European Newspapers' Digital Transition: New Products and New Audiences

La transición digital de los diarios europeos: nuevos productos y nuevas audiencias

ⓘD Dr. Simon Peña-Fernández is Associate Professor in the Department of Journalism II at the University of the Basque Country in Bilbao (Spain) (simon.pena@ehu.eus) (http://orcid.org/0000-0003-2080-3241)

ⓘD Dr. Iñaki Lazkano-Arrillaga is Assistant Professor in the Department of Journalism II at the University of the Basque Country in Bilbao (Spain) (inaki.lazkano@ehu.eus) (http://orcid.org/0000-0001-6473-5290)

ⓘD Dr. Daniel García-González is Associate Professor in the Department of Journalism II at the University of the Basque Country in Bilbao (Spain) (daniel.garcia@ehu.eus) (http://orcid.org/0000-0002-9566-308X)

ABSTRACT

The adaptation of traditional newspapers to new digital media and its interface, far from being a mere technical transformation, has contributed to a gradual change in the media themselves and their audiences. With a sample including the top general information pay newspaper in each of the 28 countries of the European Union, this research has carried out an analysis using 17 indicators divided in 4 categories. The aim is to identify the transformations that the implementation of digital media have brought to the top European newspapers. In general terms, the results show that most dailies have managed to keep their leadership also in online environment. Moreover, an emerging group of global media is growing up, based in preexisting national media. Digital and mobile media have contributed to the appearance of new consumption habits as well, where users read more superficially and sporadically. The audience uses several formats at a time, and digital devices already bring the biggest amount of users to many media. The Internet-created new information windows –search engines, social networks, etc. –are also contributing to the change in professional work routines.

RESUMEN

La adaptación de los medios de comunicación tradicionales a los nuevos soportes digitales y su interfaz, lejos de constituir un mero ajuste técnico, ha contribuido a una paulatina transformación de los propios medios y sus audiencias. En una muestra integrada por los diarios de información general y de pago líderes en los 28 países de la UE, y mediante el análisis de 17 indicadores distribuidos en cuatro categorías, este artículo busca identificar las transformaciones que la implantación de los soportes digitales han provocado en las principales cabeceras de la prensa europea. En términos generales, los resultados de la investigación señalan que la mayoría de los diarios no sólo han logrado mantener su liderazgo en la Red, sino que en algunos casos también se está alumbrando un incipiente conjunto de medios globales a partir de medios nacionales preexistentes. Los soportes digitales y móviles también han favorecido la aparición de nuevos hábitos de consumo, caracterizados por una lectura más esporádica y superficial por parte de los usuarios, y han configurado una audiencia que ya en muchos casos es multisoporte, y donde los dispositivos digitales aportan ya la mayoría de lectores a muchos medios. Asimismo, las nuevas ventanas de acceso a la información –buscadores, redes sociales, etc.– generadas por Internet, también están contribuyendo decisivamente al cambio de las rutinas y las formas de trabajo de los propios medios.

1. Introduction and state of affairs

Since the appearance of the first Internet media two decades ago, theoretical discourse about its development have ranged from technological determinism to constructivist approaches. In the first end (Mosco, 2004; Boczkowski, 2004), the media analysis focused on trying to anticipate the «communicative utopias» and the revolutionary changes that the development of the full potential of the Internet would produce in the communication system and journalism, on the basis that all technological innovation inevitably causes social change (Paul, 2005; Domingo, 2006). However, approaches centred on the way audiences and professional journalists' routines have interacted with technical advances have offered a vision in which, far from pre-established developments, production practices, new formats and technological tools have opened the discussion and have shaped one another (Deuze, 2001; Schmitz & Domingo, 2010).

The emergence of Web 2.0 –focused on the development of applications and websites that allow users to create, distribute and share content– has contributed to the creation of what Jenkins (2006) calls a «culture of convergence», where the long separation between content creators and their audiences has begun to dilute, although, as concluded Steensen (2011), it may be considered that the traditional notion of «gatekeeping» is still in full force and assumed by the media.

Beyond the role of the audience, digitalization and leap to the web continue to lead profound changes in the media landscape, ranging from content production to work routines, media, distribution strategies and business models (Casero-Ripollés, 2012).

Faced with statements predicting the demise of paper as printed media (Martinez-Albertos, 1997; Meyer, 2004), newspapers have had to face a significant drop in advertising investments and dissemination, so digital media appears to be a great alternative for the future of print journalism (Armentia, 2011).

This necessary adaptation to the new digital media can be understood, on the one hand, from a purely technical aspect, which refers to the adequacy of editorial content of cyber media on new information devices (smartphones, tablets, etc.) (Meso, Larrondo, Peña, & Rivero, 2014). But this transition is not limited to a change in format, but rather has contributed to a deeper transformation in the configuration of the media.

Unlike print journalism, which has very definite design techniques result of technological and formal evolution of the medium itself over decades, digital newspapers were born with a very simple and vague visual composition, which has evolved into a certain visual uniqueness, far from the nuances of the daily paper (Lopez, 2012). As defined by Rodriguez-de-las-Heras (1991) –unlike paper– screen is not only a surface, but rather a place of contact between the two areas where the manner of working gives the interface as a result.

The screen is, in effect, a space that integrates the different types of information and a socialising forum where virtual communities are created. As Díaz-Noci (2009) notes, in new digital media both product media and the reading strategy are dynamic, and websites are representations and constructions of the information the reader, through active intervention, recovers in a certain way, making use of an interface. The reader develops reading strategies such as tracking, searching, exploring or wandering, and waiting for the search for information to establish a dialogue with other texts, thus going from hypertextuality to intertextuality.

2. Material and methods

This research aims to identify the main transformations that development and implementation of digital media has provoked in the top European newspapers. In relation to this general objective, the following hypotheses are specified:

• H1: The main European media groups have succeeded in carrying over their leadership from print to screen, and they have also become noteworthy in diverse digital media.

• H2: Based on existing traditional newspapers, online newspapers have generated new consumer habits and new audiences.

• H3: The consumption of digital media shows a tendency towards a cross-media usage, in which now only a small proportion of the total audience comes from print editions.

• H4: The new digital media contain specific characteristics that have transformed the structure and the design of the media.

The sample utilised to carry out the study is comprised of the leading general information newspapers sold in each of the 28 countries of the European Union. For their identification, the broadcast data audited by the agencies belonging to the IFABC (International Federation of Audit Bureaux of Circulations) was used and have been completed with information provided by the European Journalism Centre and Eurotopics.

The final list of the media analysed, classified by order of greater to lesser circulation is the following:

«Bild» (Germany), «The Sun» (United Kingdom), «Kronen Zeitung» (Austria), «Ouest-France» (France), «De Telegraaf» (The Netherlands), «Corriere della Sera» (Italy), «Fakt Gazeta Codzienna» (Poland), «Helsingin Sanomat» (Finland), «El País» (Spain), «Aftonbladet» (Sweden), «Blesk» (Czech Republic), «Slovenske Novice» (Slovenia), «Het Laatste Nieuws» (Belgium), «Blikk» (Hungary), «Click» (Romania), «Correio da Manhã» (Portugal), «Irish Independent» (Ireland), «24 Sata» (Croatia), «Nový Cas» (Slovakia), «Politiken» (Denmark), «Luxemburger Wort» (Luxemburg), «Trud» (Bulgaria), «Postimees» (Estonia), «Latvijas Avize» (Latvia), «Lietuvos Rytas» (Lithuania), «Ta Nea» (Greece), «Times of Malta» (Malta) and «Phileleftheros» (Cyprus).

Following to the proposed hypotheses, the following categories have been established in order to carry out a descriptive statistical analysis, in accordance with the cybermetrics guidelines described by Alonso, García & Zazo (2008) and Rodríguez, Codina & Pedraza (2010):

a) Popularity and area: number of visits (visitors in the past six months), position in the national ranking, percentage of national traffic and geographic distribution of visits.

b) Reading habits: average time per visit, pages visited and «bounce rate» (users who spend less than 30 seconds to visit the website).

c) Cross-media: applications for mobile devices (Android and Apple).

d) Structure of consumption and design: direct access to the URL, access from links on other websites, search engines, social networks and number of followers in each (Facebook and Twitter), email and visits from sponsored links. For categories a), b) and d),

data was used obtained through specialised websites Alexa and SimilarWeb in April 2015. The estimates provided are checked against the data audited by IFABC (2013), ComScore and OJD Interactive to ensure that, regardless of its accuracy, they have the validity needed to establish comparative studies. For the third category of analysis has been performed a quantitative analysis of the applications published by the publishers of newspapers in Google Play and App Store. Finally, in the fourth category of analysis, the data provided by social networks was incorporated (Facebook and Twitter).

3. Analysis and results
3.1. The online leadership of traditional European press

The study conducted supports the conclusion that the popularity and attractiveness of the traditional newspapers remains an important asset for the online media. Of the 28 newspapers analysed, all of them leaders in national circulation in their print edition, 18 (64.3%) also managed to make a place among the three most consulted media on the Internet in their respective countries. The consolidation of this leadership is even more remarkable considering that all of them must compete with media arriving from other formats (television, etc.) and also with native media created, in
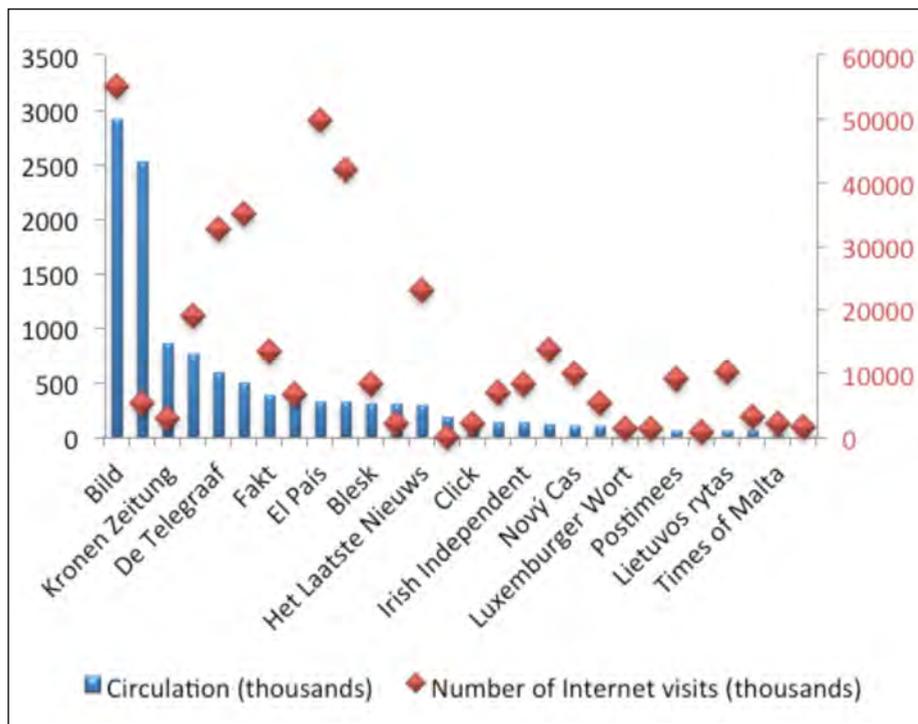

Figure 1. Circulation and Internet audience of main European newspapers.

some cases, by large telecommunications companies. Therefore, the greatest weight in the consumption textual information on the Internet favours a predominance of printed media source in the panorama of European online media.

The list of the media that do not manage to transfer their position of dominance to the Internet (one in every three) also lends itself to some significant interpretations, as it includes some of the newspapers with the greatest print circulation figures in this study.

On the one hand, the sensationalist «The Sun» is an excellent example of the change in business model of digital newspapers, whereby the maximization of readership numbers is foregone in favour of constructing a community of digital subscribers (Arrese, 2015). Since the beginning of its adoption of a paywall, created in August 2013, «The Sun+» offers information packages at a price of two pounds Sterling per week, which give access to all the newspaper content and to specific mobile applications. With more than 225,000 subscribers, this business model –also used by «The Times»– is one of the most successful among communication companies.

The case of the French daily «Ouest-France», on the other hand, points to another change in the models of success among online newspapers. Sales of the print edition of this regional newspaper edited in Rennes – 733,000 copies daily in 2014 – double those of the main national newspaper, the conservative «Le Figaro» (OJD, 2014). However, the «Ouest-France»'s positive Internet data are not enough to assure its dominance, and its number of visitors hardly amounts to half of those achieved by nationwide publications like «Le Monde», «Le Figaro» itself, or the sports paper «L'Equipe». These differences worsen in the case of other newspapers in the booming regional French press, like «Sud-Ouest», «La Voix du Nord» or «Le Dauphiné Libéré», and are also extended to other markets, such as in Spain, where leading local and regional newspapers such as «La Voz de Galicia», or «El Correo» find that native web-based media of short lifespan such as «El Confidencial», «Libertad Digital» or «Público» manage to achieve comparable numbers of visits.

3.2. New habits, new audiences

The process of gradual expansion of the areas of circulation has also favoured the incipient appearance of new global communication media and new markets. Beyond the traditional boundaries of press circulation, the Internet has made it possible for the media to reach very considerable audiences in markets that were previously residual. Against an almost exclusively national consumption of their traditional media, the leading European newspapers receive 22.9% of their online visits from abroad.

Diverse factors influence the global consumption of media whose character is, at least initially, national, regional or local. Firstly, areas of linguistic influence mean that political borders can be overcome, which facilitates, for example, a significant number of visits to the sensationalist German «Bild» from other German-speaking countries, such as Austria or Switzerland where it numbers among the most visited media.

Digital media audiences also cause the cultural and historical links that blur political borders to flourish. As such, it is not surprising that the tabloid «Blesk», the Czech version of the Swiss tabloid «Blick», receives over 10% of its readers from neighbouring Slovakia, or that 8% of readers of the Estonian paper «Postimes» visit the site from Finland.

In addition, the impact of emigration is not to be ignored; in some cases emigrants can account for a significant number of visits to the important communication media of their home countries. Sizeable communities residing abroad explain, for example, why the Cypriot «Phileleftheros» receives almost 30% of its visits from Greece and the UK –principal destinations for its large emigrant community–, or why almost 20% of readers of «Irish Independent» come from the USA, and 13% from the UK.

These frequently overlapping linguistic, historical and migratory factors are contributing to the progressive dilution of the traditional correspondence between the politico-administrative borders and the distribution of communication media. As a result, this newfound audience profile is gradually giving rise to new global media.

Throughout history there has certainly been no lack of media of international vocation. The BBC, which currently provides information in 32 languages via its website, has been an excellent example for decades. The press has not been immune to these products, and the «International New York Times» (formerly the «International Herald Tribune») still sells 220,000 copies in 180 countries (The New York Times, 2014).

However, the Internet has meant that some media have transcended their national character to gradually become global media as a result of gradual internationalisation. An excellent example of this transformation is the centenary British tabloid «Daily Mail», whose online audience has little to do with what might be expected of a sensationalist and conservative British

tabloid. On the contrary, the «MailOnline» has established itself as a genuine global medium, in which only 17.6% of its visits from the United Kingdom. Significantly, the newspaper founded by Alfred Harmsworth receives twice the number readers from the United States than from the UK (34.2%), and reaches on the other side of the Atlantic the second place between the most read traditional newspaper on the Internet, only behind the «The New York Times» and ahead of national newspapers like «USA Today», «The Washington Post» or «The Wall Street Journal». The newspaper also occupies a place of honour in countries like Australia, Canada, the Philippines, India, Ireland, New Zealand, South Africa and Singapore, among many others.

The case of the «Daily Mail» is probably one of the most striking, but not the only one. «The Guardian», for example, has also suffered an online transformation that is no less revealing. The 185,000 copies sold for the paper edition of this almost 200-year-old English newspaper do not allow it to take a place among the ten most popular newspapers in the UK press, dominated by the tabloids, while reference newspapers in the conservative court like «The Daily Telegraph» and «The Times» double its circulation. Online, however, it rises to second place among British newspapers though, as with the «Daily Mail», only one in five of its readers (19.4%) come from the islands. Its main market is also United States (33.9%) and it has a large number of readers in other English-speaking countries.

This growing internationalisation, which contributes to the creation of new global media from pre-existing national media, is not unique to the Anglo-Saxon field. In Spain, two leading Internet media sites, «El País» and «Marca», have one in three visitors from other countries, mainly in Latin America (35.9% and 34.4%, respectively). In the case of «El País», this transformation has led to a mutation in the identity of the medium itself, with the change in October 2007 from its original slogan «Independent morning newspaper» to «Global newspaper in Spanish». Since the inclusion in November 2013 of an online edition in Portuguese for Brazil –which added to the pre-existing generic for America– the caption was abbreviated to «Global newspaper».

3.3. Multi-format digital media consumption

If the Internet has had a big impact when it comes to blurring the boundaries in the distribution of content and to creating new global media, the extended use of mobile devices, such as smartphones and tablets, and

the mobile Internet broadcast signal, have meant that all media, and the major European newspapers by extension, have found powerful allies to increase their audiences in the new media, a «fourth screen», favouring a distribution alternative for their messages (Aguado & Martinez, 2009).

These formats, far from being a mere supplement to the audience of newspapers in their traditional medium, in some cases constitute the main source of influx of readers. The case in the UK is a clear example thereof. According to the latest data from the comprehensive National Readership Survey (2014)[1], 62.6% of the readers from the eight major newspapers of the British press access newspaper information from their personal computers and mobile devices. Particularly significant is the case of «The Guardian», with a total audience of only 9% who read only the printed version, similar to the figures also shown by «The Daily Telegraph» or «The Independent». At the other end still remain «The Sun» and «The Times», whose rigid commitment to paywalls on the Internet
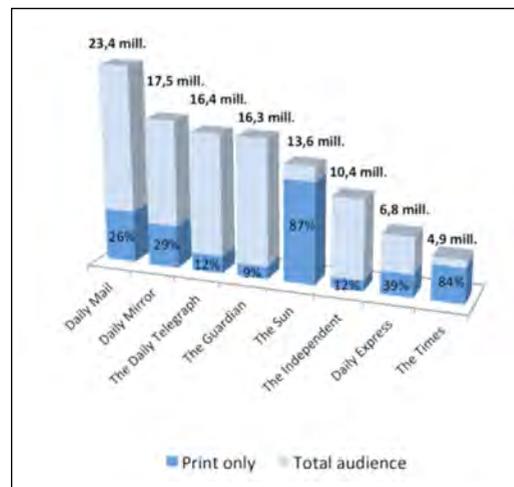

Figure 2. Audience of British newspapers.

and mobile devices causes four out of five of its readers only read print editions.

The analysis of data from British newspapers, similar to the report from the Pew Research Center (2015) providing data on the American press, clearly shows a gradual transformation of newspapers on multiplatform products, which are consumed together and interchangeably through various media (paper, computer, mobile devices).

This new source of influx of readers has promoted a tendency in favour of applications for mobile devices. Except for the Greek political newspaper «Ta Nea» and the Romanian tabloid «Click», all leading

European newspapers have developed at least one specific application. By type, besides the obvious adaptations of information content of the web editions, complementary services for mobile devices include specialised applications for thematic sections (sports, etc.), special coverage of events or dates, or commercial content.

Overall, its success, however, can be described as relative. Even though all the newspapers analysed offer free downloads, according to data offered by Google Android Play, only three of them (10.7%) have achieved over one million downloads of their applications, compared to thirteen who have achieved less than one hundred thousand (46.4%).

Specific applications for mobile devices, in effect, add to difficulties in becoming new windows for the consumption of digital media among users. For one, its exclusive character, which requires a customised download, collides with the global kiosk that can be accessed through a browser screen. The constant changes in the media and the inevitable and constant application updates neither add fluency in use. In addition, the technical limitations cause that some of the contents can not be shown in the applications themselves, which also limits their possibilities. But above all, probably the main obstacle to their development is the generalisation of responsive web design, which allows the correct visualization of the contents of a page on any device, and causes in many cases that specific applications render superfluous.

For the media, meanwhile, the creation of multiplatform content does not imply an added difficulty in the production process, since the publication in increasingly varied formats and media is already developed in most newsrooms through fully integrated content management systems (CMS) (López-Torregrosa, 2013).

3.4. New windows of access to information

Traditionally, regardless of the format, the press has understood that the front pages of newspapers were the windows from which readers could peer into its contents. Its unique importance made them extremely synthetic and strongly hierarchical spaces, governed by stable conventions for decades.

The implementation of the media and digital formats has forced media to rethink this concept to a much greater extent based on the influence of consumption of their audience rather than purely technical criteria (Peña, Perez, & Genaut, 2010).

Front pages have become big display windows for all the contents in the newspaper, like products stacked up in the halls of a large bazaar. Even though the
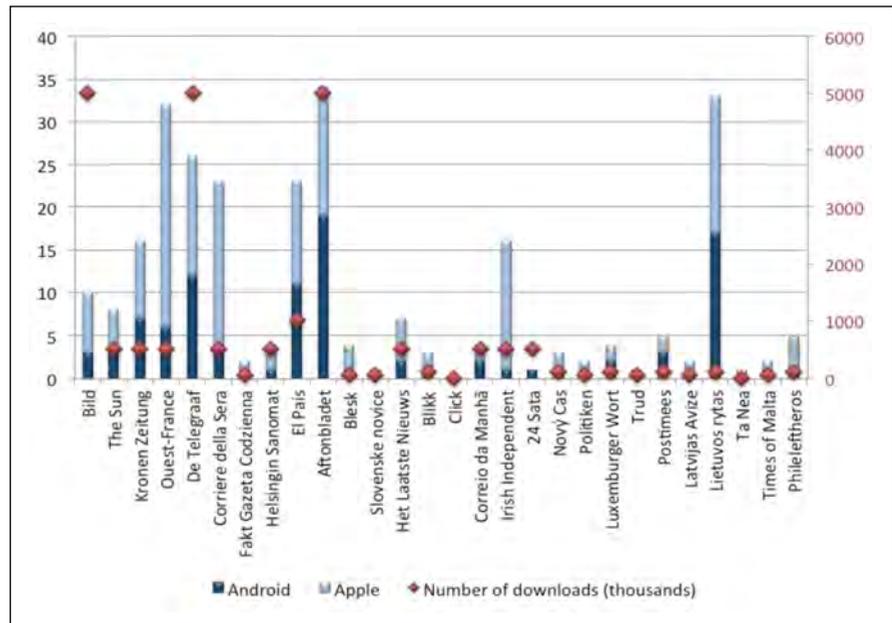

Figure 3. Number of mobile apps developed by European newspapers.

structure has been rationalised little by little, the information exuberance remains one of the hallmarks of European newspapers online, with front page surfaces on their web editions that increase the format and number of informative texts and images on the printed front page version tenfold.

There are several reasons for this change. For one thing, a lot of readers go over content superficially and sporadically (Milosevic, Chisholm, Kilman, & Henriksson, 2014). In terms of cybermetrics, the term «bounce rate» was coined to define the number of visitors who spend less than thirty seconds on the website before moving on to something different. In the case of European newspapers, the average of this «bounce

rate» amounts to 50.21% of visits.

The analysis of other indicators applied to 28 major European newspapers corroborates this epidermal consumption trend of information in digital media, since the average page views per visitor amounts to 3.57 and the average length of the visit is something more than six minutes (361.46 seconds). Therefore, the main page takes on a special significance, not as the synthesis of a product to be consumed as a whole, as usually happens with newspapers or radio or television news, but as a product index trying to show everything it has to offer on a single page.

However, data on the origin of the access downplays the importance of the front pages as catalysts of consumption habits for digital readers. Currently, less than half of visits (44.6%) received by 28 newspapers analysed directly access the media website at its main URL (home).

Search engines, on the contrary, have become increasingly important as a gateway to informative products. In the case of top European newspapers, 19.6% of visitors access the media website through a search engine but, obviously, some of the top search terms are still the name of the newspaper itself.

However, significant links between search engines and the flow of visitors to the newspapers also emerge. The search of «latest news» on Google Spain redirects to, in order, websites for «El País», «Europa Press», «20 Minutos» and «El Mundo». In the case of «The Sun», meanwhile, almost 10% of its hits from search engines come from the name of his iconic «Page 3». This source of visitors ranges from information sites to service web pages, which provide examples like the first result for «horoscope» in Google Spain redirects to the newspaper «ABC».

Positioning techniques, that is, the set of procedures that help to place a website or a web page in an optimal location between the results provided by a search engine, thus acquire a great importance in the media web page management (Alonso, Garcia, & Zazo, 2008). The ability to generate content that occupies privileged places in search results –for example, in the Google PageRank index– means considering not only traditional news and design criteria in development of information and services, but also the main basics of cybermetrics, such as the authority of the domain in which the site is located, thematic relevance of the pages from that link to it, the text and the link position, etc.
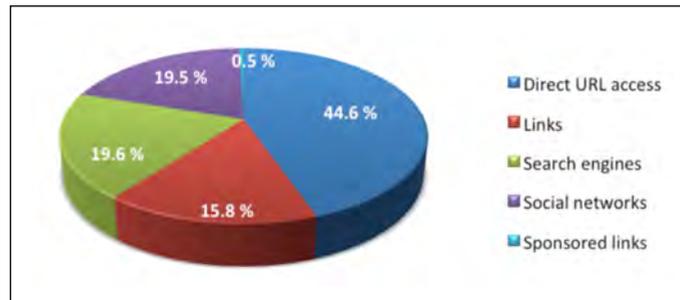
Figure 4. Sources of access to European newspaper websites.

Thus, writing for digital media has incorporated the concern for the development of metadata, keywords and terms included in the title as the basis for better visibility of content published by newspapers. As the development of the news on paper does not stop with its writing, but in its integration into the newspaper design, the information on the website also incorporates the task of maximizing its ability to generate traffic, because unlike printed products, which are consumed as a whole, web pages can be consumed individually and in an unconnected way.

The high volume of textual information stored by printed newspapers, their frequent updating, the thematic coherence of their content and the high number of visits that they are capable of generating help ensure that the authority of their websites is high and that their texts frequently appear among first search results. However, this trend also supposes a change in the deep structure of the conception of media in terms of access to information. They go from being homogeneous sets of content consumed in their entirety in agglomerations of information that are geared towards readers' individual interests. In the information product's conception for digital media, the news or services are gradually replacing printed newspaper as consumption unit.

Social networks –particularly Facebook and Twitter– have also become important sources of access to information in newspapers and, in the case of the top European newspapers, a source of 19.5% of visits. Their growing influence explains the increase in the media's interest to create virtual communities around their news outlets, and also affects strengthening the news unit as the core of data consumption in digital formats. Their use as tools for promoting content, mainly in the case of Facebook, and with a more conversational profile in the case of Twitter, is highly valued by the media (Noguera, 2010; García-de-Torres & al., 2011).

Finally, European newspapers obtain 15.8% of

visits through links on other websites –for example, from other media that belong to the same publishing company– and only 0.5% from the sponsored links in search engines.

4. Discussion and conclusions

The analysis of adaptation to screen interface and new digital formats of the top newspapers from 28 European countries leads to the following conclusions:

1) In general, two out of three newspapers have managed to shift their leadership in printed media to the Internet, mostly aided by textual weight of the consumption of information on the Internet. This success, however, is limited in the case of media that have opted for rigid paywalls or with a regional or local broadcast area.

2) The consumption of media in the digital formats is diluting the traditional correspondence between the political and administrative boundaries and areas of media dissemination for creating global audiences. The result is the emerging new global media from preexisting national media, which have excellent examples in the British news outlets «Daily Mail» and «The Guardian».

3) The widespread use of mobile devices (smartphones and tablets) favours an alternative distribution of information that, far from being a complement to traditional editions, is in many cases the main source of influx of readership for media. The result of this trend is that European newspapers have a firm commitment to the creation of products on multiple platforms.

4) The incorporation of a new screen and interface for consumption of information has also led to a transformation in product structure and design, where sporadic and superficial reading of information favours the existence of highly saturated front pages. With a «bounce rate» of 50.21% and an average of 3.57 pages viewed per visit, websites have increased their reach significantly.

5) Digital formats have opened new windows of information access, which alter the way the media dis-
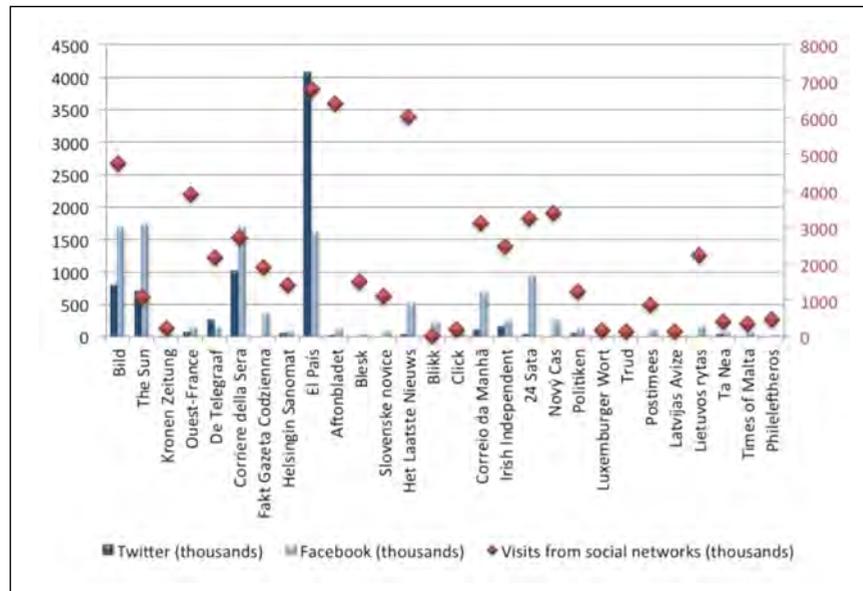
Figure 5. European newspapers on social networks.

tribute their content and less than half of visits (44.6%) access the websites of the online Europeans newspapers directly through their URL. The growing importance of search engines (19.6%) promotes the incorporation of positioning techniques to the process of information development, which have replaced the product as a consumption unit online. Furthermore, social networks (19.5 %) are an important source of visitors for European newspapers' digital formats, which have incorporated them as a source for redistribution of content.

Notes

[1] Data from the National Readership Survey are obtained through a very large sample of telephone surveys. Data from the 2014 edition are based on 35,570 telephone interviews conducted between December 19, 2013 and December 1, 2014.

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