Online media, population and economics: facing the relationship between media brands and social indicators in Spain

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ABSTRACT

Determine the ecology of a media system allows to understand the relations between that system and their social and economical structure which is under of it. The Infotrends database, developed by four Spanish research groups, stores records on online media focusing in geographical and editorial features of the brand. Our study provided a comprehensive map of online media in Spain in 2004, with some important key findings: 1274 online media are disseminated through the 19 different autonomous communities in Spain, and more than a 40% of them are specialized in particular areas of human knowledge. The Spanish online media brands are inserted in global operations, in coexistence with the traditional and original brands –the 80% were born from press, radio or TV- and run with an synchronized publishing cycle with them. We explored the relation among brands, economics and population, stopping specially in the Information Society indicators, and we found the same imbrications with the traditional ratios of medium per inhabitant. Internet publishing diversity still depends on rates of population, general wealth and proximity to

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centers of power and decision, and not so many on particular interests or local linguistic or cultural diversity.

1. INTRODUCTION

In spite of the efforts of the last 20 years, the Communication Sciences still remain as one of the youngest areas of knowledge inside the Social Sciences. Usually, most of the methodology and theoretical frameworks of research in SC research is taken from previous experiences in other knowledge areas. The results are, essentially, diverse and plurisciplinar. With the online media, the communication research faces new contexts, new problems, and the clear emergence of a new factor to consider, the technology.

The digital communication makes interaction between people and machines closer; machines go forward in a 'humanized' way; the information appears as the key value of interchange in modern societies (Castells, M.: 1997) in some theoretical proposals coming from Sociology. The dynamics of Information Society were explored intensively in many research projects. The evolution of social uses of technology, network access and, in general, processes of penetration of the wires inside communities have been focused as 0one of the keys of our times.

Some authors discussed around the concept of 'online media' itself and the processes of formatting, editing and producing in the online newspapers (Noci, J.; Salaverría, R. *et al*: 2003). In general, issues on information layouting on online media have advanced strongly in this first

decade of online media. Well known are the efforts to developing taxonomies for research (Paul, N.; Fliebich, C.: 2002) and to identify basic structures on the media (Kenney, K; Gorelik, A.; Mvangi, S.:1999, *as an example*). From the industry side, entities like the World Association of Newspapers have studied in its annual reports the media landscape and profit revenues.

Therefore, the advances on social research and communication rhetoric and visual representations allowed finding some validated tools to explore landscape and know more on online media ecology. Ten years after the great *bang* of the Internet, digital newspapers drive big amounts of audience and compete with new kinds of content which are not produced strictly by journalists. How is the ecosystem of online media and which are their profile? Can we find a process of specializing content and knowledge areas in the editorial strategy, as the Internet users move to more segmented and particular interests? In these paper, we try to understand the relations between online brands and public, the link between real population and real territories and virtual media. The scientific literature have emphasized, from a technologic point of view, the virtual properties of the medium –no time, no territories. Now it is time to determine how real world influence real online media using traditional indicators of human development.

Spain, a complex European Union State with 40 million people, different stages of wealth and a rich cultural and linguistic diversity appeared as an interesting workplace to interact social and journalistic variables.

2. METHODOLOGY

There is a relatively long tradition of research on online media in the Spanish Universities. The Departments of Communications were incorporating online media courses and research projects on digital since 1996. Several research groups explored issues and features of online journalism, relating to news producing and writing, and also web layout and formats, specially at the end of the 90's decade. In the next decade, most of groups from different Universities converged in generating global materials to understand the global phenomena of digital communication. Efforts went in two directions: understand the global impact of the Internet in the mass communication media in the whole territory of the European Union[1] and, inside Spain, to obtain a comprehensive, exhaustive map of online media in the country.

Producing the concepts

A basic map of the online media in Spain is the purpose of the Infotrends project, in which the universities of the Basque Country, Pamplona, Santiago de Compostela and Malaga are involved[2]. We produced a methodology which rely on a common online data base which intends to be a tool enabling a real time control over catalogue. Spain is structured in 19 Autonomous Communities, self-governed territories with an own Parliament, Government and traditional coexistence in the media ecosystem of local media and national ones. Every research group get

[1] The COST A-20 project, supported by the European Union, involves 30 research teams from different EU countries which developed a common methodology for content analysis in tradicional and digital media.

[2] The project is supported by the Ministry of Science and Technology of the Spanish Government (reference number: BSO2002-04206-004-02).

responsibility over several of them, controlling the changes in the local media landscape.

The record of every online media basic information was planned in order to retrieve general formulations on territory, independence of the online version in comparison with traditional media and issues on multimedia producing, updating or thematic areas. The database record structured the first part of cataloguing on information on geographical location of headquarters of the brand. Second part involved to content, updating and origins of the online media and its relations with traditional delivering channels.

Several concepts were explored to mark the limits of what could be catalogued. and what not. Specially important was to find a suitable definition of 'online media'. In our proposal, an online media is a "content source with will to mediate between the events and the public, mainly through journalistic criteria ad techniques, using multimedia language, and updated and published in the internet". As it can be observed, it is a *social* and format definition of online media, in spite of law or economical approaches to question. The motivation was to observe the behavior of possible new formats of journalism which come from innovative sources and editors.

The second concept which we developed aimed to establish a research difference between 'dynamic', 'static' or 'online' media. In the previous sightseeing over the research objects, we perceived the use of the Internet by some editors of traditional press, radio or TV products strictly as a promotion channel which they delivered a 'facsimile' edition of the content. We develop terminology to apply a research differentiation among 'dynamic media' –an evolution of a press, TV or radio brand which new

content or a new elaboration of it suited to online features, like hypertext, multimedia, interactivity of updating cycle-, ‘static media’ –strictly those brands with the only presence on the Internet of some kind of facsimilar delivering, such as PDF or audio and video streaming. The last one is the “New cybermedia”, intended to those brands which were generated exclusively for the Internet delivering. The purpose of this conceptual differentiation was to determine the degree of elaboration of the internet channel.

The third concept allow to make the distinction between generalist and specialized media. We were interested in know how online brands answered to the fragmentation of the interests of the public. Process of specialization, of course, is not new and runs with journalism from its beginnings. Nevertheless, fragmentation of discourse in the media grow up with the evolution of Postindustrial Society (Esteve F.; Fernández, J.: 1993), generating specific model. The specialization in the media was defined like “that informative structure which deeps and analyze the reality of a specific area of actuality through the different specialties of knowledge, go inside their motivations, puts it into a wider context and produce a journalistic message which adapts the code to the proper level of the audience” (Esteve F.; Fernández, J.: 1993). So, media could be catalogued as “generalists” or “specialized”. In order to simplify the taxonomy, we did not focus in the research on the role of local media, involving them into the ‘generalists’ classification.

Database was created along the whole 2002, controlled in the 2003 and reviewed and validated in the 2004.

Establishing comparisons

The retrieving and analysis from Infotrends database could be used by crossing the internal data themselves in order to obtain a self-analysis of the sector and the specific profile of online media in Spain. But we decided to expand the research in order to try comparisons with other indicators of Information Society Development.

Can be compared national development and online media demography? Particularly, has the development of the Information Society (IS) implications in the media landscape? Could be exist some method to establishing comparisons and to export it to different geographic contexts? In last term, are the media indicators of IS development?

Diversity of variables makes difficult nowadays to establish a global comparison among different countries in different continents. As some authors discussed, there is not a unique model of Information Society development in the world (Font, A.: 2003) and relation must be reviewed in order to the stage of penetration of the wired society and technology in every place. From this point of view, common efforts were made in the European Union to homologate the degrees of social development, distinguishing between employment, innovation and research, economic reform, social cohesion, environment and general economic background. We used some traditional social and economic variables used in the European Union Structural Indicators[3] reports for the European Comission to look correspondence with the data that we obtained from Infotrends database. Population, GPD, GPD per capita in the social general factors and, involving to IS variables, general Internet access level and Internet access level in the households.

[3] The Europe Structural Indicators are elaborated by the EuroStat monitor: a department of European Union which homologates and adapt the work of the different National Statistics Institutions. URL: http://epp.eurostat.cec.eu.int/

We confronted several main questions to the Infotrends database in order to establish correlations among online brands evolution, wealth and information society development.

- More population generates more media?
- More wealth generates more media?
- More wealth per capita generates more specialized media?
- More wired population generates more media?

DISCUSSION

The ecosystem

1274 online media have their headquarters in Spain. Most of them (79%) share their brands with original traditional versions in press, radio or TV. But their format in the Net is inspired mainly in the model closer to the press and typical online formats of publishing (54%). Exclusive Radio (27.63%) and TV (8.71%) formats had less importance.

The specialization

The online media in Spain had a huge degree of specialization: a 40.27 % of them are focused in a specific area of knowledge:

ONLINE MEDIA BY THEMATIC OF SPECIALIZATION		
Themes	**Number of media**	**Percentage of the whole**
Science, Wealth, Technology	35	6,82%
Culture (Arts)	120	23,39%
Sports	40	7,80%
Economy	49	9,55%
Education and Childhood	19	3,70%
New Technologies	25	4,87%
Laws	4	0,78%
Communication and mass media	45	8,77%
New social trends	18	3,51%

Entertainment and Tourism	51	9,94%
Others	10	1,95%
Politics	10	1,95%
Religión	10	1,95%
Services	43	8,38%
People, Society	34	6,63%
TOTAL	513	100%

Fig. 1. Ranges of specialization in the Spanish online media. ***Source: Infotrends Database***

There is an interesting gap in the ecosystem if we confront these results with the tradition in the Spanish media system. Politics, Economy, Culture and Society were the usual four branches for specialized media in Spain (Esteve, F., Fernández, J.: 1999) but the study of what happens in the Internet reveal that things changed: Culture and Arts has the plentiful numbers: a 23.39%; specially interesting is the new dimension of Entertainment, Leisure & Tourism (9.94%), a kind of content which has not many space in traditional media. We can observe the traditional weight of the economic information (9.55%) and other interesting gap: we can find a notorious number of net publications on the own media and the own profession. Specialized information on media obtain an surprisingly 8.77%.

Publish cycle

Only a 14.84% of online media update constantly (more than one time a day) their online media. 22.76% of them updates daily and more than a half use other updating criteria. At this point, as a work hypothesis, we can remark that online media could have a monthly updating criteria, more or less synchronized with the printed editions of the original publications. A weekly publish cycle is used in the 9.11% of the cases.

Confronting data with social variables

1. Territorial differences

There are huge difference among different territories. Madrid, the capital of the State, holds more than the 37% of the online media. There are a big concentration of online media in five administrative territories. If we count the whole of Madrid, Basque Country (Euskadi), Andalucía, Comunitat Valencia and Cataluña, we discover that this five communities hold the 72% of the whole online media.

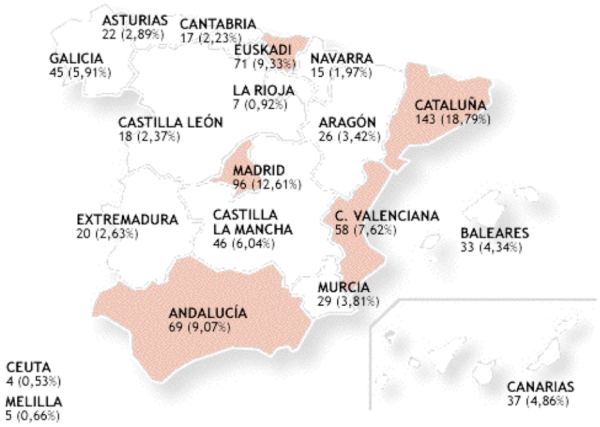
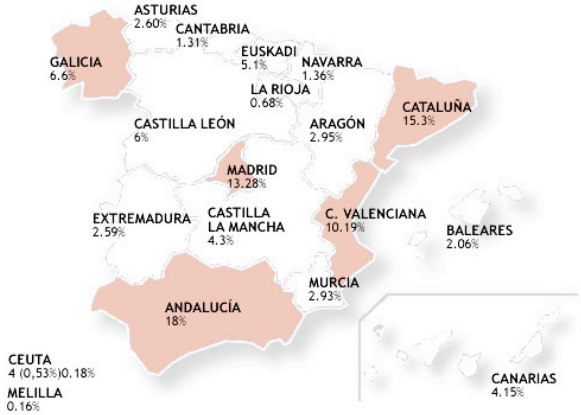


Fig.2.Volume of online media in Spain. The red remarks the 5 territories with more online media. *Source: Infotrends*



There is a correspondence between population and presence of online media. Let's observe the map with the 5 territories more populated:

Fig.3. Percentage of population by Autonomous Communities in Spain. ***Source: Instituto Nacional de Estadística***

There is a strong relation between number of online media and percentage of population. Only the case of Galicia seems different. This Autonomy of the North West of Spain holds only the 5.91% of the Spanish media.

2. Wealth differences and number of media

Let's compare the Gross Domestic Product (GDP) of each Autonomous Communities with the number of online media:

Autonomous Communities	Number of online media	GPD (2003)
TOTAL	**1274**	**568.311.000**
Cataluña	206	103.709.507
Madrid	279	98.919.752
Andalucía	125	78.714.612
C. Valenciana	84	55.227.377
País Vasco	116	36.235.858
Castilla y León	19	32.442.080
Galicia	69	30.542.808
Canarias	58	22.247.887
Castilla - La Mancha	55	19.912.278
Aragón	29	17.756.624
Murcia	45	13.952.133
Baleares	49	12.597.327

Asturias	29	12.558.264
Extremadura	29	10.023.704
Navarra	37	9.894.342
Cantabria	26	7.100.510
Rioja (La)	9	4.253.614
Ceuta	4	865.162
Melilla	6	778.439

Fig. 4. Comparison between GPD (in thousand of euros) and number of online media (ordered by GDP). ***Sources: Infotrends, Instituto Nacional de Estadística***

As we can see, there is a regular correspondence between number of online media and Gross Domestic Product. Specially remarkable is the important difference between Madrid and Cataluña, where Madrid holds the most of online media with a similar GDP to the Cataluña, or the role of the Basque Country, which has a big amount of online media with a moderate GDP. Possibly, we have to pay attention to the level of individual wealth, as it is expressed in the GDP per capita:

Autonomous Community	Number of online media	GPD (2003)	GDP per capita
País Vasco	116	36.235.858	17130,53
Madrid	279	98.919.752	17040,94
Navarra	37	9.894.342	16921,10
Cataluña	206	103.709.507	15221,58
Rioja (La)	9	4.253.614	14490,11
Aragón	29	17.756.624	14210,03
Baleares	49	12.597.327	13190,30
Castilla y León	19	32.442.080	13008,48
Cantabria	26	7.100.510	12798,69
C. Valenciana	84	55.227.377	12155,77
Asturias	29	12.558.264	11695,59
Canarias	58	22.247.887	11614,42
Ceuta	4	865.162	11588,96
Melilla	6	778.439	11444,94
Galicia	69	30.542.808	11102,50

Murcia	45	13.952.133	10776,39
Castilla - La Mancha	55	19.912.278	10769,91
Andalucía	125	78.714.612	10239,28
Extremadura	29	10.023.704	9321,90
TOTAL	1274	568.311.000	13156,05

Fig. 5. Comparison between GPD per capita (in euros) and number of online media (ordered by GDP per capita). ***Sources: Infotrends, Instituto Nacional de Estadística***

Nevertheless, we do not find any particular correspondence between individual richness and number of online media. But is remarkably the interesting relation between the top level of the Basque Country and the number of online media, still with a plausible explanation.

3. IS variables differences

As we explain before, we use basically two variables to determine in this project the relation between a wired society and the diversity of information sources in the Web. These variables are the general Internet access level and Internet access level in the households.

Autonomous Community	Number of online media	% penetration of Internet	% households with Internet access
Madrid	279	40,30%	39,40%
País Vasco	116	39,40%	39,40%
Cataluña	206	36,50%	40,40%
Baleares	49	36,30%	36,30%
Cantabria	26	35,30%	30,20%
Navarra	37	34,40%	35,90%
Aragón	29	33,90%	31,90%
Canarias	58	30,50%	30,90%
Andalucía	125	30,40%	24,20%
Asturias	29	30,10%	26,60%
Murcia	45	29,90%	27,00%

C. Valenciana	84	28,90%	28,60%
Galicia	69	27,20%	19,10%
Rioja (La)	9	26,80%	26,40%
Castilla y León	19	26,00%	25,00%
Extremadura	29	26,00%	19,90%
Castilla - La Mancha	55	23,80%	20,60%
Ceuta	4	-	27,70%
Melilla	6	-	28,50%
TOTAL	1274	32,90%	30,90%

Fig. 6. Comparison between number of online media, penetration of Internet and households with Internet access (ordered by penetration of Internet). ***Sources: Infotrends, Instituto Nacional de Estadística***

There is an interesting correspondence between penetration of Internet and number of online media, but this is not the main factor of growing of diversity in online media. Nevertheless, Internet has been defined as a space with no geographic limitations. Is there any relation between the traditional heritage of online media –the 80% of online media have original traditional brands and coexist with them- and territoriality parameters? Are the online media continuing with the inertia of traditional media, placed in the political and economical focus of decission?

Let's take a global view over the data and introduce two new variables: the exclusively online media with no traditional version and the percentage of exclusive digital newspapers over the whole.

Comunidad Autónoma	Número de Habitantes	Número de cibermedios GLOBAL	ONLINE	% penetración de Internet	% viviendas con acceso a Internet	PIB (año 2003)	Renta per cápita	% ONLY ONLINE MEDIA
Andalucía	7.687.518	125	20	30,40%	24,20%	78.714.612	10239,28	16
Cataluña	6.813.319	206	26	36,50%	40,40%	103.709.507	15221,58	12,62
Madrid	5.804.829	279	56	40,30%	39,40%	98.919.752	17040,94	20,07
C. Valenciana	4.543.304	84	17	28,90%	28,60%	55.227.377	12155,77	20,24

Galicia	2.750.985	69	36	27,20%	19,10%	30.542.808	11102,50	52,17
Castilla y León	2.493.918	19	4	26,00%	25,00%	32.442.080	13008,48	21,05
País Vasco	2.115.279	116	25	39,40%	39,40%	36.235.858	17130,53	21,55
Canarias	1.915.540	58	25	30,50%	30,90%	22.247.887	11614,42	43,10
Castilla - La Mancha	1.848.881	55	17	23,80%	20,60%	19.912.278	10769,91	30,91
Murcia	1.294.694	45	5	29,90%	27,00%	13.952.133	10776,39	11,11
Aragón	1.249.584	29	14	33,90%	31,90%	17.756.624	14210,03	48,28
Extremadura	1.075.286	29	3	26,00%	19,90%	10.023.704	9321,90	10,34
Asturias	1.073.761	29	4	30,10%	26,60%	12.558.264	11695,59	13,79
Baleares	955.045	49	5	36,30%	36,30%	12.597.327	13190,30	10,20
Navarra	584.734	37	5	34,40%	35,90%	9.894.342	16921,10	13,51
Cantabria	554.784	26	4	35,30%	30,20%	7.100.510	12798,69	15,38
Rioja (La)	293.553	9	1	26,80%	26,40%	4.253.614	14490,11	11,11
Ceuta	74.654	4		-	27,70%	865.162	11588,96	0,00
Melilla	68.016	6	1	-	28,50%	778.439	11444,94	16,67
TOTAL	43.197.684	1274	268	32,90%	30,90%	568.311.000	13156,05	

Fig. 7. Comparison between all the variables, introducing the number of the exclusively online media and its percentage over the whole count of digital newspapers (both in yellow) (ordered by population). ***Sources: Infotrends, Instituto Nacional de Estadística, AIMC***

As we can appreciate, there is not a clear relation among the variables of exclusively online media and population or wealth ones. We can perceive only a deeper relation. The territories with a stronger presence of the online media with respect to the whole of digital products are those who had some kind of peripheral relation in relation to the political and economic centre of the State, Madrid. Specially interesting, though this is still an hypothesis, is the relation between different languages than Spanish (Galicia, Cataluña, Basque Country, Comunidad Valenciana) and the grow of exclusively only online media.

CONCLUSSIONS

- The online media ecosystem in Spain is strictly related with the traditional media. Most of digital papers has an original version in the press, TV and radio. But when traditional media create a presence for the web, they use a classic digital publication schema, and not use intensively other facsimilar options (only streaming, or PDF).
- Leisure, Entertainment and Culture represent the most of the efforts of publication to reach the segmented audiences.
- There is a closer relation between population, territory, GDP and number of online media. At this time, diversity of Spanish media does not depend on individual richness or Information Society variables, like Internet access. The proximity to important centers of decision, power and economics, like Madrid, are determinant. But the numbers of population also.
- In a inertia from the past, the same situation happens for exclusively online media, created in the last 10 years. There is not a crash of the traditional communication ecosystems through a wired society, with few local connections.

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