in the near future.

We're quite pleased that it's generated quite a bit of work to be honest, because we can't see them getting shot of loads of people and still being able to do what we do at the moment. They could do a dumbed-down version putting stuff up un-subbed, but they'd damage the product then, and it wouldn't be accurate or readable.

6 The 2006 Multimedia Strategy at Trinity Mirror

This chapter examines and explains current Trinity Mirror and Western Mail and Echo multimedia strategies with reference to public company documents, speeches and presentations by senior management figures, an interview with Trinity's regional head of multimedia, as well as a number of company policy and planning documents obtained from Western Mail and Echo.

After enjoying a virtual monopoly in the local and regional advertising market for many years, Trinity Mirror along with its competitors is worried about increasing competition from the new media sector. **Central to its recent strategic review on the future of the company is the “adoption of a new technology led operating model across the group to accelerate growth and reduce costs”.** The effects of this new business plan will be numerous, but in the regional newsrooms the key changes will relate to the company's plans to **“drive revenues by increasing our advertisers' reach through access to powerful multi-media platforms”**, and, more critically, to **“streamline editorial processes to allow more extensive and efficient multimedia publishing”** (Trinity Mirror 14th December 2006).

One potentially problematic outcome of this strategy may be that the creation and maintenance of these “powerful multimedia platforms” will have to be achieved by already over-stretched journalists with little or no extra staff or resources. Indeed, given the company's ambition to deliver “additional annualised cost savings of £20 million by 2008” while maintaining healthy payouts to shareholders, it is difficult to identify sources for any significant extra investment in online news.

Sly Bailey's recent speech to the Cardiff Business Club was rhetorically strong on its commitment to embracing change and leading the way by developing online news, but weak on discussing specific strategies, or detailing how the company might pay for these substantial changes. “The extraordinary pace of technological development, in particular the explosion in broadband uptake, has swept away the old certainties, and there is little doubt that some ‘old media’ companies will eventually be swept away with them. Trinity Mirror does not intend to be one of them”. She continued, “how newspapers, TV companies, radio stations, and magazine publishers respond to the digital challenge will determine whether – long-term – they stand or fall” (Bailey, 2007).

After this cautionary note, however, she continued in a more defensive tone, saying that she believed the threat of the internet should not be overblown, and that the current advertising downturn was only temporary. “I don't wish to sound complacent. We are not. But to focus solely on threats as opposed to opportunities would be a huge mistake [...] **If you listen to the armchair critics you'd be forgiven for thinking that it was all over for the traditional media”.** Referring to the continuing decline in newspaper circulations she claimed **“I'm not bleating about it. It's something we have to live with. But I want you to understand that what is**

written about us and our history is often based on few facts and scant understanding” (Bailey, 2007).

Michael Hill, Trinity’s new regional head of multimedia, was able to give us more details. He mentioned the importance of integrating print and internet news to achieve mutual complementarity, the merits of including video content on the *IC* network of websites and implementing web-first editorial policies, as well as the need to engage readers with interactive content, blogs, and opportunities to produce citizen journalism. Like his employer he does not believe the internet will have an adverse effect on print sales:

It’s very early days, but [newspapers] have to change and accept that we will be walking hand and hand with the web. How we do that exactly, and how the different elements that exist at the moment in print newsrooms fit into the web, we’re trying to work out what’s best, and how best to fit that in, as is every other newspaper group around the world. [...] We’re in a real fantastic experimental phase, and it’s a great time to be a journalist.

In conversation with us he struck a conciliatory and persuasive chord when describing how he envisaged the company’s multimedia policy changing journalists’ working conditions.

We’re asking them to take small steps at the moment, to learn multimedia, to learn how to use video cameras, to learn how to use audio devices, and then learn how to tell those stories they’re getting in those different media, whichever is appropriate. It’s not a question of sending a reporter out on a story, to write a print version, record a podcast, and produce a video and a picture gallery – it’s a question of looking at what’s the most appropriate medium for a particular job and making sure that the reporters have the skills to be able to carry that off.

But Hill insisted that journalists had to accept the inevitability of change arguing “the key is that people are now used to getting stories and consuming media in different ways. We as print journalists have to adapt to that, and all staff have been asked to understand just how much the web has changed the process they’re involved in”.

In a recent conference on citizen journalism at the University of Central England Hill was much more bullish in his assessment of the future of printed news, and in his derision of editorial staff who entertain reservations about Trinity’s online policies. He spoke of a “garlic bread moment” for the local press, when people would have to realise that new media and citizen journalism are “the future”.

“We have to accept that breaking news online has to come first,” said Hill, a step he suggested that some journalists were finding hard to accept. He explained that one sceptic had protested to him “Why kill the goose that laid the golden egg?”. “The goose”, he replied, “has got bird flu”. After this proclamation of the terminal illness of Trinity’s printed news products he went on to describe the process of modernising the company’s newsrooms and re-training journalists as

“like turning round an oil tank”. Some staff, he stated would just never understand, “but they’ll do what they’re told to do” (Hill, 2007).

A considerably more detailed picture of the multimedia strategy emerges from an analysis of Trinity Mirror’s plans for Western Mail and Echo.

6.1 The 2006 Multimedia Strategy at Western Mail and Echo

2006 was a preparatory year for Western Mail and Echo, in which the groundwork was laid for the transition to more extensive multiplatform news production. Management operated a “drip-drip” strategy of very gradually introducing and piloting digital media content. Traffic on the websites continued to grow year on year. September’s traffic on *IC Wales*, for example, was measured at 2,383,466 page impressions with 320,833 unique browsers visiting the site 608,475 times in total. Traffic on *JobsWales* reached 931,960 page impressions and 38,827 unique browsers. These figures should not be judged to be wholly reliable, as the company has, as yet, not released ABC Electronic audited readership figures. Taken as a limited snapshot of usage, however, they do indicate that readership of *IC Wales* is still quite low and visitor levels to the classified sites even lower.

During the first half of the year the company re-branded its classified advertising sites as *HomesWales*, *MotorsWales*, and *JobsWales* in order to make them complementary with its printed newspaper supplements. These sites boosted digital advertising revenues overall, prompting Managing Director Keith Dye to state:

We are leading the way in terms of the amount of digital revenue we’re bringing into the business. If you take advertising revenue last year, 5.2% of the advertising revenue has come from Digital. That’s something we need to keep growing. Longer term, we want to build that up to around 20%, and it’s going to become increasingly important.

He went on to explain that the company was now selling advertising purely for the web, and not only as tie-in deals with existing newspaper advertisers. “Until about a year or 18 months ago we only sold digital to people who were also buying print, and asking if they’d also like to do something online. What we’re now doing is going to people who may not want to buy print and selling them online only” (Dye 2007).

By the end of the year all company newspapers (daily and weekly) were available online in subscription-only e-editions. Dye described them enthusiastically, but emphasised that the print editions were ultimately “better”, and that e-editions would be most useful for people with no access to the printed papers:

You can turn the pages, you can look at double page spreads, single page, you can scroll through the content, whatever you want. That’s uploaded on the internet simultaneously as our plates are sent to press. So when our papers hit the newsagents you can also get the e-edition. If you can get to the newsagents or get it delivered it’s actually better to use the print version. What this is aiming at is

allowing expats to read our newspapers [...] it enables people who are not in Wales to read the newspapers. (Dye 2007)

Other moves include a number of blogs launched on *IC Wales* (including one from the *Echo* sports desk); a podcast and video clip of an interview with former Welsh rugby player Barry John; a tie-in from the Celtic Weekly “Battle of the Bands” competition which saw MP3 files of songs posted online; and a pilot mobile phone SMS picture service for the *South Wales Echo* that allowed readers of the newspaper and website to submit photographs from their camera phones by text-message for publication on the web. The overwhelming majority of pictures submitted so far have been portraits of readers’ cats and dogs.

6.2 The Future of Online News at Western Mail and Echo

2007 is set to be “the year of digital” at Western Mail and Echo, and a number of very significant changes have been proposed. By far the two most significant of these planned changes for journalists, though, will be the move to an online-first editorial policy and the introduction of video journalism, both of which are addressed in more detail in separate sections below.

Managing Director Keith Dye’s plans for the company’s internet sites are ambitious. **In Dye’s words, the company sees the web as an “opportunity to own the whole of Wales with the IC brand”.**

In early 2007 the *IC Wales* website will be redesigned and re-launched to streamline its architecture in readiness for the development of more web content. There has been heated debate within the company about whether the existing print “brands” (the *Western Mail* and the *South Wales Echo*) should also be used online instead of or alongside the *ICWales* moniker. No final decision has yet been made on this, but the general feeling among senior managers at the company is that the website should not be limited by the preconceptions people have about the newspapers. Keith Dye stated recently “our print brands have boundaries, and they have gaps”, and that:

everyone has ideas about what the *Echo* and the *Western Mail* are and they buy it or they don’t buy it. What we want to do now is push into a much wider area. The second point is that if our competitors, like the BBC, are going for all-Wales we need to go for all-Wales. And the third point is that [with] dozens of websites using all the individual titles you just end up with a huge brand soup and you can’t get a clear message across. (Dye 2007)

He went on to outline his vision for a website that would rival all-Wales online news providers such as BBC Wales:

Once we’ve got the changes made to *IC Wales* and we’ve had the redesign, then we want to go forward with a really big advertising campaign to get across to the people of Wales that if you want to know what’s happening across Wales whether it’s news or advertising or whatever, our website is the place to look.

Some in the company have pointed out that this vision of a Western Mail and Echo-dominated all-Wales news website might be more than somewhat “South Wales-centric”. Indeed, to see *ICWales* as a national news portal conveniently ignores the existence of Trinity Mirror North Wales’ website *ICNorthWales*. There is no indication to date that the two Trinity subsidiaries have any plan to co-operate in a shared online news project to counter this anomaly.

The company’s general plans for future online content are detailed in a Western Mail and Echo internal document signed by four senior newspaper editors entitled “Multimedia Strategy and Video Journalism”. This paper further outlines some of the thinking behind the new online strategy, and details some of the short-to-medium-term effects it will have on journalists’ working practices in the group.

It begins by describing a “media landscape” that is “changing faster than at any time in living memory”. It continues:

All branches of traditional media – print, radio, and TV – are converging on the digital space. Radio stations are broadcasting moving pictures over the Web, the BBC are trialling an ultra-local TV service with the aim of spreading it across the UK, ITV are developing local classified web sites. Digital newcomers – search engines such as Google and Yahoo, and online classified sites like Craigslist – are invading the territory that for decades has been at the heart of local and regional newspapers. (Western Mail and Echo Ltd. 17th November 2006)

It is clear from the second part of this list that the “territory” being “invaded” is the commercial advertising revenue that has been a crucial cash cow for the company’s financial viability for so long.

In common with other journalists’ experience, reporters at Western Mail and Echo dailies will be expected to retrain in order to “produce content for a range of media” (Western Mail and Echo Ltd. 17th November 2006). This will involve the production of material for video reports for publication on the web, radio pod-casts such as those pioneered by *Guardian Unlimited*, news content for mobile phone subscribers, and interactive publishing tools such as blogs, message boards, email newsletters, and chat rooms.

6.3 The Web-First Editorial Policy at Western Mail and Echo

The commitment to a web-first editorial policy is summed up in the following statement from Keith Dye:

We’ve started to look at ways in which we can use print and online to complement each other, because, no matter what you print and how many editions you do, print is produced by definition at a set point in the day or night. Digital on the other hand can be modified at any time of the day or night. So we’ve got an opportunity here to

enrich the proposition that we offer to our readers. And increasingly they will expect to be able to track news by a combination of print and digital. (Dye 2007)

The company is committed to “recapturing breaking news” in its news, sport, entertainments sections, becoming the first point of reference for readers, and providing complementary print and “live” online news. In practice this means that news desks will have to re-organise to provide web copy “on demand”, and that the print product will change its emphasis to become a secondary “follow-up channel providing context and depth” (Western Mail and Echo Ltd. 17th November 2006).

The technological changes needed to implement the strategy chiefly involve the installation of new technology: Italian firm Terra’s cross-media GN3 publishing system. A proposal has been made to Trinity Mirror central office, and a decision has yet to be made, but it is hoped the system could be up and running in Cardiff by early 2007. Dye explained:

What currently happens is that we have an editorial system that was designed before the digital age, so effectively our digital website’s content is uploaded separately in a quite clunky manner. GN3 allows us hugely more ability to the editorial departments to be able to direct content to the website. (Dye 2007)

Dye is enthusiastic about the possibilities offered by the system. “If we put GN3 in two things will happen”, he says, “One, we can do a lot more than we currently do. It’ll allow us to publish an awful lot more information, it’ll allow us to publish it more quickly, and it will give us a lot of control back”. He also believes that the time it will save will free up human resources in the current digital team that can be used to cover the extra work created by the digital plan. He is keen to point out that these recently freed resources will not be used to turn a quick profit – present digital staff will not lose their jobs – they will be used to improve the design of the online product. “Secondly”, he continues:

it will release resources, and our plan is not to use that to cut costs or that we don’t need to have as many staff as we have now and scale back. We’re not doing that. We want to keep that resource and it’s important we have that resource freed up to be able to operate more. Over the last year we’ve grown our digital teams, we’ve expanded the amount of people we employ in advertising, and we’ll continue to look at that. (Dye 2007)

He goes into much more detail on exactly what kind of work he envisages the web team doing instead of the work which takes up much of their time presently.

What GN3 will also do is free up our digital team from some of the mundane repetitive daily maintenance that goes on just in order to keep the site up to date – huge chunks of that are going to disappear. [...] And that means we can start to look at how we design our websites more, and how we can develop our commercial

opportunities. So it really is a win-win. It makes the production of news on the website massively simpler, it gives people who are directly involved with digital more time to develop and refine what we do. (Dye 2007)

What this talk of newly creative design and improved advertising possibilities does not address, however, is the considerably increased workload that will be created for *editorial* staff at Western Mail and Echo when they expected to become multi-platform content providers.

6.4 Video Journalism at Western Mail and Echo

In November 2006 the NUJ chapel at the Cardiff Newsroom placed a moratorium on its members co-operating with video journalism training, and management has yet to respond to this action with alternative plans. But despite this human resource difficulty, it is clear from the managing director's comments in his annual presentation to staff, that he believes the provision of video content is still central to his multimedia plans. He stated as recently as February 2007 that "the GN3 system will help to facilitate video journalism". And that video content was "something that we see becoming an important part of the newspapers".

Over the next year it is stated company policy that a limited number of staff will undertake video journalism training. Volunteers will be sought from news, sport, and features sections, and training is expected to commence in the first quarter of 2007. The training required to implement the first phase of the multimedia strategy will include instruction in "shooting and editing video, pod-casting, [and] uploading material to [a] digital Content Management system", but these plans are constantly under review, and are liable to be added to as new "content channels" are developed (for example, providing news by SMS to mobile phones).

The policy does not detail the exact numbers of staff required to assume these extra duties, nor how much extra work will be needed, but it states that initially it is intended that the number of staff involved will be "a minority", and that "only a handful of newsroom staff on each daily title would need to use these skills". On the workload involved it states that "**we plan to produce a limited amount of staff-generated video and audio initially – perhaps two or three clips daily on larger titles – to gauge what types of content work best [...] and to measure the level of user interest**". However, it adds, newsrooms "will gradually increase their output over time". Evidence from the testimony of practicing video journalists at Trinity's pilot newsrooms suggests that even this small amount of video content would create significantly more work. **A well constructed video package can take a whole day to produce, so two to three a day could mean two to three journalists being diverted from the printed newspaper every day.**

The company is keen to downplay the changes that the workforce is expected to make to accommodate the new plans. It maintains that "for the vast majority of staff, there will be no change to working patterns", and that only a minority will experience any change in the way they work. It is also makes clear that no extra money will be

available for those taking on the new responsibilities. The reasons given for not paying journalists for their new duties are:

- 1) the relatively small number of people asked to do the training at this stage, and the relative infrequency of the new work
- 2) the fact that everyone doing the training will be volunteers
- 3) that those doing the new work will still work the same hours, just filled differently
- 4) that acquisition of these new skills will “upskill” participants, giving them enhanced future career prospects

However, the logic behind these propositions is questionable, and the rhetoric used to sell the strategy to the workforce elides a number of key points. First, it is highly unlikely that working conditions will not be affected adversely by the new policies. It is stated repeatedly that the new work will be carried out by volunteers from the existing pool of staff writers. There are no indications that more editorial staff will be hired either to do the new work or cover the existing workloads of those editorial staff members who will produce the extra multimedia content. It is unclear how the introduction of new work can result in anything but an increase in workload either for those that take on the new duties, those that have to take on the work previously done by the new multimedia journalists, or both.

Noting the “relatively small” number of people involved, and the “relatively infrequent” nature of the new work does not mask the fact that the same number of workers will be expected to do more for the same pay. It should also be noted that the work may be ‘relatively infrequent’ at the start, but given Trinity Mirror’s longer term strategy of **producing “extensive and efficient multimedia publishing”** (Trinity Mirror Plc, 14th December 2006), and its plans to **build multimedia skills “into the core training for all new trainees”** (Western Mail and Echo Ltd., 17th November 2006) this can reasonably be seen as the thin end of the wedge.

The fact that those undertaking the training will be volunteers is an unacceptable reason for not providing any extra premium. In a competitive, high-pressure, working environment that has suffered from a period of prolonged job-insecurity and a relentless senior management “rationalisation” strategy that has triggered a 35% reduction in overall staff since 1999, reporters could be forgiven for feeling they have little choice but to “volunteer” for more work for no reward.

The final two points can be criticised on similar grounds as the others. To suggest that those who work on the new digital content “will still work the same hours, just filled differently” is confusing. It is difficult to understand how any extra work without added manpower can result in anything but longer hours or a lower quality news product overall; opportunity costs are endemic here. And finally, expecting journalists to accept “upskilling” as adequate compensation for an increased workload is similarly unhelpful. Providing workers with opportunities for the acquisition of new skills is an integral part of any mutually beneficial employer-employee relationship, but to attempt to substitute training for fair payment is unacceptable.

The move from the traditional newspaper format to a business plan which protects the newspaper product, while also diversifying into multimedia

platforms is as necessary as it is inevitable in the digital age. But this move has to be properly planned, staffed, and resourced, and cannot be achieved successfully, as one reporter expressed it eruditely, “on the cheap”.

7 Western Mail and Echo Editorial Staff Responses to the 2006 Multimedia Strategy

This chapter outlines and explains Western Mail and Echo editorial staff members' concerns about the proposed introduction of the company's online news strategy and outlines the union response to the plans. It draws on semi structured interviews with Western Mail and Echo staff, NUJ officials, and the results of an e-mail survey of opinion in the Cardiff newsroom.

A large majority of editorial staff at Western Mail and Echo newspapers do not blindly oppose the move to online journalism. **86% of respondents to our survey said they believed the future of the local and regional press involves online news and multiplatform journalism.** Only seven respondents disagreed.³ This is among the clearest and most striking findings from the questionnaire-based research for this study. Consequently, to characterise staff scepticism towards multimedia policies as backward-looking or Luddite would be entirely wrong. If there is a note of scepticism in the tone which some respondents adopt when discussing the changes, this is perhaps understandable given the many job and resource cuts made by Trinity Mirror in recent times and the subsequent low morale prompted by a feeling of being overworked, underpaid and undervalued

Staff express strongly held and widespread disagreement with the plans, and anticipate that they will be badly implemented, but most dissent is much more layered or nuanced than Trinity boss Michael Hill's dismissive "oil tanker" analogy implies. Objections to the proposals identify five broad but related areas of concern:

- 1) **Resources** – appropriate human and other resources must be provided by Trinity Mirror to implement the proposed changes satisfactorily.
- 2) **Workload** – the already heavy workloads of existing staff should not be increased further to cover the inevitable expansion of content that the move to digital will require.
- 3) **News quality** – the web content should be of equal quality to print, and the extra work created by producing online news should not affect the quality of print products.
- 4) **Training** – adequate training should be provided, especially where journalists are expected to acquire the new skills needed to produce high quality audio-visual news.
- 5) **Remuneration** – new skills and additional or more demanding work should be rewarded appropriately.

³ Surveys were sent to 130 members of the Western Mail and Echo NUJ Chapel. All percentages refer to proportions of the final sample of 51 survey respondents.

Resources:

One of the most widespread and unequivocally expressed fears about the move to digital is that the company will attempt to implement its plans without adequate investment and without employing sufficient (or indeed any) additional editorial staff to implement the changes effectively.

Feelings on this matter are very strong. **Almost all respondents to our survey, a massive 96%, suggested that more staff should be hired to cover the extra work created by additional online demands.** But reporters are very sceptical about **whether their concerns will be dispelled by additional resources. 88% of respondents, a similarly large proportion, believe that the multimedia strategy will not create any additional jobs at the company.** By contrast, only two respondents said they thought extra staff should not be hired, while six respondents believed that the strategy would create more jobs in the short to medium term.

A local representative of the NUJ summed up the mood succinctly:

I've got no principled objection to any of these developments. However, my very serious concern is that nothing will be properly resourced, and that any moves that they seek to make will be done at the expense of the core products of this company, which are its newspapers. As in 2000 they're in a situation where they're toying with the internet without really knowing what they're going to do with it. But having had their fingers burned a few years ago they have now gone to the opposite extreme and are saying that this time we don't want to invest anything in this at all.

Another reporter told us, with an air of frustration, "I wish they would be more upfront about what the company is planning to do. It's not as though the staff are dead set against digital journalism, they just want to be involved on what they'd consider to be a level playing field". Echoing the sentiments of almost everyone we spoke to at the company, he continued, "paramount in most people's thinking is the idea that if we're going to do this we have to do it properly, and in order to do it properly we have to be resourced and staffed properly". Another told us, "I simply cannot see newspaper journalists having to time to implement this, certainly with the resources we have now", and continued:

If you look at where multimedia's has been successful, it's places where there has been huge investment. Look at the *Guardian*, look at the BBC. It's the only way. And at present, the way the thinking has been going up until now from our managers and the executives at Trinity Mirror, their attitude has been entirely the opposite. Everyone knows there've been cuts in editorial not growth. There's no money on the table at all for this.

Yet another reporter commented, in a similar vein:

How do management in Trinity Mirror envisage it working? We don't know for sure yet. If they want it to work properly it has to be

resourced properly, and I don't know from an editorial or journalistic perspective that what they want to achieve is attainable given current staffing levels, and indeed resource levels in general.

Managing Director Keith Dye contends that adequate resources will be freed up by the Terra GN3 computer system, which will mean the online team no longer have to manually upload stories to the internet. Many employees see this argument as a red herring, pointing out that the bulk of the extra work will be centred on producing editorial content, which cannot be done by a team composed mainly of graphic designers and technicians:

What they seem to be talking about is simply using people from *ICWales* who will be freed up by the new GN3 System, so instead of having to do manual transfer of copy online, what they'll do in future is because of the ability to do that automatically somehow these people will be freed up to work on the web. But they're graphics people mainly, with only a couple with journalistic experience.

Journalists' suggest, for example, that the current digital team would not be able to shoot and edit the proposed video content. *Western Mail* and *Echo* employees are at a loss to understand who will be expected to produce this audio-visual content. "If you don't have the people to do the main job of filling the newspaper," asked one source, "how on earth can you thin the resources even more and produce online video as well?"

Members of the current digital team have similar concerns over the plans for GN3. One told us, "as a member of the *ICWales* editorial team I can see the sense in forging closer relations with the newspaper editorial staff. In the case of the *Western Mail* and the *Echo*, however, the proposed strategy is to remove the current *ICWales* editorial team to work on 'commercial projects' and hand control of the web site content over to the already overstretched newspapers teams". As well as believing the current web team will be used inefficiently in future, this member of staff believes that too much is expected of GN3's capacity to do the job in hand. It is unable to undertake the sub-editing job that is required, for example, (and currently conducted by *ICWales* staff) before a print story is suitable for the website:

Managing the content of the website is a time consuming job. Most articles don't arrive on the *ICWales* site in a usable format, if they arrive at all. Headlines and teasers have to be subbed or completely re-written to make sense to a web audience. Sidebars have to be added to main stories, nibs split up, links pasted in to related articles, forums and message boards monitored. While the introduction of the proposed new GN3 system may cut down some of problems the fact is with newspaper teams already under pressure and a high turnover of temporary staff – particularly during the summer months – there is no way of obliterating them completely. A team will still be needed to manage the content once it's live on the site, and it would make more sense if the web team were integrated into the newsrooms, and not into the company's commercial departments.

It is unlikely, then, that GN3 can provide the answer to Keith Dye's resource-allocation problems.

Fears over resources are not limited to overstretched editorial staff. **Although publicly supportive of the company line on internet video content, there is a strong feeling that many senior editors are privately unconvinced about the policy.** "I know that the editors themselves are really concerned about the implications that this could have on the papers from a staffing point of view" said one NUJ representative in Cardiff. Another went into more detail:

I think the editors, if the truth be told, are themselves reluctant to do this, even though publicly they couldn't say that. I'm pretty convinced that they are reluctant to do it because they know the pressure on resources already. They're the ones who've had to implement the cuts over the last few years. **They're as aware, if not more aware, than anyone what the implications are of trying to send people to do video journalism for the website as well as produce copy for the news papers. They don't want to drive this because they know the implications.**

He went on to say that the fact the video journalism plans have not progressed since their announcement in late 2006 can be explained by a pragmatic message being passed back to group managers in Canary Wharf by editors in South Wales:

At the moment things are as they have been for a while. There's no change, no training being done, no resources being put in that I'm aware of. It's all on hold. I don't know whether there's something happened which is holding that up. My feelings are it's probably just a sense of realism which has come from the editors telling managing directors locally, and that getting back to people at national board level, that unless you properly invest in this it's not going to happen.

Workload:

The main consequence of Trinity Mirror management's continued parsimony and refusal to bankroll its own news content is that media workers' now work harder, and for longer hours than ever before. Many see the introduction of online as an excuse to make them work even harder. **86% of respondents to our survey stated that they thought the online plans would mean more work for them.** One NUJ official told us:

They haven't given us any formal proposal on this yet, but I imagine what they want is for people working on the papers to also be producing material for the web. Now, [...] the idea they'll be able to screw more work out of these people is ridiculous. It's not going work. It'll be a half-cocked measure that's not going to be impressive.

Another told us baldly, "Going by what one hears talking to my colleagues in the office people would be seriously reluctant to take on more than they're currently doing". Talking to journalists at the Cardiff newsroom one feels that a mood of

genuine concern and unrest is developing, and that much of the workforce is unwilling (and unable) to take on any more responsibilities. The same source continued:

It is not something that is achievable on existing human resource levels. It can't or it won't be done because existing staff will see it as a step too far. It's not that they don't want to do it [...] it's that they can't do it. They're just gonna say I've got 20 million other things to do, there aren't enough hours in the day, I'm not getting enough sleep, I don't think I'm being paid nearly enough to do this anyway never mind the fact that they want me to acquire extra skills.

Video journalism, it is feared, will cause the lion's share of this increase in workload. Our NUJ source continued:

Our very strong fear is that if they were to move ahead with this in any significant way they would not be putting the resources in and employing more people to do the videos. They would be taking people out of their existing work to do the video stuff, leaving the rest of us to fill the gaps and do the work they would have been doing if they weren't making videos. Given that we're already cut down to the bone in terms of staffing levels anyway, we think that is absolutely crazy.

As is shown by the case studies from pilot digital newsrooms below, this fear is borne out by the experiences of those already implementing the video journalism plans.

Quality:

Journalists are concerned that the move to multiplatform journalism will affect the quality of the news in a number of ways. Firstly, they fear that established print products will suffer when human resources are reallocated to the production of online news; and secondly, they worry that the content produced for the internet will be substandard, an outcome which could damage the reputations of the newspapers by association. A local NUJ source explained:

I don't think the people at Trinity Mirror understand the difference between what's required from the web and what's required from a newspaper, and how much additional work is going to be produced. They're so obsessed with the potential advertising from the web they can't see that they've got to protect their core product. If you've got the same number of journalists writing for the web and the newspaper then inevitably the newspapers are going to suffer.

Another source inside the company said:

There has to be a realisation that if they're serious about this, as we as journalists would like to think they are, it's not something they can do on the cheap, and they have to front up with some money

because if they don't and then what is produced is subsequently seen by readers, viewers, listeners, and advertisers, as being half-baked they won't come back to us at all.

An NUJ source also spoke of the high quality of the online news competition in the region, implying that a cheaply produced inferior news website would not win over many readers. He told us, “the whole point of the web is to provide excellent quality content. **At the moment we've got BBC Wales offering very high quality content and a load of people working on the website to produce their stories. People interested in getting up-to-the-minute news, just tap into that... and it's a very well resourced operation**”. This is a prescient point, given Western Mail and Echo managing director Keith Dye's plans to go into competition with the BBC's widespread online news coverage, and to eventually “own the whole of Wales with the *IC* brand”.

Video journalism is central to many journalists' quality-related fears. The time video clips take to produce is of concern to many. It is fair to assume that reporters working on video packages for the website will be unable to produce as much print copy as they could previously. One staff reporter at the Cardiff newsroom said:

I can see that generally newspapers are moving much more towards online, but it's all about resources. It's OK people learning additional skills, but if someone is doing video work then that impacts on their colleagues. That slack has got to be taken up by someone else. Some of this video work can take all day, so that's one person out of the newsroom that could've been writing for the newspaper. One or two video clips seem to me to be worth two to three page leads and maybe five to six shorts as well. That's got to affect the papers.

As well as the potential impact on the quality of existing newspaper products, it is widely felt that the standard of the work produced by the new video journalists will be unimpressive. Another journalist said:

I've seen some of the clips that have been produced at some other Trinity Mirror centres, and [...] the quality is really exceptionally poor. From a filming point of view it was clearly the work of amateurs. In terms of presentation, as well, the way people were reading stories out in a monotone was just risible. I can't imagine any ordinary member of the public getting anything out of it. There didn't seem to be any kind of added value there at all.

He continued, “it just reflects very badly on the newspaper companies producing this stuff”, before going on to further explain that one poorly produced product is enough to tarnish the whole company by association:

We are very concerned about the issue of quality, because the newspapers have got a certain reputation, and if the quality of what's put on the web is low it's going to damage the reputation of the company and of the newspapers. Readers will go and look on the

website and if the quality isn't there they will just say these people are a bunch of amateurs, and if they can't do this right we can't trust them to do print journalism right either.

Another journalist argued that advertisers, as well as readers, would be deterred by poorly constructed and presented online news. **“I think the multimedia strategy only has a chance of success if it looks professional. If there is any corner cutting on getting video material on the web it could seriously undermine the brand. Why would anyone pay for or invest advertising expenditure in something that looks shoddy and could be put together by anyone with a video camera and a spare five minutes”.**

The other major quality issue foreseen by journalists at the company involves the introduction of the Terra GN3 publishing system and the move to a web-first editorial strategy. Employees worry that if all (or even selected high quality) stories are published first on the internet there will be no incentive for readers to buy the *Western Mail* or the *South Wales Echo* One local NUJ official stated:

During one of the sessions that Keith Dye the managing director gave recently he said that there wouldn't be any more scoops for the paper, that if we got a scoop it would go immediately onto the web. If it's going on the web what the hell are we going to put in the paper to make people go down to the shop and buy it?

His incredulity is echoed in the opinions of many of his colleagues, one of whom commented:

Why do people want to buy newspapers? They buy newspapers because they want to read something different to what they can get elsewhere. Now if we're going to be putting our best stories on the internet before they get published in the newspaper, then what are we going to get published in the newspaper? If everything you've got is already out there inevitably other news outlets will pick it up, and by the time the paper comes out the following morning things will have moved on.

Our NUJ representative continued:

It just seems to be a crazy strategy that is ill-thought through. What they want to be able to do is to go to advertisers and say we're going to have this super-duper site where all the good stories our reporters come up with will immediately be put up, and that means everybody will want to visit our web site so it's worthwhile your advertising on it. But I think that is fanciful, and it will cause untold damage to the papers. You have to ask yourself whether they want to have newspapers in the future?

This question might seem dramatic or hyperbolic, but in the context of Trinity Mirror's continued cuts it is valid. Another Cardiff reporter expressed a similar view, “I'm a newspaper man, and obviously I think that the newspaper should be the main

product. But to be honest I think they worry less about circulation these days than getting the advertising in, and the web will just be an extension of this". A union source concluded on a note of caution about the uncertain future of internet news and the perils of abandoning the company's core print products entirely:

The levels of revenue they've been able to get from newspapers have been very high, and there is nothing that leads one to believe that if in the future they ditch their newspapers they'll be able to get anything near the same levels of revenue from the web. So instead of seeing the web as a promotional vehicle for the newspaper and promoting the paper with tasters on the web, they want to do the opposite.

Training:

Members of staff at the Cardiff newsroom are very concerned that they should receive adequate training and preparation for the move to digital news production. The area of most concern is the training offered by Trinity Mirror to potential video journalists. One reporter explained:

Anyone who was going to do video work would have to be properly and thoroughly trained. [...] It's not sufficient just to have a short course where you're taught how to use a camera. That is just ridiculous. It's a whole new way of operating, and there's a big leap between being a print journalist and being a broadcast journalist. People go on quite long courses before they're let loose when they transfer from one medium to another.

Employees from other newsrooms who have been trained as video journalists have had largely positive experiences, although many admit that the courses are too short to enable them to learn any more than the basics of video news production. One reporter, who had been on a 2-week course at the Press Association's training centre in Howden, told us:

The two weeks consisted of training to use the cameras, and covered how you'd start using your camera to start putting together news clips for the web. Nobody was telling you how these skills would be used for regional newspapers on the web. It was very much kind of these are the skills, now you've got to go and thrash out the best way to use it yourself.

He continued:

When I was training on the course I had huge concerns about the amount of time that it was going to take to create the video pieces. If there is going to be a wide-scale roll-out of the video journalism there are going to be have to be more resources put into it. Because it's just not practical. Either the quality of the newspaper, the printed product, is gonna take such a dip that it becomes unacceptable, or

you're going to end up with video journalists working 24-hour days. Neither of which are ideal.

Remuneration:

Another key area of concern is pay. It is imperative for most of the journalists we spoke to that extra work and new skills should be rewarded with increased pay. A local NUJ official said:

It's quite normal in other industries that if someone learns something new they will get extra money in recompense. You can't imagine a situation where fire fighters have learned a set of new techniques and are not going to be rewarded for it.

It is clear that this opinion extends to rank and file members. **84% of survey respondents said that they saw lack of additional pay as a disadvantage to training as a video journalist.** One reporter told us, "as we are already on a very low wage I worry that this work will increase my workload and I will not be financially recompensed for any new input". Another echoed this opinion, "I appreciate the way the written press is going (video, podcasts, and so on) but for me it's not the reason why I wanted to be a print journalist. I think if I do have to start doing pieces of video an increase in salary should come with it". Another reporter we spoke to was more enthusiastic about multimedia journalism, but was equally insistent that she should be adequately recompensed for additional work done and news skills learned:

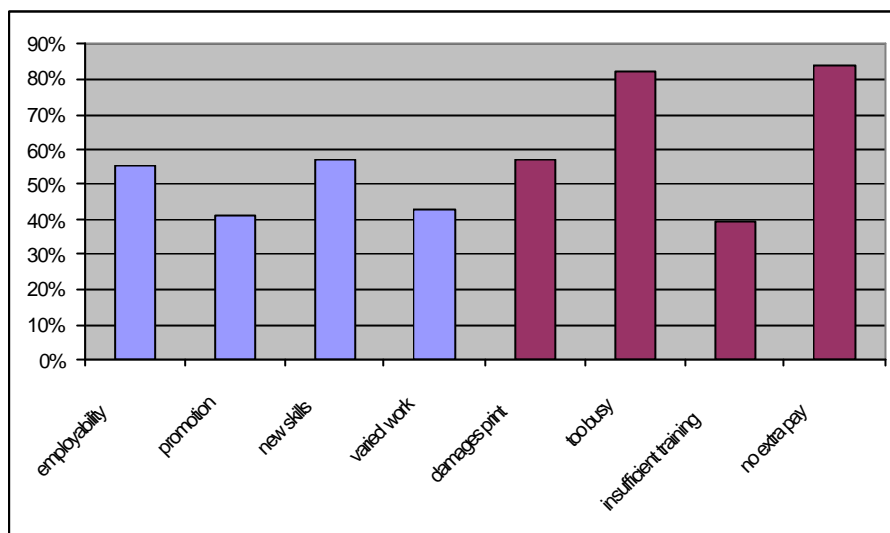
It is necessary to use the internet to accompany print editions of newspapers to survive in the future, but journalists (who are very underpaid already) should be given financial rewards for extra training and more staff should be employed, otherwise the future of journalism as a career is bleak.

7.1 The Current NUJ Position on the Western Mail and Echo Multimedia Policy

There has been a policy of gradually introducing increasing multimedia and interactive content on the *ICWales* website for a number of years, but until mid-2006 management had encountered no significant union opposition to its digital media policy. This changed in April 2006, when NUJ officials were made aware of plans to train journalists in the production of video for the internet. In the words of a local union official, **"we weren't happy about that because there'd been no consultation with us at all, and clearly the idea of getting reporters to create video for the web is a very major departure from what people do at the moment, and from what people have been trained to do"**. He continued, "we've all been trained in print journalism. We're not broadcast journalists and we're not cameramen. It's a very fundamental change in working conditions and we hadn't been consulted about this at all". He went on to explain that this was no knee-jerk reaction against change, and that many members had nothing against video journalism in principle, but they were all concerned that it had to be introduced in the right way and with sufficient resources.

This attitude is evidenced in the results of our survey relating to the introduction of online video. When asked if they were interested in undertaking video-journalism training 25 (49%) said yes, and 26 (51%) said no.

Chart 7.1: Western Mail and Echo Staff Perceptions of the Advantages and Disadvantages of Video Journalism



NB: Surveys were sent to 130 members of the Western Mail and Echo NUJ Chapel. All percentages refer to proportions of the final sample of 51 survey respondents.

It is clear from these results that perceived disadvantages outweigh perceived advantages. **The most obvious fears amongst staff are that they are already too busy to assume further responsibilities (84%), and that they won't be paid for the additional work they take on (82%).** Secondary fears include the possibility that the production of video content will damage the company's core print products (57%) and that the training offered will be inadequately resourced (39%). 41% and 43% of respondents respectively thought that advantages in agreeing to do the training would include future chances of promotion and the prospect of more varied work. 55% thought that video skills would make them more employable, while 57% viewed the acquisition of new skills as an advantage.

Worried about issues such as overwork, pay, and damage to the printed newspapers, the union chapel placed a moratorium on co-operation with online until its concerns had been adequately addressed. After the union moratorium, managers considered their options and in November 2006 asked the union to co-operate with sending volunteers on training courses.

Meanwhile, photographers at the company had started to discuss amongst themselves the future of their positions in a digital environment where reporters would be sent out with video cameras. A local NUJ source continued:

The photographers on all the papers are very worried about the video journalism situation, because they feared that many of them might be put out of a job. They were saying look, if this is to go forward it makes sense for us to be very heavily involved as we've got visual

skills in a visual medium. They were very emphatic that if this was the way forward they wanted to be a part of it.

The chapel met and agreed with them, principally to avoid conflict between NUJ members. A pragmatic decision was taken to support the photographers when they volunteered to train as videographers on condition that the training would be tailor-made to suit their particular skill-sets, and that the photographers would not be asked to actually present any news packages. Our source told us that in late 2006:

we told the company that in these circumstances, and with the constraints that exist here, we certainly don't think we can have reporters doing this work because there just isn't the capacity to do it, and if you are going to train anybody then we think it's the photographers that should be trained to do it.

Since then there has been no further communication between the union and company managers on the future of video journalism. He continued:

My suspicion is that they haven't got the money to push this thing along. There hasn't been any further approach from the company about the logistics of how video journalism might operate, and in recent meetings the editors have been really playing it down.

At the time of writing it remains to be seen in what direction the negotiations will take next. Considering the enthusiasm of local and group senior managers for the idea of online video content, however, it is very unlikely that the issue has disappeared.

8 Case studies: Trinity Mirror Multimedia Pilot Projects

This chapter recounts the experiences of Trinity Mirror staff working in three different newsrooms in the North of England which have tested versions of the company's multimedia strategy. Data from these case studies were gathered from semi-structured interviews with reporters and video journalists who have been involved with multimedia pilot schemes in Newcastle, Middlesbrough, and Liverpool.

In order to measure the success of different aspects of Trinity Mirror's multimedia strategy, and to assess the reasonableness of Western Mail and Echo reporters' fears over the future of online, we interviewed workers at the three regional newsrooms across the North of England where the group has initially rolled out and tested its multimedia policy. The interviews sought information about respondents' views on general working conditions, as well as the introduction of multimedia. Findings signal that these workers are suffering from the same negative and disruptive working conditions identified in the Cardiff newsroom and discussed in Section 3. As well as complaining of a number of the digital journalism-related problems recounted below, they all also spoke of shrinking workforces (and chronic non- or delayed-replacement of staff); very low pay; long hours for no additional reward; over-use of PR and agency copy; an increasingly desk-bound working life; as well as pagination cuts and reductions in the number of print editions published.

The experiences of the journalists we interviewed confirmed that many of the concerns held by Western Mail and Echo employees were well founded. **In the workplaces where the multimedia policies have been tested: journalists are now even more stretched than they were before; very few resources have been invested by Trinity Mirror to pay for the move to digital; no extra pay has been offered to those who have taken on additional duties and learned new skills, and; many perceive the introduction of multimedia content to have adversely affected the quality of the news they are able to produce.**

8.1 Case Study One: The Newcastle newsroom

2000 online strategy at Newcastle:

As in other parts of the group, the year 2000 witnessed substantial sums invested in creating the regional news website *ICNewcastle*. A reporter from the region claimed that as well as transferring print copy to the website, the web team also had some responsibility for writing original editorial content:

Around that time they launched *IC* websites at all the regional centres, and they did put some staffing into that. A former colleague of mine moved across to do that from conventional newspapers, so they had a team that was putting newspaper stuff on the web but also creating some of their own stuff as well. The strategy was to create a

new platform called *IC Newcastle*, which strangely didn't use the names of the print brands that we already had – the *Journal*, the *Chronicle*, and the *Sunday Sun*.

But when the dot-com bubble burst, the Philip Graf online strategy burst with it and there were a number of redundancies. He went on, “There was no audience there at the time, and no way of making money from the web so it ended up with a lot of people losing their jobs. And then all the web team did was put the newspapers online, and there were obviously a lot fewer working on that than before”.

2006 multimedia strategy at Newcastle:

According to this source, the developments under the new multimedia policy are a step in the right direction, with the various elements in the plan being much better considered than the ill-fated Graf strategy. They are, however, being stifled by the company's seeming unwillingness to fund them adequately:

The frustrating thing is that this time they've got it right, but they haven't put any money into it. What they've done now is re-jig things to take advantage of the newspaper brand names, and they're looking to create real interactive and multimedia content online that we can't offer in the newspaper. For example if there's a league table story in the paper then they'll put the whole table online where we couldn't have printed it, or if there's a crime that police are looking for help with they'll put the CCTV footage on the web. So they're cross-referencing from one to the other, which should drive traffic. I just wish they'd give us more staff so we could do this properly.

Web-first editorial policy at Newcastle:

Unlike many of his colleagues across the group, he is also very positive about the introduction of the web-first policy in Newcastle, although he remains extremely frustrated about the pressure it places on staffing levels in the newsroom.

They're also looking to introduce a rolling news service. Rather than getting scooped by a BBC news bulletin because they come out every hour, and we only come out once a day, the idea is that as soon as we hear something and have the bare bones we'll put it on the website to give people a reason to go to it. This is quite a sensible idea, but we can only allocate one dedicated person on the *Journal* to do it, and only one dedicated reporter on the *Chronicle*. And even that puts pressure on the rest of us. The rest of the staff have to pick up the slack. **So while we're busy trying to write the newspaper, and a story breaks, one member of staff is taken out of the picture and works on getting it online. No-one's thought that this is gonna take extra time out of the day and that it's gonna detract from the main job of making a newspaper.**

Another reporter from this region is not quite as enthusiastic about online, and thinks that these concerns about pressure on resources and added workload are beginning to

be shared by regional managers who, consequently, are doing the absolute minimum necessary to advance the plans.

There's always a link at the bottom of the newspaper story, saying go to *ICNewcastle* for the video report or online story – but why would you bother? The strange thing is I think they might now be realising that the policy is flawed. **They saw the opposition spending on their websites and getting people trained as video journalists, and thought they didn't want to be left behind, but didn't actually think how they should be going about it, or whether this was the right idea. One of my colleagues got trained up and hasn't used the skills once since then – the strategy is non-existent.**

Video journalism at Newcastle:

There are currently three journalists with video training on the *Journal* and three on the *Chronicle*. Two of these were trained by the Press Association on three-week courses at Howden, and the rest attended shorter courses at a training centre in Middlesbrough. Only the Howden-trained reporters have so far been allowed to create any video content for the website. There has been no extra pay offered to those who have re-trained, and no extra resources have been provided to cover the print work normally completed by those who now produce video news.

The staff accepted the introduction of video content in early 2006. Many were enthusiastic about it, but much of this enthusiasm has subsequently ebbed away:

They were talking about it as an experiment, and maybe foolishly we thought well it's a pilot, lets see how it goes. And it's not a bad idea if it's done right. If it's paid for and if it's staffed. If we can provide a bit of content that's different to what regional telly does, and it feeds off and adds to what's in the paper I can see why that would be a good idea. But there isn't the extra resource.

Initially high hopes about the quality of the training on offer and the seriousness with which Trinity Mirror were treating the new plans, were dashed when trainees returned to work after their short courses and were expected to produce content for the web immediately:

It's quite bizarre. In December 2005 we had a cost reduction programme, so we lost a handful of staff then, and come the New Year they said they'd be training people in video journalism. **They trained three people from the *Journal* and around the same on the *Chronicle*, and they went on a short course to learn to do this, but what they produced wasn't really very good. They tried hard, of course, but they were one-man production units, and trying to produce something equal in quality to what the BBC does is just crazy.**

Extra work created by video news:

This source continued, “the original idea was that they’d fit this in with their normal work, so if there was a story that lent itself to video the same reporter would go out and take notes in the conventional way for a print story, but also film for a clip on the website”. In practice, the difficulties of producing news for two different media platforms soon showed this was impossible. He explained:

Nobody had put any thought into this, and it turned out you can’t do both at once. So they spent longer in the field, ‘cos you have to do the notes and then do the film because you can’t take shorthand notes while you’re filming. Then you might also have a photographer on the same story if you need still shots for the paper. And when they came back they had to write up that story, then spend pretty much half the day doing this five-minute film. It’s a complicated process to edit it and get the sound right. It just wasn’t thought out at all. They didn’t realise the consequences of taking some of our best people out of the newsroom for a day at a time to do a video.

This point of view was corroborated by a video-journalist from the region, who told us:

It’s absolutely created more work. Without a doubt. I have to do my own job writing stories, and do the video stuff as well so I’m stretched a bit. I don’t do as many print stories as I used to, even though I’m trying to, then my colleagues are a bit more stretched as well. We’re getting stretched and stretched. It’s just a case of get the job done, work overtime, and claim it back if you can.

The amount of work created by the resource-intensive practice of producing online video news clips is difficult to measure accurately, but one staff member with knowledge of the process told us, “generally speaking you’d expect a senior reporter to produce three page leads in a day plus plenty of other smaller bits, but with this, he could probably only do one story in a day. Because he’s got to go out and film this, and spend all this time editing it once he gets back you’re basically losing him for the day. As things stand with the core news team here that means we’re losing one fifth of our strength on any day you do a video. Whoever’s left behind has got to work that much harder to cover for that”.

Editors’ reluctance to fully implement online strategy:

A video journalist from the region told us that when he returned to work after the video training there was a “honeymoon period” during which he was asked to produce a considerable amount of video content, but that this did not last long. “It’s difficult to say what the ratio of work between video and print is for me. When I first got back to the office there was quite a lot of enthusiasm for me to go out and try as much stuff as I could. So I’d double up on jobs. If I was doing a print job that would make a good video I’d take my camera along, come back to the office, write up the story and make

a video of it as well”. He continued, “last August was when I finished the course, and I did six or seven videos initially, and then it sort of tailed off a bit”.

Managers in Trinity Mirror newsrooms are used to working with depleted workforces, but they are unwilling to devote time to video news when its production endangers their ability to produce their newspapers. The video journalist explained:

the volume tailed off partly because my editor is not so keen for me to spend time on the videos when I’ve got print stories to do. It does take a lot more time. It takes maybe an hour to film and then three or four hours to edit a piece if you want to do it properly. Like other papers we are quite pressed for staff, and my editor’s thinking is that we can’t really afford that much time to be spent on videos when we need to fill the paper. I’m only doing about one a fortnight at the moment.

This view is backed-up by another observer of the pilot at Newcastle:

To the editor’s credit, he’s not really for this, I don’t think. He can’t say that officially, but as I see it he’s done as little as possible and said to the news editor, look, only if you’ve got free staff and you can really afford it does anyone go out doing videos. He basically recognised that it wasn’t sustainable. No, we can’t do this because we’ve only got a handful of journalists as it is we can’t afford to lose more for half-days or days at a time.

Content of video news:

There is a wide range of content on the video section of *ICNewcastle*, but sport, celebrity news, crime, and human interest packages tend to dominate. As a video journalist from the region explained to us, “a dry political story that might make a front page lead in a paper wouldn’t necessarily make a very strong video. I guess people in videos make strong images”. Two pieces of video that stand out are CCTV footage of convicted murderer and Gulf War veteran David Bradley threatening a member of the public with a pump-action shotgun, and a grainy self-shot mobile-phone video clip of murderer Scott Nichols eerily admitting his guilt after stabbing someone to death. Whilst these pieces are undeniably macabre, there is an argument to be made that they are of interest to the public, and publishing them in this way is clearly an innovative use of the regional news website’s capabilities.

Local police are becoming much better at feeding CCTV and other video content to journalists, and the newspapers are more than happy to accept this cheap and convenient source of copy. Our video journalist told us, “the police are definitely getting more adept at giving us footage of things like car chases and fights and that sort of thing”.

More alarmingly, however, free pre-packaged clips from open-source video websites are also being used increasingly. He continued:

One thing that's becoming more popular on the website is using footage from websites like *You Tube* and things like that, which we can just take and use on the site for free without any copyright implications. For example if you go to *You Tube* and type in Newcastle and come up with a fight that happened last week, you can just stick it straight on the website for nothing. It's quick and it doesn't take any effort.

He concluded with a note of frustration that this cheap or free content often gets more of an audience than his painstakingly produced news packages, "The stuff that you spend a lot of time on that takes time to make will maybe only be watched by 2-300 people, but a two-minute talking head with one of the sports reporters or CCTV footage would be maybe watched by loads more than that".

Another journalist was similarly frustrated about this use of cheap, low-quality content from third parties:

We can't really afford to have people out in the field, so if we're going to have video content on the website it'll be CCTV, funny things off *You Tube*, third party stuff. **Clips from last night's *Big Brother* can't be far away.** This completely misses the point as to why people buy our newspaper. They buy it for the unique stuff that we can do and nobody else can. They buy it for local news and if we're not providing that why would they bother. Unfortunately Sly Bailey's eyes light up when she hears the words free content or cheap content.

Quality of video news:

The use of pre-packaged video clips online, just like increasing reliance on public relations and wire copy in print, is a real concern to those who believe in the production of quality local and regional news. Even those clips which contain original content and are shot and edited by journalists, however, are often of very poor quality. One reporter from the North East told us:

Essentially they've now recognised that what we can do isn't very good, and it isn't really being watched. We did a piece at a local air show – a few minutes and some background about an annual event with the red arrows and whatnot. The journalist did a smart enough job, but it wasn't as good as [regional television news programme] *Look North* could do, so if people wanted to see what the air show was like they'd watch *Look North*. Why would they go to our website for a second rate job?

Since editors have realised exactly how much work it takes to shoot, edit, and create video content, many of the original pieces that do get made tend to be shot in the newsroom, and involve nothing more than journalists speaking directly to camera:

One of the things they do now is talking heads – one of the sports writers talking about soccer to camera. That can be done cheaply and

easily in the newsroom at the end of the working day without too much editing needed. But it's amateurish stuff, and to be honest it's all a bit embarrassing.

Another gripe is that too often the online video content does not offer readers and viewers anything different to what they can read in the newspaper or on the website. It is alleged that no real thought has gone into exploiting the unique potential of the medium. The same source stated:

The video stories so far tend to be a video version of what's gone in the paper. Nothing new or different is really offered. Nobody's really thought about why people might want to go to a website and see this. If there's something different, new, or something they can't get elsewhere then they might. But if it's just a poor man's regional telly or a home-video version of the newspaper, they won't bother. Why would they?

Finally, journalists believe that continued emphasis on creating news for the internet, without the introduction of additional resources, will eventually damage the quality of the printed newspapers:

If we were asked to create more multimedia stuff with no extra resources, the quality would go down. By definition you haven't got as many people writing the newspaper, so they'd have to do what they did before quicker and to a worse standard, and they wouldn't be able to create as much local news anyway so they'd probably have to use more national copy from the PA wire. In terms of our strength – which is creating good local and regional news – it would suffer because it'd be diluted and there'd be less of it.

Future of multimedia at the Newcastle newsroom:

Reporters are despondent about what they judge to be the future of the multimedia policy in the Newcastle setting. After being initially open and receptive to the pilot project, staff have quickly become very jaded. When asked what the future held one employee told us:

We don't know if things are scheduled to increase on the multimedia side, but then again we wouldn't know. They wouldn't tell us because that's not the way they do things. They try to just land things on you with no warning so it's just a *fait accompli*. That's their style of management. There's no notion of consultation with staff and saying "we're looking at doing this, how do you think we should go about it... are there any concerns?"

If Trinity Mirror did initiate a conversation with their employees at this regional centre, they might not like what they heard. Our video journalist concluded:

To be honest, multimedia takes significant investment, and Trinity Mirror are playing at it at the moment... they're not really getting stuck into it. They realise that the internet is the future, and they have to be involved in that, but they don't know exactly what they want from it.

8.2 Case Study Two: The Middlesbrough newsroom

In October 2006 the Middlesbrough *Evening Gazette* NUJ chapel passed a motion expressing grave concerns that the multimedia strategy was going ahead without any extra resources being invested. One source close to the newsroom told us: “the concerns were over staff. Principally, that if reporters would be going off with cameras that would take them away more and more from the printed product and limited resources would be spread ever more thinly”.

The immediate cause of this motion was that, in the wake of reducing the local *Evening Gazette* to one edition, management had allocated a number of editorial staff to the online department and charged them with developing content on a series of experimental micro-local websites. Journalists feared that this would have a detrimental effect on the quality of the newspaper. The editor replied to these concerns by arguing that the newspaper's circulation was not decreasing at the same steep rate as some of its competitors, and that hit rates on the website were up.

As their colleagues in Newcastle have found, journalists on the *Gazette* have experienced an increase in workload because of the video-journalism side of the multimedia pilot. One journalist explained, “It is a lot more resource-intensive to make video stories, just because of the sheer amount of time you have to spend producing it. Someone going out with a video camera will simply not be able to produce the same amount of stories as someone going out with a notepad and pen”. He continued, “If they go on a job that a journalist goes on just to come back and do a story, an experienced journalist could probably knock it out in 10-15 minutes. But video takes them much longer to actually piece the whole thing together. It takes a lot, lot longer”. He also told us that his colleagues worry that diverting tight resources to produce content for the internet will inevitably have consequences for the quality of the newspaper. “The development of the website is seen as a major part of the company's future income”, he told us, “when we have more and more demands being put on us to produce stuff for the web, we fear for the effect it will have on the printed product”.

Micro local websites:

The unique feature of the Middlesbrough pilot project is the focus on channelling resources into the production of micro local websites. Centred on a single post-code area, they are extremely focused on the production of news (and the formation of an interactive discussion-space) for the residents of a very small area. These are clearly Trinity Mirror's experiment with a format that can compete with the BBC's planned and controversial micro local service.

There are currently five of these experiments in citizen journalism up and running covering the Acklam/Linthorpe, Redcar, Guisborough, Ingleby, Barwick/Thornaby, and Norton areas of Middlesbrough. Each site publishes a limited amount of news, listings of contact details for various businesses and public services, and notice boards for civil society and special interest group events. The majority of the content is user-generated, and there has been extensive advertising of the sites in the newspaper encouraging people to become bloggers, to post on bulletin boards, and publish photographs of their local area. The company has had limited success in encouraging readers and participants to the sites, but it is not yet known whether they will generate the kind of revenue needed to make them profitable. So far advertising revenue generated by the sites has not come from local advertisers, but has consisted of add-ons for those larger companies that buy space on the main website *Gazettelive*.

8.3 Case Study Three: The Liverpool newsroom

The multimedia pilot project has been underway at Liverpool since early 2006. In contrast to the plans at Cardiff the *ICLiverpool* website makes full use of the existing print newspaper brands. The names of Liverpool's two main daily newspapers, the *Daily Post* and the *Echo*, dominate the website, which has integrated a number of interactive features into its design including notice boards, bulletin boards, picture posts, and blogs. It also has a sizeable video and podcast archive. As has been the case elsewhere, however, the amount of additional work generated by the pilot has placed the workforce under considerable pressure. In late 2006 the local NUJ branch started a group grievance procedure in protest against the new working conditions, and in January 2007 Trinity's regional management submitted to a number of key demands.

Video journalism at Liverpool:

The *Post* has one trained video journalist and the *Echo* have two (including a dedicated multimedia editor whose job it is to provide regular video content and oversee digital news production). In addition to this there are a number of reporters who have been informally trained in the use of video cameras. One journalist in the region told us, "there are quite a few people who we've trained up since the video journalists came back who can now do the basics, and can take the camera out and press record. Only a few have had the training and can do packages, but there are people who are starting to informally pick skills up, although not on the editing side of things".

Extra work created by video news:

As in other company centres, the video journalists have found that it takes a good deal of time to produce video clips for the web. One reporter with knowledge of the process explained:

How long it takes really depends on the subject and the package, but it seems like you need at least an hour or two on the job to get some decent shots, and then you have to come back and capture it in real time, so if you've got half an hour or 40 minutes on the tape it takes that long to put it up on the system.

And then it takes another few hours to edit it. And after that if you've got to write the story for print or online as well that can take another hour. So it can take a full day to do it properly, video journalists don't often get that here, though.

He added, "When I do a video I just know I'm going to be here until all hours, and if you're one of the only people that knows how to use the editing programmes, which can be quite temperamental, if something goes wrong then it's down to you to fix it and that can just take hours". This work, however, can be a relatively thankless task given that editors who are unfamiliar with the editing process are often frustrated by the resource-intensive nature of the exercise, **"On my paper they don't understand how long it takes, so they tend to give you other work to do as well which often results in you staying late and stuff like that, just because they don't have a clue how long it takes"**.

Editors' reluctance to fully implement online strategy:

Another journalist from the region indicated that local managers had been forced to take a pragmatic view of developing video and online content because of the amount of resources available to them. He told us, "I think what we're doing is the minimum possible at the moment". Another went into more detail:

The *Post* is under real staffing pressure at the moment as they've had a few people leave, so because of that the video is always the first thing that falls by the wayside. They try and get one decent package a week, and then if anything else comes up they just hit record and try and get something up on the site. The *Echo* do a bit more because they've got a dedicated multimedia editor who's kind of on it full time who does something on video most days.

Extra pay for producing video news:

A Trinity Mirror employee familiar with the pilot claimed that, unlike at other Trinity Mirror regional centres, there had initially been an agreement in principle from managers that the new skills learned by videographers would be rewarded with higher pay:

Video journalists aren't getting paid any extra for it – and that's a big bugbear. They were supposed to be getting more money. Nearly a year ago now we were promised more pay, and the union tried to get us some more money, but management keep putting it off and saying that they're reviewing it centrally, and it's just fallen by the wayside. They were talking about putting them one step down from, or on the same level as, specialist reporters, which would have given them a few grand a year.

A representative of the NUJ in the region corroborated this story, stating:

We've got a few people who've been trained in using a video camera. In the first discussions I had with management about that, it

was agreed they'd get paid as specialist writers. That was acceptable to us, and they didn't have a problem being elevated like that because it would have meant significantly more money. Local management were quite happy with that, too. Then it went down to Trinity Mirror and it all got bogged down, and to date nobody's got paid anything extra for doing it. Local management were quite reasonable, but central managers in Canary Wharf weren't.

Industrial action over the multimedia pilot at the Liverpool newsroom:

The strain on journalists' workload created by video and other aspects of the digital pilot was so considerable, that they decided to take industrial action in December 2006. The amount of extra work reporters were being asked to complete had been increasing steadily over time. One example reported related to sports writers and football match reports. "The sports reporters will write a match report of around 2000 words, and they were asked initially to write a 300 word report in addition to that for the web, and they didn't really have too much of a problem with that. It was a bit of a pain, but it was manageable". Our source continued "then suddenly this demand for an extra 300 words went to almost 500 words to be done on a laptop while they were at the match, and it got to point where it was actually putting at risk the main match report because the reporter couldn't input his stuff on a laptop and watch the game". The pilot web-first editorial policy was becoming a strain to implement in practice. "The same thing was happening to reporters, say doing a page lead. They found themselves being asked for more and more web-copy in addition to the work they were doing for the paper".

Just before Christmas we took out a group grievance procedure on behalf of all the reporters and writers at the *Liverpool Daily Post* and *Echo*. It is over web technology and the work it's created, and the hours that reporters were working. All this was impacting in a big way on their working hours. So the union's approach was that fundamentally, people work a 7½ -hour day, whatever they do in that time whether it's for the web or the paper they should not work more than 7½ hours, and if they do they should get time in lieu or get paid for it.

In an environment where there is a tacit expectation that reporters should stay as long as it takes to get the job done, and often a tacit acceptance on the journalists' part that they won't be paid for this overtime, this approach is quite radical in its simplicity. One NUJ source from the region told us, "I talked to a female reporter who actually worked a 16 hour day for no extra time off or pay. We went to a meeting with management and told them it was unacceptable and probably illegal for anybody to be obliged for those sorts of hours and we simply weren't going to take it".

According to this source, senior managers at the company claimed to have been unaware of the extent of the extreme workload and conditions of service in their own newsroom. The management structures in place are far more subtle than the caricature of the "fat cat" managing director wringing every last atom of surplus value out of employees suggests. The union representative continued, "They were blissfully unaware of the situation. What was happening was that junior middle-managers like

news editors were under pressure from on high to get stuff for the web done as well as production deadlines for the newspaper as well, so they were passing the pressure on to reporters”. He summed up the union’s uncompromising approach to the workload problems:

It’s inevitable that the online strategy has created more work for existing staff, but we’ve got to keep tabs on working hours. It shouldn’t affect workloads, because if you work set hours it shouldn’t matter if you’re doing stuff for the web or for the newspaper. We’re dead keen to stop this unofficial pressure to get reporters to work ridiculous hours for no extra reward. It has got to stop and we hope it has stopped. If management want you spend the time you’re in the office writing a blog or writing an article that doesn’t matter, as long as those hours are stuck to.

Concessions gained by the NUJ at the Liverpool newsroom:

In January 2007 management and union representatives met and a number of concessions were made on demands relating to hours worked, workloads, unfilled vacancies and staffing levels. The grievance was suspended for two months as a measure of goodwill, and management set down in writing exactly what would be done to accommodate the workers’ demands. A local NUJ source told us:

We’ve suspended the grievance for two months, and I’ve got a letter from management saying what these new arrangements are. Basically what is happening is that all existing vacancies are to be filled immediately which has been a very significant achievement. Jobs were advertised almost immediately and people were being interviewed within days. The second advance I think we’ve won is that future editions will be linked to the amount of staff available to do the job in hand, so if there’s a flu epidemic or lots of staff are off sick, the remaining reporters will not be expected to do the extra work to fill the paper. They will either have to get copy from somewhere else or reduce pagination.

The company turned down the idea of a time-owing log, but they agreed that managers should now expected to “be proactive in giving staff time off in-lieu if staff have worked overtime”.

Significantly, another concession won is a complete revision of the inadequate pay-banding system “to take into account the extra work people are doing for the digital news, so that everybody will get pay increases once the process is complete in a couple of months”. Another digital-related point that the company has agreed to is that the web-first policy should not adversely affect existing shift patterns. Our source explained, “with print journalism there are fixed production schedules, and with the web there aren’t. Potentially it’s a 24/7 operation, and one thing I wanted to make members aware of, and it’s part of the agreement we’ve got, is that shift patterns must not change without further agreement. People can’t be starting work at midnight, for example, unless they’re paid significantly more”.

According to the union in Merseyside, the most important thing that they gained from the action is that “working time is now at the top of the agenda, which is where it should have been all along. This has been forgotten and slowly eroded over the years”. An NUJ organiser continued, “the action’s been suspended for two months to see if these new arrangements actually work out. We’ll recall chapel in two months time and if they are as good as their word then we’ll cancel the action, if they’re not it will be re-imposed”. The branch is now also involved in pay negotiations, and at the time of going to press had just rejected a 3% offer.

We are a strong chapel, we’ve got something like 93% membership, so we could if we felt like it completely paralyse the publication of both papers, and it may well come to that over pay if we don’t get a significant increase on the 3% offer, my next action will be to call for a ballot. I hope it won’t come to that though.

The NUJ in the region is under no illusions about the inevitable shift to multiplatform journalism in the company, they have, however taken strong action over the way that this transition will be managed and the effects it will have on the working lives of journalists. “I’m absolutely convinced that both Trinity Mirror and local management see the future in digital content”, said one source. He added, “I think the action we’ve taken hurt their digital operations – well it basically brought them to a standstill – and they were really very keen for us to lift it”. Another Liverpool journalist commented, “digital and video are definitely the future, but we’ll need loads more resources to do it right”.

9 The Move to Multiplatform Journalism Assessed

This chapter canvases the opinions of academics, professional associations, and media commentators concerning the move to journalism on multiple platforms: the first section articulates the NUJ position based on a detailed interview with a national representative with a specific responsibility for new media; in the second section, many of the arguments initially made by journalists are reiterated and forcefully endorsed by academic and other observers; the third section recounts a number of additional concerns raised by experts about the move towards multimedia journalism; while the final section outlines a possible alternative to the business plans and multimedia strategy adopted and implemented by media companies to date.

9.1 The NUJ Position On Multimedia

The NUJ, along with most of the journalists interviewed in this report, fully supports the move to online and multimedia news, as long as this transition is properly funded, staffed, and resourced. NUJ assistant organiser for new media Jenny Lennox told us:

We don't want to prevent the move to new media, I think it's something we should be supporting, but we want it to be properly funded and resourced. The companies are expecting existing staff to do more essentially, and what worries us is that people will just end up working longer to cover for it.

She argued that journalists who are already overworked need to protect their working conditions which might be affected adversely by the move online. “There is a really bad culture of taking advantage of staff and expecting them to work very long hours. There are newsrooms I deal with where people leave their coats on the back of their chairs so that managers don't think they've gone home, because you don't want to be seen to be the first person leaving the office”. She suggested that “if that culture exists already and you then bring in a 24-hour web-first news strategy the implications are terrifying”.

Lennox continued, “in theory, if you have a good web strategy, and if you resource it well, it could be a way of turning things around, but there's no evidence that this will be the case”. To re-enforce this opinion she points to the seemingly inconsistent manner in which the policy has been implemented to date:

The company is so inconsistent – they don't have a sustained strategy for anything other than making money. At Western Mail and Echo they've had a presentation about multimedia journalism, but I haven't heard of that being done at any other places. They're rolling it out piecemeal. In some places they're saying well this is the strategy and this is what we're going to do, and in others they don't seem to be saying that at all.

She also points to the less than fully committed way in which the company has embraced the internet so far, complaining that the strategy rarely constitutes much beyond publishing newspaper stories online. “But the thing is”, she argues:

doing it properly (with video, audio, blogging, interactivity, and discussion boards) requires resources. It takes an awful lot of time to do these things and keep them going, and time and resources have not been provided. This is something that people at the *Guardian* have taken very seriously, and have resourced properly. They understand that to do this properly you have to put the resources in and this is something that’s completely bypassed Trinity Mirror.

If the company can be criticised for the fragmentary and stunted implementation of its multimedia strategy, however, the NUJ must also realise that its resistance to the strategy’s implementation has also been too dispersed and partial. Lennox acknowledges this, stating:

I think because we negotiate on an individual basis with different workplaces, bad practices and poor ideas slip through. Quite often I see situations where individual chapels will say, well, you know, we’ll go along with this and see how it pans out. And then what happens is you get invited in six months later and they tell you it’s a complete disaster. I seriously hope that doesn’t happen with Trinity Mirror’s multimedia strategy.

The move to the production of digital news implies many fundamental changes to the way journalists work and the products they create. **If the union are to have an effective voice in negotiating the nature of these changes their organisation will have to be far more sustained and systematic**, and communication between the nodes of resistance will have to be much better than it is at present.

9.2 Expert Commentary: Core concerns over the move to multimedia news

Each of the main areas of concern raised by journalists in this report (i.e. anxieties about resources, workload, quality, and training) are shared by the academic specialists and expert commentators whose opinions were canvassed for this study. We have included a selection of their comments on these aspects of the shift to online news presentation to underscore their endorsement of journalists’ views.

Resourcing the move to digital:

Various sources have suggested that what is needed to implement the online policy successfully is more editorial staff in the newsrooms to cover the additional work created by the move to multiplatform journalism. After the expensive debacle of Philip Graf’s year-2000 digital strategy, however, it seems that the company is unwilling to commit fully to the internet for fear of incurring further losses. If this assumption is correct, the move online will be under-funded, and consequently journalists will be stretched ever more thinly. In turn, the quality of the news will

suffer even more than it already has, and substandard news products will proliferate. Jenny Lennox argued:

At the end of the day, putting on a video does not mean running a campaign, or any of the good things that local journalists should be doing, and you still have to have that. You have to invest in editorial content, and if you don't, and you expect the same staff to do more work it will damage the core publications even more, which is what they say they don't want to do.

The multimedia strategy and journalists' workload:

Closely related to the problem of resources is that of journalists' growing workloads. This report reveals that in many Trinity Mirror newsrooms a culture of working long hours (often for no additional pay or time off in lieu) already prevails. This study also illustrates that in those newsrooms where the multimedia strategy has been piloted, there has been a marked increase in the amount of work staff are expected to undertake. **It is reasonable to assume that without additional new editorial staff, there will be considerably more pressure on already overworked journalists when the strategy is unrolled nationwide.**

In the context of Trinity Mirror's history of cost cutting, redundancies, and non- and delayed-replacement of staff, there is little to suggest the company's remaining regional journalists would fare any better. On the contrary, evidence from the company's pilot digital newsrooms in the North of England, in tandem with the proclamations of senior managers, signal a bumpy road ahead.

In the short term, a significant obstacle which management will have to negotiate is the reluctance of their own editors to implement the multimedia policy fully. Editors in a number of Trinity newsrooms hold quiet reservations about the workload implications of the scheme and are reluctant to ask staff to take on the additional work necessary to produce materials for the website. The same is true elsewhere. One academic with in-depth knowledge of the local and regional news industry told us, **"I think most editors are looking at each other and saying, firstly, how can we ask our staff to do even more when we'll have less staff producing more pages, and secondly, thinking why would we want to do that anyway?"**

The quality of multimedia content:

This issue lies at the core of many informants' expressed concerns about the move towards multi-platform news. Critics are worried that online content will be substandard and may reflect badly on the print title's brand reputation, but they are also concerned that the diversion of human resources towards producing news for the web will adversely affect established print products. Trinity Mirror's regional head of multimedia provision Michael Hill is aware of the pressure on newspaper owners to provide video clips for their websites, and is equally aware that much of what is placed online is of inferior quality. He insists that Trinity Mirror will not be guilty of producing video for the sake of it, and that audio visual material is only a small part of the company's online portfolio:

In some quarters there's a rush to let's just put loads of video on the site without any real thought as to whether people would watch it or what it adds to a story, and it's there just because it's a video and hey, we can stick our hand up and say we've got three videos a day. But it might be that nobody downloads them, nobody watches them, and they may be of poor quality. I think that video has a part to play, but only in relevant areas.

The centrality of video news to future online plans at Cardiff and to the strategy in practice in the pilot newsrooms, suggests that this comment is somewhat disingenuous. It also betrays blindness to the poor quality of much of the video content already offered by Trinity Mirror newsrooms involved in the various pilot schemes.

The content of video news clips offered by the Trinity pilot schemes is varied, and includes packages similar in style and presentation to local regional news, short unedited rough cuts of footage obtained from the police or from open-source publishing sites like *You Tube*, slick short films produced by businesses to provide information about local regeneration projects, and cheap and easy "talking head" pieces in which a reporter talks straight to camera about a specific news item. A format that has not yet so far been tried by any Trinity Mirror video journalists is the regular news bulletin. This tactic has, however, been used by the *Hull Daily Mail*, the *Manchester Evening News* and the *Lancashire Evening Post*.

An already dominant trend in the production of video for Trinity's regional news websites seems to be a reliance on pre-packaged sources of material. The amount of original journalism that goes into internet news clips is minimal. Just as desk-bound print journalists are being forced to rely on wire and public relations copy, so the over-worked video journalist is looking more often to sources like the public services, the private sector, and internet clip-sites to provide moving images for the IC websites.

Trinity's Michael Hill told us that this pre-packaged material was very popular:

The sorts of videos that are getting most hits are crime videos where people record crimes in action. I think it's the moving picture version of the CCTV grabs that the police farm out to the newspapers at the moment. When and where it's available we're asking for relevant incident video or breaking news video because in the past we would get stills off that video anyway.

Sometimes this kind of news can make for compelling, entertaining, and informative viewing. Much of the time, though, police footage is grainy, unappealing, often published without added commentary from reporters, and amounts to little more than good public relations exercise after the police's latest dawn raid.

More worrying than the use of police footage and CCTV is the increasing willingness of Trinity Mirror titles to host user-generated video content provided by *You Tube* and similar web sites. One journalist at Johnston's *Lancashire Evening Post* told us:

Quite a bit of CCTV and police stuff goes up if it's relevant and local, and I can't see a problem there because you're not going to get that from anywhere else. You couldn't send out your photographer to get that. But we don't take anything from *You Tube*. I'd be surprised if anyone did, to be honest.

Despite many journalists' distaste for the idea, however, the practice is becoming widespread in many newsrooms. One academic source told us:

You Tube is also an obvious source of stories when things are tight. There was a film a while back from Sunderland of a couple of girls having a cat fight, and that was put up online, very quickly taken down, but then it was enough to provide a local story for the *Echo*. In fact that raises issues in itself – in putting this kind of thing on your own website are you not glorifying this yourself?

A number of sources also pointed out that the Press Association has begun to offer internet video content, and that in newsrooms run on a tight budget it is likely that when the prospects of creating original video content become too expensive, the wires will step in as steady content providers. One expert predicted, 'PA are going to be important in filling these video bulletins. They provide multimedia and video content for the web, and unless companies change the resourcing situation journalists are going to have to rely on outside sources for content. People just won't have time to make their own'.

Because online regional video news is still in its infancy evaluations of the products must be tempered by the fact that most practitioners are still learning their trade and experimenting with the medium. Even after taking this into account, though, **most observers comment on the very poor quality of many of the video news clips published online.** One academic expert told us:

I don't think there's a problem [with video journalism in the regional press] in principle, but what seems to be happening is that newspapers are seizing on this. **They've been told you've gotta get video clips on your website, you've gotta go multimedia, and they're doing it in the cheapest way they can and they're just throwing up [...] clips which are badly made, badly produced, and don't do anything to assist the story because they're not really aware of what makes good TV and what people are looking for.**

This commentator believes that the move to video journalism is a desperate attempt at enticing more readers to Trinity Mirror brands, "they don't believe that newspapers will be around in 5-10 years' time. They think that the internet will be the platform of choice and that they have to move over to the web if they're going to hold advertising, which as we know pays for newspapers at the end of the day, and therefore they have to build their web presence". However, he believes that "it's not very well thought through both in terms of the migration of newspapers to the web and in terms of the quality of what they're producing for the web". An academic expert in digital media

remarked, “they [...] look like student projects. They look as cheap as they are. It depends how important you feel production values and journalistic values are, and I suppose the key question always should be “is the story strong?” or is it just a correspondent sitting in front of a camera reading the day’s news out, which is what a lot of them are unfortunately”

Web-first editorial policies damaging print:

Most of the major players in regional and local news in the UK have already decided to embrace some version of the web-first editorial policy. There is no stable consensus that this is the right way to develop, nor any certainty about how much it will affect sales of existing newspaper products or overall advertising revenue. One senior academic explained the system:

News has now become a constant deadline-free stream, so you’re sitting there and you’re the first on a local story, and you know you can’t put it out until 11am or something like that. It’s a real dilemma as to whether you put it on the website or not. Now, pretty much all the nationals have decided to put it up on their websites first, presumably on the basis that when you want to go for in-depth coverage you’ll get the paper the following day.

But there is still a great deal of uncertainty about whether this strategy works, and most local and regional journalists have serious reservations about the policy. He went on to say, **“from the conversations I’ve had with senior journalists they feel intense pressure to put stories online, but they also feel that a) the story’s then up for the competition to take, b) that they’re almost scooping their own paper, and c) they haven’t got any hard evidence as to whether it will create any more sales”**. On the contrary, many believe that it will have a negative impact on print sales.

Supporters of multimedia journalism could claim that these opinions are anachronistic, an analogue view of journalism in a digital age. **It could be argued that privileging the printed page above all else is misguided, and that the news product, whether it is read from paper or a computer screen, or viewed and listened to in video or podcast format, should be at the core of the modern media business. To make this argument, however, means accepting an irrevocable change in the way the news is produced and consumed. It also suggests a willingness to gamble the future of printed newspapers on a new and largely unproven and unpredictable business model.**

Training

In the words of the NUJ’s assistant organiser for new media Jenny Lennox, **“they only get a few weeks’ training. What can you learn about video journalism and editing video in that time? The ramifications are a bit mad”**. It is clear from our practitioner interviews that this view is very common. Journalists believe that the move from one news medium to another is a very serious step, and while they are willing to embrace multiplatform news, they believe it is imperative that they are

adequately trained. If their progress on this issue so far is indicative of Trinity Mirror's future plans, then the future does not look bright.

Experts in the field consistently stress the importance of adequate training, not only so that journalists will be well equipped to carry out their new work, but also to provide them with the confidence they need to make the transition from only producing print copy to writing stories and producing audio-visual material. A well known specialist explained:

There has to be a commitment to training, and in the work I've done on convergence in the past, one of the main fears that comes out when talking to journalists is that they all thought they didn't have enough of it. So I think if a media company is going to start expecting video journalism they certainly need to build in plenty of time and money for good training.

It is clear that this has not happened in the case of Trinity Mirror. In fact, many experts are very dismissive of the level of training offered to video journalists. One told us, "some of the training is happening at Howden, the PA's nightmare factory. They now organise their own PA training there, and local papers can send their journalists down. It's very small-scale, very quick turnaround, very cheap indeed".

Another academic media scholar we interviewed commented on how she had been approached by a regional news company as a possible provider of training for their video journalists. She found that she was unable to offer an adequate package within the time frame they wanted and for the money that the company was offering. "We designed a course that we decided would work. It would take a week, it was a very intensive week, and therefore we had to charge quite a substantial fee". But this was unacceptable to the company. She continued, "we were then asked if we could trim that down, so I made it clear that the only way I thought we could do that was to provide a course that would not give them what they wanted. At the end of it we were providing a course that I'd told them I didn't think was quite good enough, and still we didn't get the contract". She concluded by evaluating the course that the company eventually settled on, "looking at the course they were providing, frankly, they were offering even less journalism than we were, and I'm not blaming them for this, but the course just doesn't provide what is needed".

9.3 Expert Commentary: Further concerns over the move to multimedia

In addition to echoing the concerns made by journalists, interviews with academic specialists also revealed a number of additional anxieties about the ways in which many regional news companies were executing the move to digital news. Principal among these were: the inability of video clips to exploit the internet's potential for interactivity; the view that the emphasis on online video news was misguided; and concerns over the commercial viability of the web.

Exploiting the potential of the internet:

The *Guardian*'s new media editor Emily Bell stated in 2005 that **“there is a lot more to successful web publishing than just replicating a newspaper online”** (Bell 2005). One specialist told us that, two years later, he wasn't sure that companies had yet got this message. He detected an air of desperation in the current move towards digital news provision, stating “there's a feeling that they've got to do something, and maybe, just maybe, this is the right thing. I don't think it is any better thought through than that. They feel they've got to get into the internet and that involves having video and involves other things like interactivity, so you'll see a poll tagged on almost every story”. Many experts believe that **if regional newspaper businesses are going to succeed online they will have to be a lot more experimental with the ways they convey the news than they have been so far.**

Another academic new media analyst agreed with the suggestion that much online newspaper journalism only pays lip service to the potential of the internet to tell stories and recount the news in different ways. **He believes that emphasising video journalism as the centrepiece of a multimedia strategy is unimaginative, and fails to exploit the formal differences between producing news for print and the internet:**

There's a paradigm issue here. Print journalists don't really need to rethink what they do too much to tell a story in sound or images, and they'll be familiar with those ways of telling stories, but to tell a story using interactivity does require more thought about how you approach it, how you treat the audience, and how you structure the story. You're not talking about an inverted pyramid any more, you're talking about arrows going in all sorts of directions. I think that's an issue.

The “inverted pyramid” is a metaphor used to teach young print journalists how best to write a newspaper article. The broad base of the triangle at the top of the diagram represents the most newsworthy information in the news story, and the narrow tip at the bottom represents the least interesting facts in the story. Simply put, when you write a story in inverted pyramid format, you put the most newsworthy information at the beginning of the story and the least newsworthy information at the end. The internet “hypertext” on the other hand allows readers and writers to move away from the linear way of reading and writing the news that print necessitates. Anyone who has ever clicked on a link halfway through reading an internet text or e-mail message can begin to understand the very different ways in which the web allows us to present and process information.

Is video journalism appealing to the web 2.0 generation?

It has become commonplace in the newspaper world to say that readers of the news now expect information to come to them when they want it and in different forms. It is not so commonplace to hear regional newspaper companies devising convincing strategies for fulfilling this reader expectation. There are even those who believe that **putting too much emphasis on the provision of online video content is misguided.** One multimedia news expert told us:

I think they're going in the wrong direction. First of all, if you're going to go online video isn't the best medium to do that. It's just not interactive, and it's not making the most of the possibilities of the web. It's not searchable. Users will have to watch a whole five-minute clip, for example, even if what they want to see is four minutes into that clip. They've no way of knowing where that content is. I don't think it's the right medium.

The logic of this argument is convincing, especially when one considers the declining popularity of the two media the newspaper companies are trying to meld here: print and television news.

I think this is misguided. Audiences of print journalism are declining, but so are audiences of television. Young people don't watch TV as much any more, and if you're going to tackle this problem the last thing you want to do is imitate the medium that your audience are also turning away from. What they're moving towards are games, mobile phones, the web, chat, social networking and things like that. And if that's where they're going I think that's also where the newspapers should be going.

US media commentator Vin Crosbie has made a similar point. **“converging two declining generic media does not an ascending generic medium make. Just adding multimedia capabilities overlooks the core reason why those generic media are declining”** (Crosbie 2004).

Generating sustainable profits from regional news on the internet:

High and growing levels of internet use bode well for local and regional news companies looking to entice more online readers. The availability of broadband internet in the UK is very high, with 99% of people able to access ADSL high speed internet, and 45% able to access cable net (Likewise, internet usage is increasing at impressive rates, with 61% of British adults accessing the internet in 2006 compared with only 30% in the year 2000). 73% of the total number of adult internet users in 2006 use broadband, and this number is growing daily (this is highly significant given the high bandwidth required to download or view streaming video news online) (Ofcom 16th November 2006).

The challenge for regional and local news companies is to convince internet users that they actually have something new to offer. So far they have struggled to do this. One academic expert told us that even though it is very difficult to get an accurate picture of hit rates on regional news websites in the UK because the companies refuse to publish accurate audited readership figures, he believes that the market is very small. “For regional newspapers all I've got is second-hand ‘somebody told me this’ accounts. But the feeling is that hit rates are very low. We're talking hundreds or low thousands, very small, different to the well thought-through websites of papers like the *Guardian* or the *Sun* which are getting substantial numbers of hits”. He added:

Traffic figures for private use on websites, however, I haven't got. Nobody has, as they're extremely confidential. In terms of the actual

reportage, in terms of specific reports, the mini-news bulletins that some regional news providers have gone in for, they're actually very small. The *Hull Daily Mail* is meant to be leading the way but I think the most they ever claimed is 1000 hits on a news bulletin. The editor at Hull is very bullish in public, but privately he's saying, well, it's not there yet, and we're not sure how it's going to get there either, but we've got to give it a try.

Another commentator told us, "I think the main editor's reaction is: we've got to try something. When a new editorial director comes into a group and says, we've done this research, people want things in different colours, and they say OK we'll try that, it might just work".

The profitability of online video:

A recent ICM poll for the BBC found that only 9% of the population said that they watched online or mobile video regularly (types of video watched included *You Tube*-type clips, news and sport, and online television shows). 13% said they viewed occasionally, and 10% said they expected to start watching in the next 12 months. **But two-thirds of the population said they did not watch video online and could not envisage starting in the next 12 months** (ICM November 2006).

Unsurprisingly, the survey found that online and mobile-phone video is far more popular among the young, with 28% of those aged 16-24 saying they watched more than once each week. An average of only 10% aged 25-44 were regular online and mobile video viewers, with that figure falling further to just 4% of over-45s. (ICM November 2006).

The big question for regional news companies is can they carve a niche in this emerging market and provide content that enough people want to see for it to drive traffic and advertising revenue on their websites? **A more specific question the industry must answer is how to turn internet video into a reliable stream of revenue.** At the recent New York City Media Summit online video was a major topic of discussion, but "everyone – whether in TV, print or telephony – was struggling with the same issues", and "the underlying question seemed to be 'where's the revenue?'" (Gibson February 12th 2007).

A source close to the *Lancashire Evening Post* pilot digital project at Johnston Press told us **he saw online video as "an untapped source for revenue", although he admitted the company was not quite sure how that potential revenue could be tapped. "In a way" he said, "that revenue's not been realised yet, but I think media organisations are prepared and willing to give it a try at least"**. Most companies so far seem to be applying a print-journalism advertising model to their websites' multimedia content, using banner ads at the margins of pages or pop-up windows alongside links to the company's own classified advertising sites.

This source went on to outline a new video advertising scheme being trialled at Preston:

In terms of advertising a good example of something we're about to launch is a talking ad – a video advertisement a bit like a television commercial. So instead of a static text-based ad, or even just an image, now when you click on the ad graphic you can get actual video where someone will be talking and maybe giving a virtual tour of a commercial premises or shop, so it's more engaging for the reader, and therefore more attractive to the advertiser. We're in the process of selling these ads at the moment and have already produced a few of them.

Another attempt at advertising innovation has been made by Northcliffe's *This is Hull and East Riding/Hull Daily Mail* website, where the daily video news bulletins are interrupted by brief ads for local businesses.

Online advertising:

In 2005, the online advertising market was worth £1,366,400, up 65.6% on the previous year. The internet Advertising Bureau, the trade association of UK internet marketing firms is upbeat about the figures, "taking a 7.8% share of all UK adspend, online advertising continues to be the fastest growing advertising medium in history" (Internet Advertising Bureau, 2006). They say that spending on internet advertising grew by 65.6% year on year, and that online advertising's market share has grown to 7.8% for the full year.

Regional news companies are all very enthusiastic about the growth rates of their online advertising revenues. It should be noted, however, that as a percentage of overall turnover these figures remain very small, and their impressive growth rates are striking at least in part because they are increasing from a very low base. Maintaining this kind of expansion will be very difficult, and will be dependent on companies producing content that people actually want to read/view/listen to, as well as coming up with ways of turning this content into reliable streams of revenue and convincing vehicles for advertising. In the words of one expert source:

I can't see a market for the kind of multimedia stuff they want to produce. Let's be honest about it. If you want cutesy little stories on video, then you'll go to local television stations, not a newspaper website where the videos are made by non-broadcast journalists. I've been hearing complaints from regional *television* journalists that now they're being sent out with a camera on their own, and then asked to edit their own pieces together, and they find that terribly difficult even though it's an environment that they've worked in for a long time. So if you give a camera to a person who's essentially a writer, how can you expect them to fare better?

Many commentators are similarly unsure whether local and regional newspaper companies are up to the job, and do not believe that the migration of readers from print to online will guarantee the levels of revenue and profit that they have become used to. Firstly, because the product is often of dubious quality, and secondly, because online readers are simply not as attractive to advertisers as print readers. "Currently, the loss of print profits by having a user switch to the online product isn't

compensated by an equivalent gain in digital profits” write Herbert and Thurman, continuing:

This is because: (i) the company no longer receives revenue directly from the user; and (ii) **the value of that user in terms of advertising is still considerably lower online**. Crosbie estimated that “**newspapers need between 20–100 readers online to make up for losing just one print reader**”. Although most newspaper managers would consider this figure overly pessimistic, they might concede that a print user is still worth significantly more than a web user. (Herbert and Thurman 2007)

This is an even bigger problem given that most regional newspapers sell to an ageing demographic, and consequently many newspaper advertisers aim to address older readers. If these newspapers are to succeed on the internet they will not be able to export their already existing advertiser-base across platforms.

E-editions and paid content as a source of revenue:

One strategy which companies see as allowing them to avoid some of the risks associated with going online is to charge readers for some or all of the online content, or to sell e-editions of their newspapers. The most high-profile national newspaper to make extensive use of this tactic in the UK is the *Independent*, which allows readers to subscribe to its premium content (including pieces by the respected Middle East correspondent Robert Fisk) or to buy individual articles. Most UK national dailies offer discrete downloadable e-editions that offer readers electronic replicas of the day’s newspaper including magazines and supplements, but these are not thought to be very profitable. Some, such as the *Guardian*, also charge users to view advertising-free versions of their websites.

Many Trinity Mirror regional titles (including those at Western Mail and Echo) are now available in the subscription e-edition format, but the company first piloted the strategy in Newcastle with their regional daily the *Journal*. One former employee from the region explained:

Lots of us saw the policy of putting all the newspaper’s stories on the internet for free as slightly crazy. I think that reality was reflected when they created an online e-edition version of the journal. You could turn the pages and even hear the sound of the page turning, and you had to subscribe to that and pay. What they did then was put tasters on the front of the old website, and a message saying something like, “to read more subscribe to journal online”.

Despite the popularity of this move among some reporters it has been a resounding failure. A senior academic with knowledge of the scheme went into more detail:

They’ve said that to get the *Journal* online in the same layout as the real newspaper you pay £9 per month, and there was real surprise that hardly anyone took it up. The editor’s confessed that less than 500 have taken this up, and I imagine that many of these will be

advertising and PR agencies who need the cuttings from time to time. In real terms I think circulation's probably more like a couple of hundred. Massive investment's gone into that, and they're still putting whole or half-page colour adverts every day saying you must take this up. But why would people want to? It may sell to a few expats, of course, and a few to agencies, but that's it.

Perhaps because of the low levels of customer interest in e-editions, senior managers such as Western Mail and Echo's Keith Dye play down their importance as part of the overall multimedia strategy.

9.8 The Future of British Regional and Local Journalism: Invest or decline

The evidence gathered in this report points to a stark choice facing newspaper companies planning to diversify into digital markets. They can continue to make cuts with an eye on maintaining short-term profit margins and watch the quality of their news decline over time, or they can invest in their businesses with the aim of producing quality print and digital news products with a view to creating sustainable long-term profits.

According to NUJ's new media spokesperson Jenny Lennox there is much disappointment amongst new media workers in the local and regional newspaper industry about the way their companies are squandering a real chance to get their internet presence right, and to exploit the full potential of the medium. "I spend a lot of my time working with new media people and there's a general level of frustration – they don't understand at all the way newspapers are going about this," she claimed. "The businesses only see it as an opportunity to make more money, they see that web advertising is probably going to be the way of the future, but then they cannot see that you have to pay for something properly for it to work, for it to have any quality or gravitas, so that you actually have something to sell advertisers".

Equally, many newspaper workers feel that the most likely outcome of current managerial strategy will be the slow decline of print products. One Trinity Mirror journalist prophesied, "I dread to think where we'll be in 20 years' time if we carry on like this. Sales will go down, and people won't stick with the web unless they see something new in it and unless the quality is good. It's gotta have the investment or you're wasting your time". He continued, **"they're managing long-term decline for short-term profits at the moment. Unless someone is radical enough to invest, then I dread to think about it. If you get your web presence right, you can sell adverts, but you've got to get it right"**. It is clear from this and other interview material presented in this report how journalists feel, but one senior academic with close ties to the industry told us that editors are similarly despondent:

The view about the future of newspapers on the board of the Society of Editors is relatively relaxed because they think they'll go on for at least another ten years by which time they'll be gone. Of course the managing directors' views are even more short term. They're looking at the next two to three years, which just means they've got to get the profits up.

There is, however, an alternative business plan to the destructive slash and burn strategies of many newspaper companies. This back to basics policy is often referred to as the “investing in journalism model”. One academic explained it to us:

I’ve tried to think this through as a business model, and it seems to me pretty straightforward that any business that’s putting out a product of reasonable quality can attract a reasonably good quality price.[...] What seems to be happening in newspapers now is that the product itself is very poor, journalists are badly paid, there aren’t enough of them to do the job, they spend their time in the office just re-writing press releases, not getting stories that actually interest people. And then newspapers are surprised that circulation is falling.

He continued, “we can look at newspapers that say 20-30 years ago had a staff of say 15-20 people covering a wide range of material, and now they have a staff of four to five many of them barely trained, and the quality of the product they put out is quite low”. He added:

Management continue to cut staff in order to raise profits (and profit levels are very high in newspapers already) but if we actually look at the businesses they have very few assets now. Very few of them are in the right buildings, very few have equipment or any other real assets, the turnover is reducing all the time, so although the profit percentages are high the total amounts will drop. When that profit level drops there isn’t anywhere else to go.

The implication is that newspapers can only cut so much before there is nothing left to cut or save money on except the newspaper’s reputation, or brand identity. Our source concluded:

The newspaper brand is going to become very important. It’s *that* they need to keep and retain to go onto the website. If you look at something like the *Guardian*, one of the leading news websites, why isn’t that happening on a local basis? To do that you need journalists going out, finding stories, covering them well, and putting them out at a high standard. I think people are less concerned about whether the stories on the website are in audio, video, or text, provided there are good stories there. If you keep cutting, you get profits, but after a while you’ll pay for it.

Support for the investing in journalism model is high among Trinity Mirror regional reporters. One told us, “It’s not like putting money into a newspaper and paying for quality is some big new radical idea. The profit margins might not be quite as big, but they would be sustainable, and the newspaper would be there in 20 years’ time”. He went on to say, “as it is they’re just flogging it for all it’s worth before it dies”.

That we have reached the stage where the idea of investing in news content seems extreme or outlandish is a sad reflection on the state of media ownership in the UK. Looking around the country it is increasingly difficult to point to models of good

behaviour where owners have consistently championed and paid for good editorial, but there are still a few outstanding examples from which the large Plc.'s could learn a lot. One senior academic pointed to one:

If you look at somewhere where they never moved away from the back to basics model, somewhere like the *Wolverhampton Express and Star*, where they continue to feed an appetite for local news by employing lots of local journalists, by having high story counts, lots of little stories, often looking very traditional. They seem to have escaped the worst ravages of the decline of daily papers. It's almost like having a weekly every day, but it seems to have worked, and of course weeklies aren't doing too badly either.

A reporter familiar with the region also cited this family owned local newspaper's products as an example of best practice in the newspaper industry, "they've invested a bit of money – that's all it takes, and they're the biggest selling evening paper in Britain. They still run the newsroom like a slave ship, but they have the resource to put out a good paper". They have also managed the shift to online very well, consistently publishing video news clips, and producing the usual interactive features such as blogs and user-generated picture posts.

Another impressive model is the family-run *Newbury Weekly News*. A local weekly with an excellent website, this company has bucked the trend and invested heavily in its online multimedia content, and was last year named the Newspaper Society's Best Weekly Newspaper Internet Site. One academic source explained more about their strategy:

A small private family-run company, they found that community groups were setting up micro-news websites that were driving serious traffic, and saw that if people can get that information from there, why would they bother to read the newspaper, so they developed the model themselves. They made a presentation at the Society of editors, and when they explained that they'd taken on extra staff for all this there were gasps around the room. Three or four were taken on in a newsroom of about 15, which percentage-wise is quite impressive.

Common to both of these small success stories is one factor: the willingness of the owners to invest in their product. A prominent academic expert on new media "convergence" told us:

There's not a contradiction between investing in journalism and investing in the web. I think they should put money into journalism but that journalists should not be platform-specific. I think there should be better journalism, and you *do* need to pay journalists more, but that doesn't mean that all they do is put out a newspaper. I think companies should pay journalists more money *and* pay for them to learn to tell stories in a way that's going to reach more people.

Strictly speaking the “investing in journalism model” we propose here is not an alternative business plan at all. It is an essential element of any successful move towards multimedia news provision. In the words of one journalist from Western Mail and Echo: **“There will always be a market for excellence, and that applies as much in the newspaper industry as anywhere else. But excellence doesn’t come cheap”**

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Appendix A: Note on Methodology

The research reported here includes data gathered from:

- An extensive review of appropriate industry, professional and scholarly literatures to provide a background and context for the specific study of the strategy at Trinity Mirror. See the references
- An archival search examining company records to establish changes in levels of staffing, profitability, revenues, costs and other variables across two decades, and internal company documents.
- Responses to a questionnaire distributed by e-mail to 130 NUJ members holding key editorial positions in Trinity Mirror Wales to collect and present the judgements of journalists, editors, managers and other production workers within the Group towards the proposed strategy (see copy below). A week after the initial distribution a reminder e-mail was posted to the same group, and at the end of a two-week period 51 responses representing 40% of the total research constituency.
- A series of semi-structured interviews conducted with relevant newspaper staffs, in Trinity Mirror Wales and beyond. Informants were asked about a number of key areas including: Working conditions, salary and staffing levels, and attitudes towards multimedia policy, and expectations concerning company implementation of the policy.
- A second round of semi-structured interviews was conducted with NUJ officials, academics, and senior journalists at Trinity Mirror and beyond designed to canvass and report assessments of an alternative strategy stressing a greater investment in journalistic staffs and resources to buttress editorial content in newspapers. A total of 21 informants were interviewed by telephone and face to face. All interviews were recorded and transcribed. Interviews typically lasted 30 minutes, and when it was requested, interviewees were guaranteed absolute confidentiality and anonymity. Many Trinity Mirror workers expressed fears of company displeasure and recriminations if they were identified.

<p>E-mail survey sent to 130 NUJ members holding key editorial positions in Trinity Mirror Wales:</p> <p>1. Since you started work as a journalist is your workload: (a) considerably higher (b) a little higher (c) the same (d) lower</p> <p>2. In recent years has the number of journalists in your newsroom? (a) increased (b) remained the same (c) decreased</p> <p>3. When colleagues retire/change jobs are they replaced? (a) always (b) sometimes (c) never</p>

4. In recent years in your newsroom, have salaries generally:
 (a) increased (b) remained the same (c) decreased
5. Across the last decade do you think the typical journalist uses wire copy:
 (a) more frequently (b) about as often (c) less often
6. Across the last decade do you think the typical journalist uses PR materials:
 (a) more frequently (b) about as often (c) less often
7. Do you think the future for the local/regional press involves online editions and multiplatform journalism?
 (a) yes (b) no
8. The new multimedia strategy involves training staff in video journalism, and the production of news for the web and mobile phones – are you interested in such training?
 (a) yes (go to question 9) (b) no (go to question 10)
9. What advantages do you see in doing this training?
 (a) enhanced employability (b) chances of promotion
 (c) gaining new skills (d) more varied work
 (e) all of the above (f) other (please specify)
10. What disadvantages do you see in doing this training?
 (a) multimedia damages the quality of print journalism (b) already too busy
 (c) the training is insufficiently resourced (d) there is no financial reward
 (e) all of the above (f) other (please specify)
11. Do you think that extra staff should be employed to cover the work previously done by those assigned to do the new multimedia work (given that the amount of this work to be done is scheduled to increase over time)?
 (a) yes (b) no
12. Do you think that the multimedia strategy will create more work for existing journalists at the Western Mail & Echo?
 (a) yes (b) no
13. Do you think that the multimedia strategy will create more jobs for journalists at the Trinity Mirror group in the medium term?
14. Please add any extra comments of your own relating to your working conditions and the new multimedia strategy

Appendix B: Consolidation in the Regional Press Industry Since 1968

Major Regional Press Acquisitions Since January 1968						
Date	Company/Newspaper	Bought By	Sold By	Reported Price	Estimated Circ	
Nov-06	Wellington Weekly News	Tindle Newspapers	Northcliffe Newspapers		4,120	
Jun-06	Heartland Evening News	Iliffe News & Media Ltd	Heartland Eve News		6,321	
Mar-06	Aberdeen Press & Journals	DC Thomson	DMGT	£132m	218,071	
Jan-06	Scottsman Publications Ltd	Johnston Press Pic	Scottsman Publications Ltd	£160m	465,172	
Nov-05	Local Press Ltd	Johnston Press Pic	Local Press Ltd	£65m	166,390	
Aug-05	LSN Media Ltd	Iliffe News & Media Ltd	LSN Media Ltd		350,000	
	Score Press	Johnston Press	EMAP Newspapers Ltd	£156m	215,557	
Oct-04	East Lothian Courier	) Dunfermline Press	) D & J Croal		24,070	
	Border Telegraph))			
	Perthshire News))			
May-04	Y Cymro	Tindle Newspapers	North Wales Newspapers			
Feb-04	Sunday Independent Plymouth	Tindle Newspapers	Newsquest Media Group		28,434	
Jan-04	Century Newspapers Ltd	) 3i	) Trinity Mirror	£46.3m		
	Derry Journal Ltd))			
Jan-04	15 titles in North West London & Kent	Archant	Independent News & Media	£10m	304,000	
Dec-03	12 titles in North London, East London & Essex	Archant	Independent News & Media	£52m	316,000	
Oct-03	Gulion Group	Claverley Company	Gulion Group			
Aug-03	Aran Banner	Oban Times Group	Aran Banner			
Mar-03	Northam Newspaper Group	Alpha Newspaper Group			51,890	
	Glasgow Herald	) Newsquest Media Group	) SMG	£216m	250,745	
Dec-02	Glasgow Evening Times))			
	Sunday Herald))			
	Galloway Gazette & Strarrear News	) Scottish Radio Holdings	) Johnston Press		27,781	
Oct-02	Carrick Gazette & Girvan News))			
	Stornaway Gazette & West Coast Advertiser))			
	Aloa & Hillisfoot Wee County News	)	) Johnston Press		6,406	
	Hill Brycs (Leak) Ltd	Northcliffe Newspaper Group Ltd			17,645	
Jul-02	RIM	Johnston Press	) The Galloway Gazette LH	£500m	1,602,524	
Mar-02	Galloway Gazette & Strarrear News	) RIM	)		15,400	
May-01	Carrick Gazette & Girvan News))			
	Stornaway Gazette & West Coast Advertiser	RIM	Stornaway Gazette Ltd		12,403	
	Dimbleby Newspaper Group	Newsquest Media Group	Dimbleby & Sons Ltd	£12m	30,996	
Apr-01	Horley & Gatwick Life	Newsquest Media Group	Horley Publishing Ltd			
Jan-01	Morning News	Trinity Mirror pic	Modern Times Group		70,890	
	Horncastle News Series	) Johnston Press	Morton Media Group	£1.8m	24,276	
	Louth News Series))			
	Skelligs News))			
	Market Rasen Mail))			
	South Manchester Reporter	) Guardian Media Group	Morton Media Group		155,000	
Nov-00	Reddish Reporter))			
	Glasgow East News	Johnston Press				



The Newspaper Society

Oct-00	Southnews Plc	Trinity Mirror plc		Forest of Dean Newspapers Ltd	£285m	3,276,454
	The Forester	Northcliffe Newspaper Group Ltd				
	Mill House Media	10 Group			£0.9m	
Jul-00	Four Counties Newspapers	) Johnston Press		Southnews Plc	£16.9m	232,374
May-00	Lincoln Standard Group)				
	Newscom	Newsquest Media Group			£444m	499,550
	Alloa & Hillfoot Wee County News	RIM				
	Eskdale & Liddesdale Advertiser	CN Group				2,000
Apr-00	Swindon Messenger	) Bristol United Press		Newscom	£1.8m	90,757
	West Wiltshire Advertiser Series)				
	Fleetwood Weekly News Series	Regional Independent Media		Tindle Newspapers Ltd	£52m	9,000
	Adscene Group	Southnews Plc		Dentit Investments	£904m	891,837
Mar-00	Belfast Telegraph	Independent Newspapers		Trinity plc	£300m	360,039
	Cleveland Clarion	Newsquest Media Group		SR & VI Crane		35,000
Feb-00	Bristol United Press Plc	Daily Mail & General Trust				1,480,366
Jan-00	Scottish County Press	Regional Independent Media				53,166
	Hampshire Chronicle Group	Newscom Plc			£16m	98,336
Dec-99	Tweeddale Press Group	Johnston Press				30,699
Nov-99	Mirror Group Newspapers	Trinity plc (merged with)			£1.3b	9,756,697
Sep-99	Newsquest Media Group	Gannett			£904m	5,441,695
	Central Independent Newspapers	) Northcliffe Newspaper Group Ltd		Adscene Group Plc	£40m	432,000
	Admag Newspapers)				
	Portsmouth & Sunderland Newspapers	Johnston Press Plc			£266m	1,770,922
Jun-99	Chester Standard Group	North Wales Newspapers Ltd		Chester Standard Group		100,367
Apr-99	Millford & West Wales Mercury	Newscom Plc		Dewbrook Ltd		8,200
	York Advertiser	) Newsquest Media Group		Adscene Group Plc		59,135
Mar-99	Wetherby Advertiser)				
	The Outlook - County Down	Alpha Newspaper Group		The Outlook Press	£1m	5,200
	Atrouth Herald	) Johnston Press		Atrouth Herald Ltd		11,000
Dec-98	Cannusie Guide & Gazette)				
	Guernsey Evening Press	Jersey Evening Post		Guernsey Press	£27m	53,102
	Camrnan News	Tindle Newspapers				23,377
Oct-98	Powys Newspapers	Tindle Newspapers				11,769
	Recorder (Wales) Ltd	Tindle Newspapers				40,000
	Sheffield Journal	Regional Independent Media		Hurst Publishing		85,834 *
	Herald Newspapers (Beds & Bucks)	) Johnston Press Plc		Eastern Counties Newspapers Group	£8m	190,835
Sep-98	Home Counties (Leighton Buzzard & Luton))				
	Derry Journal Ltd	Mirror Regional Newspapers			£18.25m	84,039
Jul-98	Ross Gazette	Tindle Newspapers				5,736
Jun-98	Review Free Newspapers	Newsquest Media Group			£6.07m	136,043
May-98	Bath Advertiser Series	) Southern Newspapers Plc		Eastern Counties Newspapers Group	£2m	84,509
Apr-98	West Wiltshire Advertiser Series)				
	Hawick News	Portsmouth & Sunderland Newspapers Plc				
	Warrington Mercury	Newsquest Media Group		Kirman Reedts Ltd	£400,000	65,250
	Home Counties Newspapers	Eastern Counties Newspapers Group			£58.3m	675,348
	United Provincial Newspapers	Regional Independent Media		United News & Media	£390m	1,453,178
Mar-98	East End Independent	Trinity International Holdings Plc			£113,704	26,345
Feb-98	United Southern Publications	Southnews Plc		United News & Media	£47.5	1,387,893

	Bailey Newspaper Group	Southern Newspapers PLC			£35m	425,574
Dec-97	Heart of Wales Chronicle	North Wales Newspapers Ltd				
	North Derbyshire Newspapers	Johnston Press				
Oct-97	Wessex Newspapers	Bristol United Press			£35m	74,219
Sep-97	Ashdon Weekly Newspapers Ltd	Reporter & Chronicle Newspapers				62,559
Aug-97	Midland Independent Newspapers	Mirror Group Newspapers Ltd			£297m	22,803
Jul-97	Kenilth Times Newspapers	Independent Newspapers UK Ltd				1,692,894
	Echo Press (1983) Ltd	Midland Independent Newspapers plc			£3.7m	366,827
May-97	Frank Lawrence (Slough Observer) Ltd	Clyde & Forth Press Ltd			£4.5m	96,980
Mar-97	Hinckley Times Ltd	Midland Independent Newspapers plc				88,189
Feb-97	Cambridge Town Chief	Yatton Investment Trust				16,451
Jan-97	South Manchester Reporter	Merchants of Horncastle				132,452
Dec-96	UPN Wales	Southern Newspapers PLC			£31.5m	44,231
Nov-96	Barbury Cake	Bailey Newspaper Group			Quasforce	483,103
Oct-96	Oxford Journal	Counter Newspaper Group			Quasforce	35,438
	Sheffield Journal	Hurst Publishing			Goodead	83,320
Sep-96	Barbury Cake	Quasforce			Goodead	£200,000
	Oxford Journal	Quasforce			Goodead	86,194*
	Westminster Press	Newquest Media Group			Pearson Publishing	£5.5m
Aug-96	Caledonian Publishing Ltd	Scottish TV				83,320
	SE London & Kentish Mercury	Trinity International Holdings PLC			Westminster Press	£305m
Jul-96	Ormskirk Advertiser Series	Trinity International Holdings PLC			United Provincial Newspapers Ltd	4,069,425*
	Newquest (Midland North) Ltd	Midland Independent Newspapers plc			Newquest Media Group	1,497,648*
	Nottingham Herald & Post	Topper Newspapers Ltd			Midland Independent Newspapers plc	152,723
	Ulster Newsletter	Johnston Press			Mirror Group plc	60,213
	EMAP Newspapers Ltd	Mirror Group Newspapers Ltd			EMAP Newspapers Ltd	£211m
Jun-96	Century Newspapers Ltd	Bailey Newspaper Group			Tindle Newspapers Ltd	2,387,236
	Bristol Journal	Johnston Press			Eastern Counties Newspapers Group	£15m
Apr-96	Domcaster Newspapers	Newquest Media Group			Johnston Press plc	616,666*
	Bury Times Ltd	Adscene Group Plc			Tamworth Herald & Co	171,342
	Tamworth Herald & Co	Adscene Group Plc			SC Publishing	131,093
Dec-95	SC Publishing	Associated Kent Newspapers			Lichtfield Mercury	124,715
	Lichtfield Mercury	Johnston Press			W & J Linney Ltd	£19,54m
	W&J Linney Ltd	Scottish Radio Holdings			Morton Newspaper Group Ltd	74,352
	Morbens Newspaper Group (NI)	Northcliffe Newspaper Group Ltd			Reed Regional Newspapers Ltd	£9.85m
Nov-95	Reed Regional Newspapers Ltd	Newquest Media Group			Reed Regional Newspapers Ltd	118,381
	Belfast Telegraph	Trinity International Holdings Plc			Thomson Regional Newspapers Ltd	£20m
	Chester Chronicle & Assoc Nspres	Trinity International Holdings Plc			Thomson Regional Newspapers Ltd	£11.2m
	Newcastle Chronicle & Journal	Thomson Regional Newspapers Ltd			Thomson Regional Newspapers Ltd	275,724
	North Eastern Evening Gazette Ltd	Thomson Regional Newspapers Ltd			Thomson Regional Newspapers Ltd	£112.2m
	Western Mail & Echo	Thomson Regional Newspapers Ltd			Thomson Regional Newspapers Ltd	£82m
	The Scotsman Publications	Barclay Bros/Ellerman Inv Ltd			Thomson Regional Newspapers Ltd	£205m
	Croydon Advertiser Ltd	Southnews Plc			Thomson Regional Newspapers Ltd	4,945,126*
	Herald Newspaper Group Ltd	Home Counties Newspapers (Holdings) Plc			Thomson Regional Newspapers Ltd	1,077,426*
Oct-95	** subject to approval				Portsmouth & Sunderland Newspapers Plc	281,376
					Herald Newspaper Group Ltd	£327.5m
						1,302,278
						685,651
						685,651
						1,183,387
						1,389,603
						195,193
						£7m
						429,199

* = estimated circulation at time of purchase

Over (Bat)	Company/Newspaper	Bought By	Sold By				
	London Recorder Newspapers	Independent Newspapers plc					
Oct-95	Luton & Dunstable Herald & Post	EMAP Plc					
Jul-95	T Bailey Forman Ltd	Northcliffe Newspaper Group Ltd					
Oct-94	Halifax Courier Holdings Ltd	Johnston Press Plc					
Jun-94	Scarborough & District Trader	EMAP Plc					
Mar-94	West Wales Guardian	United Provincial Newspapers Ltd					
	Southport Globe	Trinity International Holdings plc					
Feb-94	Llanello News	United Provincial Newspapers Ltd					
Dec-83	Milton Keynes Gazette	EMAP Plc					
	Thames Valley Newspapers	Guardian & Manchester Eve News Plc					
	Argus Press Ltd	Trinity Intl Holdings Ltd					
Oct-93	Joseph Woodhead & Sons Ltd	Trinity Intl Holdings Ltd					
	Scottish & Universal Newspapers Ltd	Trinity Intl Holdings Ltd					
Jul-92	Surrey Mail	Surrey Advertiser Newspaper Hldgs					
Jun-92	Blackmore Vale Magazine	Trinity International Holdings plc					
Mar-92	Capital Newspapers	EMAP Plc					
	Ashborne Herald	Hull & Grimsby Newspapers Ltd					
Sep-91	Cardiff Independent	United Provincial Newspapers Ltd					
May-91	Strathearn Herald	Scottish & Universal Newspapers Ltd					
Mar-91	South Lancashire Newspapers	United Provincial Newspapers Ltd					
Feb-91	Wharfedale & Airedale Observer	Westminster Press Ltd					
Aug-90	Southern & Western Press Ltd	Westminster Press Ltd					
Jun-90	Edinburgh & Lothians Post	Glaswegian Publications					
Apr-90	Camrathen Citizen	Northcliffe Newspaper Group Ltd					
Jan-90	2 papers	Thomson Regional Newspapers Ltd	Century Newspapers Ltd				
Apr-89	T R Beckett Ltd	EMAP Plc					
Feb-89	9 papers	EMAP Plc	Parrett & Neves Ltd				
Aug-88	Courier Press (Holdings) Ltd	EMAP Plc					
Apr-87	Yattondon Investment Trust Ltd	Birmingham Post & Mail Holdings Plc					
May-85	8 papers	Read International Ltd	Benham Newspapers Ltd				
Jun-82	11 papers	Read International Ltd	St Regis International Ltd				
	3 papers	Express Newspapers Ltd	South Wales Argus (Holdings) Ltd				
Oct-81	45 papers	Read International Ltd	The Barrows Org Ltd				
Jun-81	14 papers	United Newspapers Ltd	J Andrew & Co Ltd				
Jul-80	West Somerset Free Press	Bristol United Press Ltd	Farnham Castle Newspapers Ltd				
Apr-80	29 papers	Guardian & Manchester Eve News Ltd	Surrey Advertiser Newspaper Holdings Ltd				
May-79	5 papers	Northcliffe Newspaper Group Ltd	Courier Printing & Publishing Ltd				
May-74	4 papers	Guardian & Manchester Eve News Ltd	G & AN Scott Ltd				
Apr-74	18 papers	Westminster Press Ltd	Kentish Times Ltd, Gravesend & Dartford Reporter Ltd				
Oct-73			and F J Parsons Ltd				
	4 papers	The Barrows Org Ltd	County Express Group				
Apr-72	6 weekly papers	George Outram & Co Ltd	Hamilton Advertiser and Baird & Hamilton Ltd				
Jan-70	3 weekly papers	Thomson Newspapers Ltd	Cusha & Son Ltd				
Jan-68							
	by NS Intelligence Uni						

Appendix C: The 20 Largest Publishers in the Regional Press

Top 20 Regional Press Publishers

01 January 2007

Based on total weekly circulation of regional and local newspapers published at least weekly and listed on the Newspaper Society database; audited circulations only

Rank	Group Name	Total		Dailies Paid & Free	Sundays Paid & Free	Weekly paid		Weekly free	
		Titles	Wkly circ						
1	Trinity Mirror plc	232	13,522,900	14	6,363,276	72	847,380	142	5,601,069
2	Newsquest Media Group*	215	9,432,283	18	3,742,619	71	939,118	125	4,692,329
3	Johnston Press plc	281	8,883,162	18	3,701,346	145	1,588,513	115	3,427,504
4	Northcliffe Newspapers Group Ltd	109	7,394,284	18	4,576,098	27	440,888	63	2,367,047
5	Associated Newspapers Ltd	11	6,726,185	11	6,726,185				
6	ARCHANT*	75	2,828,782	4	918,294	28	465,757	43	1,444,731
7	Guardian Media Group plc	43	2,659,496	2	1,162,497	15	207,352	26	1,289,647
8	The Midland News Association Ltd*	19	2,039,013	2	1,355,910	4	44,871	13	638,232
9	D.C. Thomson & Co Ltd	6	1,959,415	4	1,431,322	1	451,530	1	76,563
10	Wiffa News & Media*	33	1,221,176	3	310,164	5	226,488	18	605,141
11	Kent Messenger Ltd	21	808,759			9	150,272	12	658,487
12	Independent News & Media	6	739,781	1	528,750	1	77,817	4	133,214
13	Tindle Newspapers Ltd*	43	558,279	2	263,862	24	187,934	17	344,082
14	CN Group Ltd	10	475,189	2	263,862	5	90,999	3	120,328
15	Observer Standard Newspapers Ltd	14	439,039					14	439,039
16	North Wales Newspapers Ltd	12	438,262	1	119,515	3	37,001	8	281,746
17	Clyde & Forth Press Ltd	14	306,298	1	111,528	10	88,468	3	106,302
18	Irish News Ltd	1	294,276	1	294,276				
19	Guiton Group	5	223,752	2	223,752	2		1	
20	Topper Newspapers Ltd	1	212,750					1	212,750
	Total Top 20 publishers	1,151	61,163,081	102	31,829,394	422	5,167,936	609	22,438,211
	Total other publishers	152	2,244,653	4	283,543	106	720,244	41	1,123,671
	Total all publishers (87)	1,303	63,407,734	106	32,112,937	528	5,888,180	650	23,561,882

Source: Newspaper Society Intelligence unit 1 Jan 2007, ABC/NFD/Independently audited figures

Includes London Evening Standard, Daily Record, Sunday Post, Sunday Mail and the six regional morning free titles

Notes: Based on newspaper titles with their own circulation/distribution figures, as listed on the NS database

This does not necessarily show all titles published by each group (see online Sections & Supplements database)

* Includes titles with independently audited circulation figures

Appendix D: Front Page Leads in the *Western Mail* and *South Wales Echo* January 2007

Date	<i>South Wales Echo</i>	<i>Western Mail</i>
2 January 2007	MISING WOMAN FOUND; Police find girl in house	
3 January 2007	HELD AT KNIFEPOINT ON THE NIGHT SH	FINALLY THE REAL FACTS ABOUT THE VA YOUR HOUSE
4 January 2007	CARTOON LEGEND (GREN) DIES	JEALOUS LORRY DRIVER MURDERED LOV AND RUN JURY TOLD and ONE IN TWO WELSH BABIES BORN OUT OF
5 January 2007	PENSIONER TRAPPED UNDER BREAD VA cut free from beneath Brace's lorry	DAD DIES AS COUNCIL APOLOGISES
6 January 2007	SUSPECT PACKAGE BLOWN UP AT DELI; road blocks as army experts called in	WELSH AND SSCOTS RISK KILLING UK
8 January 2007	TRAGIC MUM'S BABY JOY; Man whose son gassed is expecting baby (Murder case)	WELSH WOMEN 'FATTTEST' IN UK
9 January 2007	OUR TINY MIRACLE; Baby Karen makes hist being born 4 months early	
10 January 2007	DEAD; Four days after being told she had flu	ALERT AS DEADLY NEW SUPERBUG HITS W
11 January 2007	FA CUP FINAL COPTER JUNKET SLAMME freebie day out for business big wigs	THE QUESTION THAT COULD HAVE SAVED GIRL; If only she'd been asked about travel says n
12 January 2007	SO CLOSE; Amazing pictures reveal how nurse were inches from disaster as roof crashes into pl	THOUSANDS WITHOUT POWER; And more ga on the way
13 January 2007	THE GREAT M&S RIP OFF; High street giant £1 on food prices for commuters	WHY I THREW AWAY £5000
15 January 2007	"WE'LL SHUT SCHOOLS ONE BY ONE"; Co reveals new tactic for controversial shake up	WALES MUST STAY IN THE UK SAYS HAIN
16 January 2007	WE'VE WON 5000 JOBS; South Wales set to jobs boost	POLICE OFFICIAL RAPED ME THREE TIMES NIGHT
17 January 2007	JOBS; IT GETS EVEN BETTER – Now St Ath for a second massive jobs boost	WALES POISED FOR 5000 JOBS
18 January 2007	IT'S THE BEST THING EVER; And our 5000 academy victory is partly thanks to ECHO reade	A BONANZA FOR WALES
19 January 2007	SCHOOL SHUT IN HEALTH SCARE; Pupils s after sewage floods car park	SAVAGE STORM BATTERS BRITAIN
20 January 2007	SHOPPERS Vs CYCLISTS; It's the battle of Q bikes set for a comeback on pedestrian shopping	
22 January 2007	POLICE GUNMEN SHOOT AT KIDNAP CAR open fire after city centre abduction drama	HOW MANY MORE CARS CAN MANIC M4 T
23 January 2007	GRANDAD DIES S HE SWIMS TO KEEP FIT	'INSULT TO WALES' STORM OVER LABOUR DONOR
24 January 2007	PENSIONER'S 44 DAYS WITHOUT HEATIN shiver in icy weather spare a thought for Myrtle	ALL PRESCRIPTIONS FREE IN WALES FROM
25 January 2007	82% SAY NO; Parking zone poll sensation.. but Council listen	BURBERRY BOSSES HIT BACK
26 January 2007	HOW DID THIS WANTED MAN SLIP THE N might look respectable but every police officer i hunting him	NO JAIL FOR SEX OFFENDER AFTER JOHN F ORDER
27 January 2007	PARKING SHAKE UP; We say NO	NO THANKS BURBERRY
29 January 2007	COUNCIL TAX BILLS SHOCK: And there's £ the way too	SHOCK COST OF TODAY'S RAFFIC JAMS
30 January 2007	VICTORY; Rodney backs down after parking v	POLICE BOSS WALKS FREE AS RAPE JURY C HIM
31 January 2007	PATIENT IN 'BOTCHED' OPS SCANDAL; 70 hospital after Assembly's waiting list clear-up ge wrong.	SHOCK NEW LEVY ARREST IN HONOURS 'C
1 February 2007	TOTS LEFT IN TEARS; Nursery trashed by va	ABERFAN'S 40 YEARINJUSTICE 'PUT RIGHT

	in two days	£2mn
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The editorial emphasis on crime and human interest stories in a modest one month sample of the Western mail and the South Wales Echo during January 2007, is striking.

Appendix E: ABC Circulation at Western Mail and Echo Titles 1993-2006

Title	<i>Western Mail</i>	<i>South Wales Echo</i>	<i>Wales on Sunday</i>	<i>Cynon Valley Leader</i>	<i>Glamorgan Gazette</i>	<i>Gwent Gazette</i>	<i>Merthyr Express</i>	<i>Pontypridd & Llantrisant Observer</i>	<i>Neath & Port Talbot Guardian</i>	<i>Rhondda Leader</i>
July-Dec 1993	68,456	76,452	61,675	8,956	16,954	10,003	12,732	7,574		8,663
Jan-June 1994	68,590	82,117	65,567	9,334	17,054	10,410	13,548	8,772		9,860
July-Dec 1994	64,570	79,844	60,923	9,650	17,921	10,570	13,577	8,660		9,940
Jan-June 1995	64,602	79,189	63,341	9,820	17,475	11,373	13,377	9,047		10,491
July-Dec 1995	64,172	77,618	59,311	10,195	17,059	11,211	13,432	9,183		10,727
Jan-June 1996	60,641	80,326	61,642	10,129	17,739	11,819	13,885	9,494		11,388
July-Dec 1996	60,251	76,340	57,379	10,225	18,109	11,578	13,901	9,522		11,344
Jan-June 1997	60,308	78,434	59,649	10,599	17,510	12,191	17,696	9,762		11,570
July-Dec 1997	60,150	74,246	61,541	10,262	17,930	11,852	18,427	9,537		11,356
Jan-June 1998	58,709	75,959	61,384	10,530	18,913	12,775	19,595	9,927		11,649
July-Dec 1998	57,637	74,630	62,286	10,546	20,048	12,321	19,218	9,826		11,497
Jan-June 1999	57,035	73,129	64,575	10,585	20,503	12,761	19,285	10,312	9,550	11,770
July-Dec 1999	57,131	70,973	66,239	10,732	20,590	12,833	19,050	10,169	10,165	11,889
Jan-June 2000	55,273	70,573	63,847	10,829	21,302	13,329	19,498	10,663	10,072	12,321
July-Dec 2000	53,474	71,066	60,564	10,761	21,351	12,857	19,236	10,502	10,607	11,869
Jan-June 2001	52,760	69,799	60,402	10,815	22,358	13,114	19,053	11,022	10,232	12,270
July-Dec 2001	50,306	67,504	58,198	10,666	22,316	12,860	18,544	10,865	10,099	11,989
Jan-June 2002	49,904	64,185	55,869	10,845	22,549	13,249	18,987	11,531	6,481	12,490
July-Dec 2002	46,732	61,757	54,799	10,630	22,633	12,999	18,024	11,635	6,803	12,507
Jan-June 2003	47,138	61,693	54,424	10,872	23,013	12,939	18,564	12,010	7,303	13,131
July-Dec 2003	44,559	59,590	50,166	10,938	22,931	13,148	18,198	12,277	7,013	12,959
Jan-June 2004	44,470	59,200	49,700	11,151	23,228	13,325	18,305	12,852	7,060	13,487
July-Dec 2004	43,247	57,852	48,060	11,002	22,819	13,008	18,725	12,868	7,003	13,339
Jan-June 2005	45,857	57,465	53,374	10,901	22,965	13,025	19,653	13,002	6,783	13,811
Jul-Dec 2005	42,956	54,635	47,724	10,831	22,594	12,820	18,945	12,630	6,157	13,435
Jan-June 2006	42,578	53,780	44,591	10,768	22,879	12,725	18,966	12,916	5,465	13,909