

# Unlocking Journalism Resilience:

Adapting a Digital Business Model To Promote Press Freedom



JULY 2019

## PREFACE

WAN-IFRA has reported extensively about the challenges of the digital media landscape, particularly related to business models. These touch every aspect of a news organisation: leadership and business management, technological expertise, organisational adaptations, news-gathering methods, and more. And these challenges are not unique to traditional media companies, but pure players as well. This ongoing journey is fraught with risk and can frustrate the ability of these media to reach their audiences and to establish financial sustainability – particularly those operating in politically and financially challenging environments.

In most cases, a move away from direct donor funding would mean immediate economic demise for independent new media players operating in such challenging climates. In the case of traditional media, an inability to develop and monetise their digital operations places strain on other operations, with pressure being applied to the newsroom. These deficiencies mean economic ruin in the worst case, and at best, make the media vulnerable to external influence, impeding their ability to contribute to the best of their ability within their communities.

In response, the WAN-IFRA Strengthening Media and Society programme looked to develop the ability of media to move away from donor dependency, improving their prospects of enduring economic and editorial independence via their digital operations. Within this, participants had the opportunity to develop projects to advance their media company's understanding of the innovation process, focusing on how to better prepare for and embrace future advancements in media. The aim was to build solidarity between participating media, via collaborations with start-up communities, academic institutions and technology partners. This report draws on the experiences of 54 media in the programme to maximise learnings from business development.

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# Executive Summary

This report responds to the challenges faced by media in politically and financially pressured environments as they seek to be more resilient. It delves deeper into the digital shift to explore business issues. In fact, little is known about economic experiences of media in repressed or flawed markets, and research evidence on how revenue models adapt remains nascent. Yet business issues are a major factor in the ability of media to contribute and impact their communities and is therefore the main thematic.

In light of constant changes in digital environments, changing media consumption habits and downward pressures on online advertising revenues, news media feel under increasing pressure to experiment with their revenues. This is not easy. Donor dependency is prevalent. News media need to innovate not only what and how they produce content but how they monetise. Many struggle to find a reliable digital roadmap. Despite best efforts, digital revenues remain small.

This report addresses this challenge by offering a toolkit approach to the business challenges being faced by media in eleven regions: South Africa, East Africa, Palestine, Philippines, Malaysia, Jordan, Egypt, Ecuador, Mexico, Colombia and Indonesia. All regions were eligible for official development assistance from the Development Assistance Committee of the Organisation for Economic Cooperation and Development, being identified as lower middle or middle income countries. With the exception of South Africa, all media organisations were operating in areas considered to be politically pressured according to 2018 World Press Freedom Index, positioned in the lowest half of all countries globally as ranked on press freedom.

The report explores the forces and factors - both external and internal - affecting digital business models against this backdrop.

We draw out lived experiences around business considerations in four main areas:

- What networks or partnerships are forming and how they may assist business resilience
- How media are responding as firms organisationally to respond to business challenges
- What digital content strategies and production techniques are being developed
- The role of audience engagement in the digital model

We then focus on the revenue model, drawing out workable options or successes in five main areas:

- Classified advertising
- Advertising networks
- Display advertising
- Sponsored content
- Membership and subscription models

The findings are based on longitudinal empirical data gathered from 2016-2018. Qualitative data was gathered in three stages to draw the lens on the lived experiences of media in varying systems across multiple operations. The sample offers a range of media in terms of market environment, structures, maturity, outputs and digital media. Successful strategies have been drawn out. The hope is that scrutiny of practice may tell us more about resilient business models in a precarious and rapidly changing environment.

## Key findings

- Overall editors were developing more strategic thinking about business and revenues.
- Steps were being taken to restructure teams for converged news business.
- Publishers were drawing on formal and informal networks to strengthen their resilience in terms of knowledge sharing.
- New revenue models were emerging through an incremental process of experimentation and adaptation.
- Revenue models involved close adaptation to opportunities in the contextual economic environment.
- Advertising pricing structures were adapted by fitting with the close economic context.
- Four publishers had explored membership or subscription models.
- Scalable opportunities exist around consortium-driven advertising networks.
- Audience insights and analytics played an increasing part in deciding what stories to select and their editorial treatment.
- Content decisions were made to reflect a positive impact in the community as well as a unique niche compared to other media operating in the same environment.
- Several publishers had specified new projects that extended the user experience, for example by including either an event calendar with accompanying adverts or sponsored content.
- Increase in engagement in social media platforms was in some cases organic, in others due to dedicated teams specifically recruited. Offline engagement strategies included meet and greets, exhibitions and events.
- Audiences were notably passionate about social justice issues, matters of privacy, corruption and big crime and expressed themselves across platforms when such issues were covered.





# The challenge of digital journalism business models

**Publishers globally are adapting to the digital present. Yet even the most experienced practitioners are hard-pressed to define what constitutes sustainable and resilient business models.**

A cross-cutting theme in the journalism business literature is that the transition to digital - first or converged models, necessitated by audiences who are increasingly online and on mobile, is a challenge. The erosion of traditional advertising-led journalism business models has been well chronicled in the US (Downie & Schudson 2009; McChesney & Nichols 2010), the UK (Fenton 2011; Nel 2010) and Europe where there has been a recognised shift away from profit and growth to survival (Levy & Nielsen 2010; Bruno & Nielsen 2012). The traditional revenue model which was based on generating income from advertising is in serious decline (Nelson & Susman-Pena, 2012). The lowered price of algorithm-based advertising does not offset the losses of print revenue (Chyi & Tenenboim 2016) yet non-profit sites do not perform better because of revenue diversification (Massey 2018). Nascent development of alternative revenues keeps earnings of many niche media small (Cook & Sirkkunen 2013) and competition from

macro forces work against profit in the news industry (Krumsvik 2012). Studying media professionals across five continents, Hollifield and Schneider (2017) found stable and reliable revenues to be the most critical resource challenge. The viability of the neoliberal commercial media model is in question, leading some to argue that media is a public good which should be funded by the government, possibly through taxes levied on electronic devices or grants (Peters, 2010; Živković, 2016) or by recognising media with charitable status (Picard et al 2016).

For independent media organisations operating in financially and politically pressured environments, it is even more difficult to survive using the commercial model because of hostile economic and political conditions (Cook, 2016; Deane, 2016). The market for advertising is small, and businesses do not want to be associated with media which are critical of the government (IREX, 2018). Macro-economic, technological and social factors limit the potential for monetisation through ad-based strategies in emerging markets (Pon et al 2017). Economic sustainability is largely dominated by exogenous factors such as weak national economy and technical barriers such as weak and slow internet connections or access challenges from missing infrastructure or affordability (Schmidt 2015). Jiménez Cárdenas et al (2017) find legal frameworks, stark urban-rural and economic divides, lack of infrastructure and funding, the economic elite restrict freedom of the press. Overall, market distortions materialise for many reasons: a weak economy means that local businesses have no incentive, or ability, to advertise; literacy and the purchasing power of citizens are low; oppressive regimes distort advertising by controlling who works with whom; business



development is thwarted due to legal and political constraints while cultural barriers create audience apathy (CIMA 2007; Nelson 2011; FOJO Media Institute 2013).

Focus has turned to the approaches or interventions that have been proposed or utilised to strengthen the financial independence or viability of independent media organisations, especially in developing countries (Ismail 2018). The overall finding is that independent media in developing countries are primarily reliant on grant funding (Schiffrin 2017, 2019). Some independent media organisations in Asia, Latin America and the Middle East are generating revenue from advertising, sponsorship, training workshops or complementary activities such as consulting services, public relations and book sales (Ladeas 2015). There are a few case studies of independent media start-ups in India which are sustained by a combination of grant funding and advertising revenue as well as use of native advertising and affiliate marketing (Sen & Nielsen, 2016). Likewise, some independent media outlets in Latin America are utilising new business models such as memberships or subscriptions (Breiner, 2014). Mixed revenue models or cross-subsidising of media businesses with

complementary for-profit business activities is growing in developing countries (Breiner, 2014; Ladeas, 2015; Cook 2016; Cook 2018). A study of 100 digital native start-ups in Argentina, Brazil, Colombia and Mexico found that revenue diversity is critical, identifying 15 different revenue types (Warner & Iastrebner 2017). In sub-Saharan Africa, newspapers are struggling to capture Internet revenues with digital revenues being less than 10 per cent of total revenue (Gicheru 2014). The biggest sites rely on advertising while mid-range sites struggle to define a dominant business model. In the Global South financial survival is the biggest worry for media outlets over political risk and physical safety (Schiffer 2019). Donor dependency is prevalent and advertising hard to come by. While some have experimented with membership models they do not deliver scalable revenues. However, these fledgling steps make it difficult to determine if these revenue models are viable or sustainable and there is little known at a firm level of how operations carry out their day-to-day business operations (Schmidt 2015).

There is much confusion around the terminology of economic and business viability and sustainability of the media. A lack of common understanding, as a way business situates and other monetary aspects underpin the production of high-quality journalism that benefits society. One of the key indicators for media viability lies within the Media Viability Indicators where “there are stable and diversified revenue sources that allow managers to plan for the future” (UNESCO 2015: 8).

However these stop short of explaining why or how different indicators affect economic practice. Deutsche Welle Akademie bases its model of media viability on five factors, which allows for a comprehensive analysis of the fuller media environment. A stable balance is required between: economic and funding-related aspects; political dimensions including internal dynamics and decision-making processes; the content and journalism practices; the technology of digital delivery systems, from the production workflows that cut costs to users' access to the internet; the community and relationship with audiences (Deselaers 2019). They define media viability holistically as the “ability of media outlets and media landscapes to produce high-quality journalism in a sustainable way”.

Where media viability is generally understood as a concept to mean basic survival, sustainable models in economic and business terms add the dimension of “the ability of firms to continue their activities and endure over time” (Picard 2017:244). Business and revenue performance is increasingly seen as central to sustainability because it is associated with independent self-generating operations, effective media management and professionalism. The Media Sustainability Index from IREX (International Research and Exchange Board) measures performance on five categories including a limited assessment of business management including diversity of funding, use of metrics and audience research and operational efficiency. For example for Egyptian start-ups sustainability is more on durable relations with stronger foundations among media teams, reader engagement and advertisers in the long run rather than narrow economic measures of media profitability (Sakr 2017).

Resilience goes further and refers to the ability of the media to sustain a flow of content or service, and make a profit, develop or grow (Cook et al 2016). It leans on the concept of

adaptive advantage: that media firms manage their business and strategies through a process of adaptation (Oliver 2016) developing responses to change and uncertainty. This includes adapting the financial health and capacity of the organisation to develop new revenues, networks and operations. According to the European Journalism Centre's Accelerator: “By resilience we mean an organisation is not only able to sustain its current structure, workflow and content production, but it is able to make profit and/or grow and scale over time, as well as adapt quickly to changes.” Viable, sustainable and resilient models are thus conceptualised as a transition process, much like stage gates. Adapting the digital business model includes a move through viable, sustainable and resilient models. This can be for products and services as much as firms as a whole. Resilience is presented here as a more robust media business offering that is able to adapt in the longer term, grow or scale, particularly adept at dealing with the reality that there is no universally applicable solution.

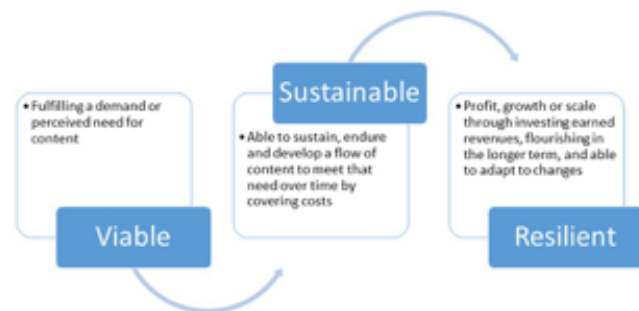


Figure 1: Viable, sustainable and resilient models as stage gates

Our starting point is to emphasize the importance of adapting revenues to achieve resilience. In this report, the business model is taken “in the sense of being self-sustainable on the basis of the income it generates” (Brousseau & Penard, 2007:82). We deem business models needing to allow for elements of change (Linder & Cantrell 2000) and in “how the firm receives and provides value to other entities in the value network and how the entities within the value network inter-relate” (Lambert 2011:7). Business models are a way to emphasise adapting and viability not just as a series of outputs but as a dynamic network that is shaped by relationships of varying size where it is important to consider who is doing business with whom (Gordijn & Akkermans 2001). Context is key (Chaharbarghi et al. 2003) as businesses develop in dynamic environments and have to constantly adapt.





## Methodology

# Adapting a digital business model to promote press freedom

## The analysis presented here focuses on the day-to-day experiences of media trying to move towards resilient models in flawed markets

The purpose was to draw the lens on the nuanced experiences of media in a variety of politically and financially pressured environments who are actively trying to seek out a more resilient business model during a digital transition. We selected these media because they were operating in regions identified as eligible for official development assistance from the Development Assistance Committee of the Organisation for Economic Cooperation and Development. In collaboration with the Danish Ministry of Foreign Affairs and WAN-IFRA we identified areas with practicable local contacts. The goal was to include a broad mix of media with varying capacities to represent a cross section of the media environments of a particular region. We used expertise on the ground and a period of due diligence to profile participant media and made case selections. Media were actively sought who were well connected and motivated to impact change.

As such this is not a representative sample of any one media type or any one media system.

The sample draws on a variety of operations publishing in many different languages. The oldest had outputs dating back a hundred years where others were less than two years old. The sample includes 23 media who had launched operations after 1997. All had digital and social media presence with 24 having print editions. Monthly unique users ranged from 1,000 to more than a million [See Appendix 1].

These cross-continental territories were all deemed to present financial or political challenges to media business organisations, being identified as lower middle or middle income countries. With the exception of South Africa, all media organisations were also operating in areas considered to be politically pressured according to 2018 World Press Freedom Index, positioned in the lowest half of all countries globally as ranked on press freedom [See Appendix 2]. The outlets were based in South Africa (4) Philippines (6) Indonesia (6) Palestine (3) East Africa (6) Malaysia (5) Jordan (5) Egypt (5) Ecuador (3) Mexico (8) and Colombia (3). Media were deemed to be operating in politically pressured settings against media system rankings and indices including Reporters Without Borders, Freedom House, IREX, and the Friedrich Ebert Foundation. The approach to seek commonalities across media territories is a particular novelty as research carried out in this way is limited.



We wanted to understand the day-to-day operations and decisions as these new media try to carve out sustainable business models in flawed markets. Therefore a longitudinal qualitative approach was taken of 54 cases in total. The data was collected in three phases across two years. Baseline data was gathered in 2016 from 31 media organisations. Ten surveys were carried out with media organisations to draw out digital changes in 2017. In May 2018, a further 24 structured surveys were carried out with site owners, editors, or digital journalists covering four areas: digital strategies and/or products implemented by the organisation to support growth in the online revenues, audiences and innovation; operational set-up in the areas of skills and knowledge, organisational structure, systems and processes and financial resources to support these digital strategies; impact of digital strategies on the business; collaboration and professional networks. We then used purposeful sampling by experts in the field to recognise media who were particularly experimental

or active in their digital business model. Three in-depth semi-structured interviews were carried out by phone in autumn 2018 with these media. This covered revenues and revenue decision making; evolution of organisational structure; partnerships and professional networks; business challenges and opportunities. Final data was also extracted from programme materials for 18 media organisations as part of final review data in 2018.

Thematic coding (Gibbs 2007) allowed content production and revenue practices to emerge, including examples of revenue rates. We have thus explored the forces and factors - both external and internal - affecting business models in digital transitions in media systems under financial and political restraint. A toolkit approach has allowed the identification of successful strategies, thus highlighting best practice and challenges.





# Unlocking Journalism Resilience

We set out business factors that contribute to sustainability and resilience in four main areas

## Challenges

We draw out lived experiences around business considerations in four main areas:

- What partnerships or networks are forming and how they may assist business resilience
- How media are responding as firms organisationally to respond to business challenges
- What digital content strategies and production techniques are being developed
- The role of audience engagement in the digital model

The business perspective is applied throughout as an underpinning thematic. However, initiatives relating to revenue models are also drawn out to show experimentation more clearly in the following main types: classified and network advertising, display, sponsored content, membership and subscription models. Digital business was particularly problematic

for media in repressed or pressured environments. Financial operations were restricted and the market classed as flawed because they could not work as normal business entities due to harassment, declining media freedoms, business pressures and restrictions, and legal complexities. Some faced specific issues relating to online registration or high levels of taxation. Media faced the added pressure of government controls on advertisers and government-controlled advertising agencies. Large telecommunication companies were noted for delivering a sizeable slice of the advertising market. Lack of data analysis, and a shortage of advertising revenues were cited as key problems. Media were concerned about digital monetisation and distribution, as well as retaining print subscribers. Publishers played a balancing act with technology giants, Facebook and Google. Nation Media Group, in the market since the 1960s, noted: “The platforms that are here and participating in the market are also helping create awareness of the new ways. So the market is evolving and as that happens of course most value goes to the platforms so we must find another way for ourselves.” Publishers had also waited for broad adoption of more digital practices in the wider market.

*“Our marketing and digital editorial teams have been working on packages to offer advertisers and digital subscribers for all our online platforms. It is still early days, but I believe that they are seeing results”*

Tiso Blackstar, South Africa

In the Philippines, the “local market is also in a kind of transition of the kind of platforms for their brands”.

Against this backdrop, digital revenues at firm level remained a struggle. All media had attempted to adapt their revenues and explored digital and social strategies in a portfolio approach. This included display, classified and sponsored advertising. Despite steps to diversify revenues, overall income from digital remained small with several media reported difficulties in articulating a reliable and viable revenue model. Sentiments of worry and uncertainty were expressed regarding revenues.

*“It’s very hit and miss. What revenue stream can be sustainable and not only experimental?”*

Sunstar.com.ph, Philippines

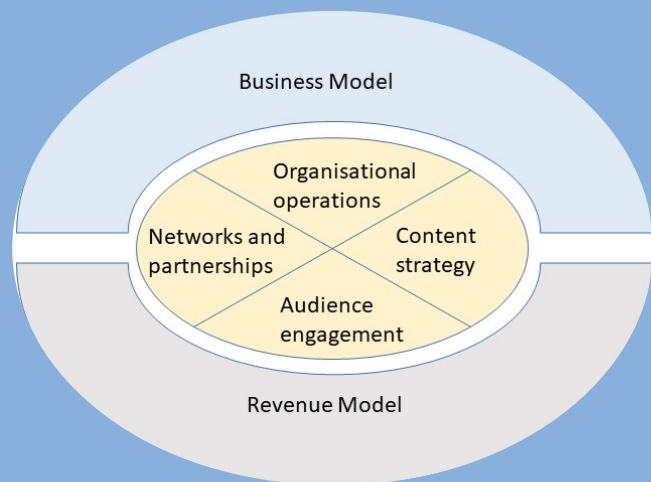


Figure 2: A framework of micro-economic factors influencing digital news business resilience

## 1. Towards Resilience: Networks and Partnerships

Publishers had increasingly turned to networks for resilience. These included forums for exchange (conferences, donor support programmes, including cooperation with UNESCO, media freedom civil society organisation Right2Know and the European Union) said to be “critical” to sustainable development. Partnerships between synergistic media or news organisations had resulted in better coverage of local media organisations. In South Africa, such engagement between newsroom managers resulted in more coverage as a news website. At GroundUp in South Africa, established since 2007, they reported: “Having that sort of relationship with those media organisations is beneficial to our growth as an organisation.”

In Indonesia, collaborations had been set up with an online news portal and local non-governmental organization on press freedom and social justice issues, and nationally across titles in Egypt. Partnerships were noted to be particularly useful when the media ecosystem was fully understood. Networks between local Kenyan media houses had made it easier for journalists to work together and rally behind particular initiatives.

*“As to the financial resources, we are made aware of the challenges we face in the age of new media and the competition we have to deal with.”*

Philippines Star



According to digital-native Newsline.ph in the Philippines it “widens our perspective and provides us the necessary tools to plan and come up with a systematic-structured and viable business plan”. International media collaborations notably between South Africa’s Tiso Blackstar Group and Norway’s Aftenposten resulted in “useful insights” in digital - first operations. Hiber in Jordan partnered with mainstream media organizations (TV, radio) and other regional websites to make joint programmes together to increase audience.

However one publisher in the Philippines had explored a content sharing agreement with a larger incumbent publisher in Hong Kong. While they were pleased to have been found and recognised, they felt the arrangement was imbalanced. “We will financially bleed. In the spirit of fair journalism and economic freedom big newsrooms should teach us what to do and we are small. They do not feel threatened but we can give them stories their readers want. Their deal is one way. They are squeezing us.”

In some cases networks were informal sharing of notes and advice between journalists for example through the Alliance of Independent Journalists, or self-help projects among journalists or WhatsApp groups. In Mexico, El Informador and El Siglo de Torreón adopted tools for better internal communication and task-sharing. In others these were more

formal work packages driven at editorial level. One had a partnership with the Bill & Melinda Gates Foundation to develop health and science reporting. In Uganda, media worked with Uganda Debt Network to address social justice issues like inequalities in education,

*“Seen as we are living in a hostile environment we should work together”*

Newsline.ph, Philippines

corruption in health facilities and unequal distribution of wealth. In Mindanao, an independent press council had formed with 50 members hosting a security summit. It brought together members of the press from different regions and newsrooms to discuss safety, security and tactical collaborations. One board member said it was a “success and a headache at the same time - the battle has just begun”. This mirrors work in Malaysia where plans had begun to form a press ombudsman and in Uganda to coordinate data and digital security training. Some raised cautions that media organisation networks were mostly from the authorities, or that insights from professional networks did not always permeate the entire organisation.

## **2. Towards Resilience: Organisational Operations**

Editors had increasingly turned to analytics to inform real-time feedback on audience preferences to suit the needs of readers. Analytics from digital and social media, guided publishers on their editorial decision

making, audience interests and what content treatment worked best. Sharing and reacting were metrics of success. Colombia's La Patria, El Siglo de Torreón in Mexico, and PlanV in Ecuador had adopted new tools for monitoring and analytics. Noroeste de Sinaloa in Mexico and The Star Radio Africa Group had implemented new analytics such as Chartbeat and a more exhaustive use of Google analytics. Performance was consistently measured across digital platforms in unique users, page views and followers. Three publishers reported the positive impact of installing monitors showing story performance statistics to inform journalists about which stories were being most read. The public display allowed journalists to see story performance in real time, select headlines, performance by subject and writer, audience engagement and retention. Malay Mail in Malaysia reported at least a 10 to 20 percent increase in visibility as a result of new digital strategies. In the Philippines, Newslines.ph had tied the revenue plan directly to place-based metrics which are used to indicate to potential advertisers reach and impact. "We can show them how we are getting big in their place."

Decisions on revenue strategies were adopted by a range of executive teams, editors and consultants drawing from information

*"Online revenues: This is still work in progress - the biggest challenge is lack of capacity in the form of personnel that can focus on this responsibility"* Ziwaphi, South africa

comparing with other sites and regular business meetings. In the Philippines, larger operations such as Sunstar.com.ph's editorial department was brought in to help with new products and innovation while at smaller and less established web-natives business advice was sought from a consultant on how to go about digital competition on social media, how to compete based on analytics, and to develop their revenue model.

Evidence suggested resource allocation across teams happened alongside growth. Nation Media Group in East Africa had grown from one publication to a range of multimedia titles. At Newslines.ph in the Philippines, staffing was continuous to allow monitoring of the site and traffic, with correspondents paid \$6 an hour, two dollars more than the usual rate. The site had grown from a one woman operation in 2016 to 14 correspondents from seven regions of Mindanao and two correspondents (in Canada and Dubai).

Convergence between print and online, or online and radio operations had happened at varied paces and approaches. El Informador, Noroeste de Sinaloa, Vanguardia, AM de Leon, El Mundo, La Patria, La Hora and El Siglo de Torreón all reported restructurings or integration in their newsroom to streamline multimedia content. At Monitor Publications Ltd in Uganda, the company had converged the digital teams of the different platforms (radio, TV and print) to work as one team and leverage skills as well as audiences. It created separate financial lines, however, for the digital teams to allow teams to work with their own budgets and plan, rather than be subject to another editorial section which might not have the same priorities. Philippines based Sunstar.com.ph integrated print and online newsrooms to cut costs and to streamline editorial processes. Print-centric marketing staff had been challenged to learn digital marketing as a response to losing print circulation and advertising revenue, and the fact that most of the audience is now online. The restructure included a new Creative Lab within the newsroom to convert news reports into multimedia and with coordinated business efforts, distinct from the marketing department. The goal was to allow a seamless offering to advertisers who wanted multimedia content elements in their campaigns. "So it is a kind of Strikeforce wherein we can create content, help advertisers and work with marketing at the same time." Tiso BlackStar (Sunday Times) in South Africa had overhauled several new work streams, all with a digital-first approach including marketing and digital editorial teams to work on packages for advertisers and digital subscribers across online platforms. Several teams detailed converged and coordinated models relying on the exchange of ideas among different teams working on specific aspects of digital strategies across photographers, reporters and social media teams through various group messaging tools.

Vanguardia, PlanV and La Hora had introduced innovation labs. Indonesian-based PT Tempo Inti Media Tbk had formed a team called MediaLab to make innovative digital storytelling and help the newsroom shape its digital workflow. A multimedia team was set up at Suara.com in Indonesia from “zero to hero - the company provided almost everything we need from camera set to studio set”. To boost revenues from online Indonesia PT Tempo Inti Media Tbk focussed on migrating and growing audiences from printed to digital products by revamping digital editions and magazines (koran.tempo.co and magazine.tempo.co) as well as the mobile app.

Newsroom resourcing was a persistent challenge across the newsrooms in this study. Many reported problems with the organizational structure, systems and processes and staff cutbacks or layoffs due to lack of resources or administrative structures. There was a tension between having the acumen for training and reorganising digital teams with lack of money. Lack of clarity in the roles of digital teams was also cited as a challenge.

### 3. Towards Resilience: Digital Content Production

Publications had diversified their outputs across print, digital (online websites and mobile applications), blogging platforms (Wordpress, Medium, Tumblr, Quora) and social media (Facebook Page, Instagram, Photobucket, Flickr, Twitter). Three sites had experimented with Facebook Live and video broadcasting. Nooun, Zahma and Al-Masry Al-Youm all introduced multimedia strategies to expand the use of social media to reach audiences more quickly and effectively. In Egypt, Nooun and Zahma also adopted new storytelling methods in reporting. Several organisations (Nooun, Zahma, Al Masry, Aramram and Al Hayat Aljadida) used mobile applications to produce investigative stories. In South Africa, Ziwaphi had built capacity on mobile video, by procuring the basics,

such as microphone to enhance sound quality of videos and a zoom lens for iPhone to gather and distribute stories quickly. Al Hayat al Jadida in Palestine said audience and readers increased because of the variety of publishing formats such as GIF, speciality in local issues, using more infographics, pictures and choosing the right format and the right tool to publish our content across website and social media.

Editors balanced good news and progressive story choices alongside hard news topics, such as abuses, trafficking and oppression to be a facilitator for change. PlanV in Ecuador had rethought their informative agenda to offer new angles on stories avoiding direct competition with traditional media. This was seen as particular value compared to correspondents not based in proximity. In the absence of independent or community-based media in Jordan, public interaction with social networks increased with social justice news issues. Uganda based Monitor Publications Ltd had worked on a new website to focus on weddings, which are an editorial priority in-country. Several sites had experimented with data journalism credited with boosting user-engagement time on sites. Malay Mail in Malaysia had used data to present text-heavy stories more visually, and successfully used more data and visuals in reporting, which in turn had helped boost readership and sharing of graphics on social media sites. Kompas.com in Indonesia had developed a multimedia long-form platform experimenting with data-driven journalism. While EL Universo, El Informador, and Vanguardia had invested in new equipment for reporters to produce multimedia content, others faced barriers to advanced digital storytelling including content management systems ill-equipped to carry complex data journalism and financial resource limitations.

*“The Star implemented the idea of digital storytelling -- writing articles and features using digital tools in compelling, emotionally engaging and interactive formats. We now put up multiple pictures and videos, GIFs, charts, links with the help of (our) web developer Wandia Karige and Code for Africa.”*

The Star – Radio Africa Group

#### 4. Towards Resilience: Audience Engagement

The Philippine Star “There has been an increase in engagement on various social issues in general aside from the light stories that social media audiences normally prefer”

Monitor Publications Ltd “When stories are written about crime especially - in Uganda currently the rising trend of kidnapping young girls and women - the audiences are interactive on social media and we see a rise in audience engagement on social media and the stories get a lot of traffic.”

Newsline.ph “We sell the content-trust and credibility of our website. We take it from there. Credible and trusted content opens the opportunity for revenue generation”

Increased engagement in social media platforms was in some cases organic, in others due to dedicated teams specifically recruited. Timely updates and live streaming contributed. Initiatives to boost audience engagement happened online by producing original content and encouraging readers to contribute their views on press freedom. Audiences were notably passionate about social- justice issues, matters of privacy, corruption and big crimes and expressed themselves across platforms when such issues were covered. Newsrooms had also experimented with how to retain online audiences by evaluating what and how content is published. Serdab Data Creative Lab in Jordan had worked to identify three audience groups to tackle audience fragmentation. They developed a strategy to divide audiences into different groups (loyal readers, website occasional readers, social media audiences) and cater to their needs differently. Greater engagement was achieved in each model. Initiatives to double the digital team and increase the use and frequency of social media by Red Pepper in Uganda led to increases in traffic. For example Red Pepper Facebook page increased from 200,000 likes to 310,000 in less than a year.

Offline engagement strategies were also evidenced. In South Africa, GroundUp had launched community meet and greets, outreach events where they visit the communities covered on the site with a printed newsletter of example stories to boost digital followers. Nation Media Group had gained some traction with exhibitions as a way to bring together advertisers, and in the process use their platforms to promote that and “translate that into value for them”.







# The Revenue Model

**We identify lived experiences of workable revenue practices that contribute to sustainability and resilience in five main areas**

## 1. Classified advertising

Generating revenues from advertising involved close adaptation to opportunities in the contextual economic environment. Classified advertising was important in two cases. Jordan based Serdab Data & Creative Lab had created a new service designed to give visibility to low-profile advertisers at minimum cost. The aim was to capture profitable revenues otherwise lost as they were unlikely to be of interest to advertising agencies. Nation Media Group in East Africa reported shrinking returns from classified but that the approach was offline to online, approaching local businesses or those “walking into the office”. Concern was raised over programmatic eroding value over time. “Because it is mostly bidding and internally we do not have the right capabilities for it yet so while we have some assets to put on the networks we don’t prioritise it and it just fills the remnants.”

## 2. Advertising networks

MCIL Multimedia Sdn Bhd in Malaysia established a premium publishers marketplace platform in March 2018, called Malaysian

Premium Publisher Marketplace Association (MPPM). It was the first and largest media consortium of a digital publisher-led programmatic advertising marketplace in Malaysia, reaching 60% of Malaysia’s digital population, with 11.4 million unique visitors per month. “Revenue is picking up every month. We continue monitoring the progress, and introduce the new digital ads format that will not compete with the publisher’s own inventory. Our challenge is to get more agencies and direct advertisers to come onboard and to sell the digital ads at a premium price.” The consortium’s goal was to provide advertisers with more control to layer their own data, audience insights and programmatic advertising across the nine contributing publishers. Advertisers buy into the network channels through demand- and supply-side providers as well as with an automated self-service dashboard giving exclusive access to real-time mobile inventory and creative advertising formats for better experience and engagement rates. The inventory is audited for brand safety by third party software to avoid advertising fraud. From November 2017, Newsline.ph joined advertising network Ambient Digital, who sell in five major south east Asian markets with a combined audience reach of 580 million. One click-based unit generates around \$450 a month, with rates and placements reviewed annually.

### 3. Display advertising

Nation Media Group in East Africa relied 90:10 print to digital revenues, and sold online display advertising as position-based inventory: the more prime the position the

#### There is a value in analytics

higher the premium against a published rate card. Having a pricing structure based on placement rather than by performance or clicks is a decision based on “the nature of the market and it’s a carry over from print and a lot of people we are dealing with that’s what they know. The market is shifting but not fast.” Hiber in Jordan developed a premium banner ad model as the purpose was to capitalize on a niche audience and preserve a clean-looking website.

### 4. Sponsored content

Fledgling but promising steps were being taken to adapt revenue incomes responding to advertiser demand through a range of sponsored and multimedia content initiatives. Five media specified new projects that extended the user experience, for example by including either an event calendar with accompanying adverts or sponsored content. In the Philippines, Sunstar.com.ph had experimented with packages selling for around \$1,000 including sponsored content combined with Facebook Live and analytics. Combined, these presented a valuable service to brands wanting to launch events or products and measure digital impact in real time. “There is value to analytics. So even the analytics we are giving it a price because it is something which is valuable to the market.” Price setting decisions were made by comparing with local television stations and video advertising. “We try to assess the value we are putting on it. Like bloggers have their own rates but we are adding the brand and reach and credibility, we extend to them that too has value.”

They had also adapted multimedia advertising units such as pre-roll video, audio, Facebook

shows and webcasting units, with production done internally. The process was described as an organic experience, finding what works and what is in demand.

In East Africa, The Star explored the use of charging corporate clients a fee for running a press release in its entirety while Nation Media Group responded to demand from advertisers wanting a narrative rather than display approach. This was said to be an experimental step for banks, telecommunication companies or betting companies wanting to drive brand building or awareness. “Most of it is just straight text stories with a video or photo and to elaborate on some of the points they want coming across. The client decides on the angle, but then it will go through an internal editorial check so that if there are any red flags that would be flagged up.” Newline.ph had two clients in a sponsored content deal from the housing and transport

*“We wish to compete with Google and Facebook and get back our market share and revenue.”*

#### MPPM ad network

industries. The publisher produced one story a month for \$400 labelled as advertorial addressing an issue identified in collaboration with the sponsor, such as safety precautions travelling in mountainous areas and initiatives the company is working on. Adapting to local environments, in Indonesia, Solopos Digital Media offered advertorial services with event activities while Standard Group in Kenya earned revenues from SMS alerts and online adverts.

### 5. Membership and subscription models

Four publishers had explored online payment differentials. Newline.ph wanted to offer a \$6 subscription for readers receiving all the website content via an email, directed by user demand. This would lead to some stories being tiered for paying subscribers only. In Indonesia, Solopos Digital Media had implemented a membership model for online services and PT Kompas Cyber Media (Kompas.com) had begun to think about paywalls and online advertising. In Mexico, Noroeste de Sinaloa’s digital subscription focussed on local content and changing the hierarchy and process of story release.

# Conclusions

## More strategic thinking, close adaptation of revenue models to the local context, and partnership opportunities contribute to a sense of resilience

The report draws on empirical longitudinal data from 54 media organisations in eleven regions: South Africa, Philippines, Indonesia, Palestine, East Africa, Malaysia, Jordan, Egypt, Ecuador, Mexico and Colombia. The main focus is to understand the deep challenges and nuances of economic experiences for media in politically and financially pressured environments in their day-to-day business operations. It finds much experimentation around digital revenues in the effort to adapt to changing digital landscapes, however the amount of revenues being generated remain small in most cases. There was no one approach to revenues or the business operations but rather an acceptance that new models would emerge through an incremental process of adaptation and experimentation.

### Towards business resilience

- Overall editors were developing more strategic thinking about business and revenues.
- Evidence suggests resource allocation across teams happens incrementally alongside growth.
- Newsroom resourcing was a persistent challenge across the newsrooms in this study.
- Convergence between print and online, or online and radio operations has happened at varied paces and approaches.

- Publishers were drawing on formal and informal networks to strengthen their resilience in terms of knowledge sharing.

### Towards revenue resilience

- Revenue models involved close adaptation to opportunities in the contextual economic environment.
- Four publishers had explored membership or subscription models.
- Many of the cases were experimenting with revenues from a variety of multimedia products including pre-roll video, text messaging and live streaming.
- Advertising pricing structures were being adapted by fitting with the close economic context.
- Partnerships within established or newly formed advertising networks offer important value capture opportunities with potential to scale.

### Towards content resilience

- Publications had diversified their outputs extensively across digital and social channels.
- Several had specified new projects that extended the user experience, for example by including either an event calendar with accompanying adverts or sponsored content.
- Content decisions were made to reflect a positive role for impact in the community as well as a unique niche compared to other media operating in the same environment.

## Recommendations and further research

The study raises interesting broader questions worthy of inquiry around how to shift economic power back to independent niche media.

While this study was able to shed light on the lived experiences of media transitioning to more digital-led operations it stops short of analysing media country by country. Drilling down in this way would illuminate challenges specific to territories and thus add to our understanding of media systems.

It would be beneficial to explore the media in this study by comparing similar media in terms of size or outputs, particularly in terms of their organisational structure as that is a known challenge. Deeper ethnographic studies on digital transition would be particularly valuable. It is unclear for example the underlying purpose and motivations of the organisation, and therefore behind revenue activities.

As is often the case with questions of media business models, data on rates and pricing is rarely available. Media remain cautious of sharing details on specific revenues and incomes, yet sharing knowledge in this way is particularly helpful in navigating digital media in terms of what works.

This analysis stops short of unpicking the factors that are to be considered when attempting to foster more networked revenue creation opportunities. More understanding is needed on the distinctions between value creation and value capture. For example, how partnerships form and who gains what from whom. This would enable media to leverage collaborations more strategically. Opportunities for partnerships may offer scalable resilient models.

Deeper insights into the direct correlation between audience engagement activities and revenues would be useful when evaluating priorities.

How to measure resilience more concretely is lacking. While revenue opportunities emerged in local context and adapted to local demand, an assessment of which revenues were the most successful in terms of moving from sustainability to resilience would speed media towards the digital shift. To evaluate the data to develop an appropriate resilience framework would be useful to the media development sector at large.

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See [clarecookonline.com](http://clarecookonline.com) & [mediainnovationstudio.org](http://mediainnovationstudio.org) (@cecook)

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# Appendix

## Appendix 1: The sample cases by region and overview

REGION	PUBLICATIONS	DESCRIPTION MONTHLY WEBSITE UNIQUE USERS (UU) AS AT 2016.
South Africa (4)	Ziwaphi (GroundUp)	An English digital, print and social media offering established in 2007
	City Press	Running since 1982 City Press is a South African news brand that publishes on multiple platforms. Its flagship print edition is distributed nationally on Sunday, and it has a daily newsletter, online platform, and other social media platforms. These include Twitter, Facebook, Instagram and YouTube.
	Tiso Black Star (Sunday Times)	Based in Johannesburg, formerly known as Johnnic Communications, Avusa and Times Media Group operating since 1906
	The Herald (Tiso Blackstar Group)	The Herald is Port Elizabeth's leading local daily newspaper. With a heritage of over a century of award-winning journalism, the newspaper focuses on serving the Nelson Mandela Bay metro with excellent coverage of municipal affairs and local politics, regional business, sports and entertainment.
Palestine(3)	Al Hayat al Jadida	Established in 1995 a website that is independent but aligned with national authorities.
	WAFA <a href="http://english.wafa.ps/">http://english.wafa.ps/</a>	The Palestinian news and information agency began in April 1972 as independent with high profile investigations and good training.
	Philippines (6)	Inquirer Publications Inc - Cebu Daily News
Sun Star Publishing Inc.		Dating back to 1984, publishing in Bisaya and English, the site Sunstar.com.ph has 1,600,000 UU.
<a href="http://www.newsline.ph">Newsline.ph</a>		A new initiative launched in 2016.
Manila Standard (The Standard)		English website and print with 120,000 UU established in 1987.
Philippine Star		Established in 1986, is a print and digital newspaper in the Philippines and the flagship brand of the PhilStar Media Group.
Philippine Business Mirror Daily Publishing, Inc.		English digital and print title started in 2005.
East Africa (4)	The East African Newspaper	Nairobi-based The East African online and weekly print editions and searchable online archive that dates back July 2000. Part of the Nation Media Group it also offer a variety of web-only content. It is available in Kenya, Uganda, Tanzania and Rwanda every Saturday.
	Daily Monitor, Monitor Publications Ltd Uganda	Daily Monitor is a subsidiary of Monitor Publications Ltd, which is owned by The Nation Media Group and five other individual shareholders. Daily Monitor was established as an independent daily newspaper, The Monitor, and relaunched as Daily Monitor in June 2005
	Red Pepper, Pepper Publications Ltd	Publishing in English, Luganda and Runyankole print, web and social media. Website traffic at 178,000 UU. Started in 2003. Eight senior employees of the Kampala-based tabloid were arrested in 2017 during an anti-terrorist police raid on Red Pepper's headquarters



	Nation Media Group	Established in 1959 is the largest independent media house in East and Central Africa with operations in print, broadcast and digital media, which attract and serve unparalleled audiences in Kenya, Uganda, Tanzania and Rwanda. As a brand, we are committed to generating and creating content that will inform, educate and entertain our consumers across the different platforms, keeping in mind the changing needs and trends in the industry.
	The Star – Radio Africa Group	Established in 2007 with multimedia channels and outputs
	Standard Group	History in publishing dating back to 1902
	Malay Mail Online. Trinity Diligent Sdn Bhd	Digital offering in Bahasa, Malaysian and English established in 2013 Trinity Diligent Sdn Bhd, through its subsidiary Malay Mail Sdn Bhd, publishes an online newspaper. The company is based in Petaling Jaya, Malaysia.
	MCIL Multimedia Sdn Bhd	Chinese diaspora media Sin Chew Daily, established in 2010 owns and operates video cloud platform websites under the brand name Pocketimes and LogOn. The Pocketimes website operates as a news channel catering to mobile audiences. The LogOn website operates as an e-commerce platform for small and medium enterprises. The company is based in Petaling Jaya, Malaysia. They have launched the first publisher-led programmatic advertising marketplace in Malaysia: <a href="https://mppm.my/">https://mppm.my/</a>
	Kumpulan media Karangkrif (Sniar Harian)	Print product in Bahasa Malaysia and website with 1,000,000 established from 2006 . Since then, the country's first state customized national newspaper, with eight editions and with its transparent and neutral reporting style has carved its niche in the Malaysian media landscape. It delivers national, state and community news
	Malaysiakini	Print and digital production in Bahasa Malaysian and Chinese with 300,000 UU from 1999 s an online news portal published in English, Malay, Chinese and Tamil. Malaysiakini claims that its site now receives over 2.3 million page-views per day on desktop and mobile. It has been ranked as the 13th most popular website in Malaysia in 2015. Created a web metrics tool that is used by some donors: <a href="http://www.metrics.news">www.metrics.news</a> . <a href="https://m.malaysiakini.com/">https://m.malaysiakini.com/</a>
	Fajar Group (Radar Selatan) Daily Newspaper	Indonesia offering since 1981 with 10,000 UU <a href="http://radarselatan.fajar.co.id/">http://radarselatan.fajar.co.id/</a> standing for independent and freedom of expression
Jordan (5)	Heba Al-hayah Obeidat	Independent journalist
	Aramram web tv	Arabic broadcaster with English subtitles gaining 12,000 UU since 2010. Aramram is the first Arabic TV station to be broadcast over the Internet from Amman aimed at the Arab youth. Aramram attempts to promote convergence. A focus on our societies in images based on cultural and cultural heritage. The mission is to provide an interactive space to open a dialogue between all groups. An area of public-demand video content and by presenting Jordanian talents, geography and creative abilities, providing Jordanians with a free platform to showcase their work.
	Amman.net	Web native operating since 2007 <a href="http://ar.ammannet.net/">ar.ammannet.net/</a> its aim is to be an independent media organization that enjoys freedom, credibility and positive impact . The Community Media Network is a non-profit organization founded and managed by Dawood Kuttab . The network is managed by Radio Al Balad and its Amman Net website.

	Hiber (7iber)	Web native 1,836 UU is a media organization and online magazine that seeks to promote an open society that upholds values of accountability, rule of law, human rights, and pluralism, through in-depth multimedia journalism, critical analysis and public conversation. 7iber's main activities are: producing and publishing original multimedia journalism and analysis, and providing a platform for critical conversation; extending the conversation by organizing public talks and debates; conducting research on Internet governance and digital rights conducting trainings and workshops on various aspects of online media 7iber began in 2007 as a citizen media platform with the initial costs of the website covered by its founding members. Since 2009, 7iber has grown into a media organization that is a registered LLC in Jordan, and financed through grants and media projects.
	Serdab data & creative lab (M. Atout)	Independent journalist formerly of Hiber
Egypt (5)	Masrawy	Established 1999 is an Arabic Egyptian news web portal It operates under the ONA institution for press and media which owns YallaKora, ONA and Elconsolto websites and Gemini media company. It presents Arabic-language news, commentary, and lifestyle articles directed at the Middle East and wider Arabic-speaking community.
	Nooun	Around 1,500 UU since 2013 an open blogging platform that aims to encourage story sharing.
	Almasry Alyoum	Arabic site since 2003 is an Egyptian privately owned daily newspaper that was first published in June 2004. It is published in Arabic as is its website, almasryalyoum.com. An English version of the website was introduced in 2009 as the Al-masry Al-youm English Edition, which later evolved into Egypt Independent.
	Cairodar	Arabic site reaching 300,000 UU since 2013 cairodar.com
	Zahma	Spanish site since 1960 <a href="https://zahma.cairolive.com/">https://zahma.cairolive.com/</a> Aiming to be an exciting news site for young people and adults, focused on the important news, useful information and attractive entertainment with visitors browsing a million pages a month online.
Ecuador (3)	Planv	Web native since 2013 <a href="http://www.planv.com.ec/">http://www.planv.com.ec/</a> a journalism web portal of public interest it works to take a deep look in stories that seek to shake the social conscience, to contribute with the construction of a society with solid democratic values, critical and vigilant.They work to clarify the facts that affect the economic or political powers of the people.
	Diario La Hora	Spanish outputs in digital print and social with 80,000 UU since 1982 La Hora is the newspaper with the most regional editions in Ecuador . La Hora focuses on local and provincial news without neglecting national and international news. It is published in Quito, Esmeraldas, Tungurahua, Santo Domingo de los Tsáchilas, Imbabura, Carchi, Loja, Los Rios, Zamora Chinchipe and Cotopaxiin different editions in each region, as well as an additional national edition. Both print and online and a series of magazines about each region.
	El Universo	Since 1921 Diario El Universo is one of the largest daily newspapers in Ecuador. Its headquarters are located in Guayaquil. The newspaper has been published since its foundation with only small interruptions during the dictatorship.
Mexico (8)	El Diario de Juárez	Since 1976, digital print and social media The El Diario de Juárez is an independent newspaper founded on February 17, 1976 by Osvaldo Rodríguez Borunda, who since then has been its general director.

	Grupo Megamedia (El Diario de Yucatán)	Website traffic 112,000 heritage since 1869. Diario de Yucatán has carved an evolutionary history that today allows it to put objective and credible information within the reach of any audience expounding the scope of the newspaper created by Carlos R Menéndez González in 1925. With an informative impact that reaches 2.2 million people, product of 199,500 daily readers of the printed newspaper and a community of 2 million followers on digital platforms, has its main audiences in the socioeconomic segments ABC + . The brand Diario de Yucatán is disseminated through various platforms print web and social in text, audio and video.
	El Siglo de Torreón	Website traffic 250,000 since 1922. A daily paper in the Comarca Lagunera, Mexico. It was founded in 1922 in Torreón, Coahuila by Antonio de Juambelz y Bracho under the direction of Joaquin Moreno.
	Vanguardia	Website traffic at 3,850,000 UU publishing since 1975 <a href="https://vanguardia.com.mx/">https://vanguardia.com.mx/</a> aimed at “enlightening” society by creating, collecting and distributing high quality news, information and entertainment and active participation in the development of our community
	El Mundo de Córdoba	Publishing in Spanish since 1960s.
	AM de leon	Dating back to 1978 now online at extensive site <a href="https://www.am.com.mx/">https://www.am.com.mx/</a>
	Noroeste de Sinaloa	Website traffic at 40,000UU publishing since 1975 <a href="https://www.noroeste.com.mx/">https://www.noroeste.com.mx/</a>
	El Informador	Website founded in 1917 with site traffic reaching 100,000 UU. <a href="https://www.informador.mx/">https://www.informador.mx/</a> carving out a niche as the first source of information in western Mexico.
Indonesia (6)	PT Jujur Bicara Papua ( Tabloid Jubi	Bahasa site launched in 2001.
	Tribunnews.com	An Indonesian online news site published by PT. Indopersda Primamedia headquartered at Kompas Group of Regional Newspaper Building Jakarta Pusat . A Kompas regional newspaper division provides local, national, and international news provides electronic paper (epaper) as a replica of the printed edition newspaper, online, discussion forums and several online communities. In 2014 , Tribunnews News Portal according to Alexa was in the top three after Detik.com and Kompas.com. This News Portal is supported by 500 journalists from 22 Local newspapers in 19 cities.
	Kompas Cyber Media PT Kompas Cyber Media (Kompas.com)	<a href="https://www.kompas.com/">https://www.kompas.com/</a> A digital-forward media company based in Jakarta, Indonesia. They have been online since 1998 and have worked with a variety of clients across industries from banks and automotive to technology brands. Their media kit presents a one of a kind media with box-less thinking . Publishing in Bahasa and English.
	PT Tempo Inti Media	200,000 UU a brand that has been established since 1971 The business is classified into two segments: publishing and printing. Its flagship product is Tempo, a weekly news magazine. It also publishes Koran Tempo, which is a daily newspaper; Tempo English, which is an English edition of Tempo, and Tempo.co, which is an online news portal. Some other products of the Company include Majalah Aha!, a monthly children magazine, and various lifestyle magazines, namely Travelounge and KOMUNIKA. The printing business is operated by its subsidiary, PT Temprint.
	PT Aksara Solopos	An Indonesian daily newspaper published in the city of Surakarta, Central Java. First published on September 1997, it is published by PT. Aksara Solopos (which is mostly owned by the business daily Bisnis Indonesia). The daily is known as the major newspaper in the city and surrounding areas. 900,000 UU.

	Suara Pembaruan (Berita Satu Media Group)	An Indonesian talk channel Part of the Lippo group, the website has 3,000 UU, established 1990.
Colombia (3)	El Colombiano	<a href="http://www.elcolombiano.com/">http://www.elcolombiano.com/</a> The Colombian is the leading newspaper in Antioquia Department in Colombia whose headquarters are located in Medellín. The first edition of this newspaper was published on February 6, 1912 Part of Periódicos Asociados Latinoamericanos (Latin American Newspaper Association), an organization of fourteen leading newspapers in South America.
	El Universal	Since 1948 also on digital and extensive social media available at <a href="https://www.eluniversal.com.co/">https://www.eluniversal.com.co/</a> professional media kit and advertising offerings <a href="https://www.eluniversal.com.co/mediakit/">https://www.eluniversal.com.co/mediakit/</a>
	La Patria	Regional newspaper of high quality <a href="http://www.lapatria.com/">http://www.lapatria.com/</a> Also runs two portals <a href="http://www.micasa.co">www.micasa.co</a> <a href="http://www.qhubo.com/epaper/manizales/">www.qhubo.com/epaper/manizales/</a>

## Appendix 2: Overview of financial and political environments where the sample media operate.

REGION	FINANCIAL AND POLITICAL RESTRICTIONS
Colombia	Ranked 31/100 partly free by Freedom House and as an upper middle income DAC country. Ranked 130 out of 180 countries in the world rankings in 2018 World Press Freedom Index by Reporters Without Borders with a score of 41.03
Mexico	Ranked 40/100 partly free by Freedom House and as an upper middle income DAC country. Ranked 147 out of 180 countries in the world rankings in 2018 World Press Freedom Index by Reporters Without Borders with a score of 48.91
Palestine	Press freedom in Palestine is also affected by divided sovereignty. Ranked 134 out of 180 countries in the 2018 World Press Freedom Index by Reporters Without Borders with a score of 42.96.
South Africa	Ranked 25/100 partly free by Freedom House and as an upper middle income DAC country. Ranked 28 out of 180 countries in the world rankings in 2018 World Press Freedom Index by Reporters Without Borders with a score of 20.39
East Africa	Uganda is ranked as partly free 41/100 by Freedom House and as a DAC least developed country. It is ranked 117 out of 180 countries in 2018 World Press Freedom Index by Reporters Without Borders with a score of 20.39. Kenya is also a DAC low income country ranked 96 out of 180 countries in the world rankings with a press freedom score of 30.82.
Jordan	Ranked 49/100 partly free by Freedom House and as lower middle income DAC country. Ranked 132 out of 180 countries in the world rankings in 2018 World Press Freedom Index by Reporters Without Borders with a score of 41.71
Indonesia	Ranked 46/100 partly free by Freedom House and as lower middle income DAC country. Ranked 124 out of 180 countries in the world rankings in 2018 World Press Freedom Index by Reporters Without Borders with a score of 39.68 .
Philippines	Ranked 31/100 partly free by Freedom House and as lower middle income DAC country. Ranked 133 out of 180 countries in the world rankings in 2018 World Press Freedom Index by Reporters Without Borders with a score of 42.53
Malaysia	Ranked 45/100 partly free by Freedom House and as upper middle income DAC country. Ranked 145 out of 180 countries in the world rankings in 2018 World Press Freedom Index by Reporters Without Borders with a score of 47.41
Egypt	Ranked 72/100 partly free by Freedom House and as lower middle income DAC country. Ranked 161 out of 180 countries in the world rankings in 2018 World Press Freedom Index by Reporters Without Borders with a score of 56.72



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