

5 Wales in Print

5.1 Introduction

Consumption of newspapers in the UK has, traditionally, been high by international standards, and newspapers remain important in the UK as a source of information and a setter of news agendas. However, print media are in a state of flux, not only in Wales but throughout the UK and much of the industrialised world. In many cases the circulations of print media in Wales and the UK have been declining for some time, reflecting changes in news consumption not caused solely by technological developments.

But decline is not universal. English and Welsh language local newspapers have generally performed much better than newspapers with a wider geographical focus. This, perhaps, shows that there remains a healthy market for local media that are non-immediate (local titles tend to be published weekly or monthly) and contain traditional reportage with little direct and immediate interaction between the newspaper and reader.

The internet is commonly assumed to be the printed word's successor because it offers a combination of immediacy and potential for personalisation and interaction unmatched by traditional media. Use of the internet is growing at a considerable rate – but from a small baseline – although internet use in Wales appears to be lower than much of the rest of the UK.

Major print media providers are commercial entities. In the face of tough market conditions print media providers have coped by adopting a mixture of strategies:

- Cover price reduction promotions, changing page formats and adding supplements
- Diversifying away from pure news and comment to cover a wider range of interests
- Publishing new free daily or weekly titles
- Making savings through reducing staff levels and 'multi-skilling' journalists to publish and broadcast news material across different media
- Cultivating an online presence, with more types of media and opportunities for greater user interaction and choice (and increasing the size of sections of the newspaper devoted to correspondence, discussion and interaction).

For commercial reasons newspaper providers have begun to tackle the widespread threat of reducing circulations, which presents challenges to revenue and business viability. By modifying media delivery away from traditional newspaper provision newspapers have been able to offer news in a more flexible and market-driven format.

Reduced readership results in a smaller base for advertising – the lifeblood of commercial media providers. The Newspaper Society's Regional Press Survey 2006 found that 73 per cent of revenue in UK regional operations came from advertising and sponsorship while circulation sales accounted for 15 per cent. Advertising is not likely to diminish in importance for the time being. Print media providers find in the internet a potential new delivery mechanism for their media and thus sources of revenue, albeit in a different form.

The print media market in Wales provides challenges of its own. Just as the topography of Wales has made terrestrial broadcasting difficult, it has also made Wales-wide distribution time-consuming and costly. The uneven distribution of the population combined with the limitations of the road network has created a fragmented Welsh market. Even taken as a whole Wales remains a relatively small market, while its demographic profile and relative poverty mean that for all media advertisers the economic value derived from advertising in Wales is lower than the UK average:

Figure 1: Wales and UK – key demographic differences

	Wales	UK average
People in ABC1 categories	c.49%	c.55%
People in C2DE categories ⁴	51%	45%
Rural population	22%	12%
Average weekly household income (gross)	547	642
Average weekly expenditure	405	456

Sources: Office for National Statistics, Family Spending (2007 ed.); quoted in Ofcom, Communications Market Report, Wales (2008)

The Welsh media market has the challenge of dealing with two languages. As with any minority language Welsh relies on the continued written (and spoken) word for its survival. The various magazines, periodicals and *papurau bro* printed in Welsh have a role in the life of the language as well as their wider social role as information sources. Possible Assembly Government financial support for a Welsh language news supplier – whether print or online – has created a new opportunity, although also opening up a new area of debate about public and state support in the media market.

4) Social research categories used to denote employment status: C2 is 'skilled working class', D is 'unskilled worker' and E is 'lowest levels of subsistence'

Given the increasing emphasis on online provision, it is worth remembering that survey data suggests that internet use in Wales is lower than most of the other regions of the UK:

Figure 2: People using the internet at home or elsewhere within the past 12 months – %

ITV region (2007)	Percentage
Greater London	79.4
South East/East Anglia	75.8
South West	72.4
North west	71.3
East and West Midlands	69.1
Scotland	68.5
Wales	68.0
North	66.5
Yorkshire & Humberside	63.5

Source: GB TGI, BMRB 2007/Mintel

Wales's arguably weaker economic position relative to the UK and its use of the internet are probably related. Low internet usage is closely matched by similarly low consumption of regional and local newspapers. In 1999, when the Welsh Assembly began, Wales had one of the lowest proportions in the UK of regular regional or local newspaper readership:

Figure 3: % regularly reading regional or local newspaper by region (1999)

Region	%
Scotland	95.6
West Midlands	88.9
East Anglia	87.3
North West	86.9
North	86.3
South east	85.3
East Midlands	85.0
South West	84.1
Yorks. and Humberside	82.9
Wales	80.0
Greater London	76.3

Source: Audit Bureau of Circulation (ABC), 1999

More recent data from the Incorporated Society of British Advertisers in Figure 4 suggest that this remains the case.

There are differences in the use of print media relative to other media in Wales. Figure 5 shows survey data about use of media sources for news.

The most significant divergences in news media consumption between Wales (and the south west) and the UK are: greater use of broadcast media as

a news source – especially radio; and lower use of websites (from both television and newspaper providers) and free dailies. Although Figure 5 might appear to contradict the ABC and ISBA data in Figure 3 and Figure 4, Figure 5 includes UK-wide newspapers as well as local and regional titles. Further data about the consumption of UK newspapers are considered later in this chapter.

Figure 4: % reading any regional newspaper (ISBA regions 2006-7):

ISBA region	%
Border	94.9
Central Scotland	89.4
South West	87.9
North West	87.7
Northeast Scotland	87.1
East	86.8
Midlands	85.2
South	84.4
London	81.4
North East	81.0
Yorkshire	79.9
Wales and the West	76.9

Source: GB TGI Survey 2006 Q3 (April 2006 – March 2007)

Note: Wales figure includes the south-west of England.

Figure 5: From where do people source their news? % of population

News source	UK	South West and Wales
24 hour or other TV news	71	74
Radio	48	54
Paid-for daily newspaper	33	41
Website of TV news provider	17	11
Word of mouth / friends / relatives	14	16
Free daily newspaper	10	4
Newspaper website	8	5
Internet portal/information site	5	4
Online news feed/ticker	2	3
Internet radio feed	2	3
Online blog sites	1	2

Source: BMRB/Mintel, November 2007

Note: Wales figure includes the south-west of England.

Evidence in Figure 6 of the use made of media coverage of the 2003 Welsh Assembly elections shows a similar distribution of media consumption.

The various data above suggest that, while consumption rates of newspapers and online media are lower in Wales than the UK average, overall reliance on traditional media (paid-for newspapers,

radio and television) is greater than the UK average. The nature, content and source of those newspapers, therefore, become crucial. In that context Welsh citizens should be concerned to hear a Welsh academic say in 2008: "It is nigh-on universally accepted that newspaper coverage of Welsh affairs is pretty abject."⁵

Figure 6: "During the election campaign have you..."

	%
...read election coverage in newspapers?	47
...seen any election coverage on TV?	65
...heard any election coverage on radio?	29
...used the internet to access election information?	5
...discussed the election with friends or family?	49

Source: NOP 2-9 May 2003 (1153 people surveyed) quoted in J. Thomas, *The Regional and Local Media in Wales*, submission to National Assembly for Wales, Culture, Welsh Language and Sport Committee, January 16, 2006

Proprietors and managers of private sector media will resist the application of a public service milieu around their products. Nevertheless, the continuing importance of their products to the size and quality – good or poor – of the information base of Welsh citizens suggests that they must be taken into account as issues in their own right and as an important context for the consideration of public service broadcasting. If the over-riding imperative is the health of Welsh society, politics and democracy, then the challenges for Wales revolve around ensuring plurality and equitable representation of Welsh issues in Welsh and English language media based in Wales.

More specifically they are:

- Safeguarding the health of a plural spread of local and national media based in Wales, in print and on the internet, to ensure they serve public needs and are economically sustainable
- Facilitating greater interaction, debate and reflection in Wales between civil society and political processes
- Underpinning investment in indigenous journalism, and raising standards.
- Persuading London based newspapers to lessen their overwhelming concentration on their core market in the south east of England.
- Realising the potential of the internet to reach wider audiences, increase interaction and boost access to information
- Representing equitably the ethnic, political, geographic and economic diversity of Wales
- Ensuring the vibrancy and continued health of the Welsh language even as the market tends towards cultural homogenisation.

5.2 Regionalised newspaper markets

The Welsh newspaper market has more in common with English regional newspaper markets than with market patterns in Scotland or Ireland for geographical reasons. Daily newspaper circulation in Wales is dominated by London-based newspapers, and their distribution into Wales is determined more by logistical considerations than by regard for Wales as a social or market entity. Even in the case of indigenously produced newspapers there is, arguably, no Welsh national market, but rather regional 'spheres of influence' dominated by newspapers groups or their regional divisions in largely settled geographic niches:

- North: North Wales Newspapers and Trinity Mirror (North Wales)
- Mid Wales: a mixture of Trinity Mirror (North Wales and Media Wales) and Tindle News Ltd
- South-west: South West Wales Publications Ltd and some overlapping areas with Trinity Mirror (Media Wales) and Newsquest
- South-east: mainly Trinity Mirror (Media Wales) and Newsquest (Wales and Western).

Trinity Mirror is the dominant presence in the Welsh print market, featuring as Media Wales in the southern half of the country and as Trinity Mirror North Wales elsewhere. The company is the top regional newspaper publisher in the UK (by circulation) and Wales' *de facto* national print media provider, responsible for the only 'national' morning newspaper – the *Western Mail* – and the *Daily Post* in north and mid Wales and its only indigenous Sunday newspaper, *Wales on Sunday*. It owns 24 other Welsh titles and commands more than 40% of the combined circulation of all indigenous titles.

The management of the company's operations in Wales is divided between the north and south. The *Daily Post* is managed overall as part of Trinity Mirror's North West England division, while all its southern titles have been managed from Cardiff by the *Western Mail* and *Echo Ltd.* that, in 2007, re-branded itself as Media Wales.

This decision, involving the integrated management of all its journalistic staff across all titles and across online, is an indication of the priority that online development will have in the company's future strategy – an attempt to ensure its brand presence on the internet and underline its intended, and to a great extent actual position as an all-Wales media provider in online and in print. However, the importance of other newspaper groups in regions of Wales should not be understated.

5) Richard Wyn Jones, 'Information gap', *Agenda*, Spring 2008

Since websites can be accessed with ease from any location with an internet connection, one might think that the concept of geographic markets is challenged somewhat by the provision of news online. However, the internet can reinforce as well as extend the local. Theoretical capacities and the capabilities of online will be restricted by economics, that is by business models. For this reason, if for no other, it would be premature to conclude that traditional printed newspapers will disappear completely.

5.3 Circulation of newspapers in Wales

In terms of daily newspaper sales the dominance of London-based newspapers is evident in the data delivered by the Newspaper Readership Survey and JICREG (the Joint Industry Committee for Regional Press Research) and by research carried out by GfK NOP Media for Trinity Mirror. Unfortunately, London newspapers do not publish their circulation figures for Wales; therefore the only measure of comparison is readership.

Data in Figure 8 are drawn from research carried out in 2005. It can be seen from Figure 7 that the two morning titles in Wales – the *Western Mail* and the *Daily Post* – have a combined daily sale of 74,008 and readership of 266,000 in Wales – i.e. 3.6 readers per copy. They account for 13.1% of the daily morning readership (Figure 8). The combined readership of the London-based newspapers in Wales is put at 1,760,000 – i.e. a figure 6.6 times

greater than for the two Welsh papers. Two years later, the NRS survey put the combined readership of the two Welsh papers at 243,737, 8.4% lower than in 2005.

Figure 8: Daily morning titles in Wales ranked by readership

Rank	Title	Wales readership	%
1	The Sun	488,000	24.1
2	Daily Mirror	360,000	17.7
3	Daily Mail	325,000	16.0
4	Daily Express	160,000	7.9
5	Western Mail	140,000	6.9
6	Daily Star	137,000	6.8
7	Daily Post	126,000	6.2
8	Daily Telegraph	103,000	5.1
9	The Times	67,000	3.3
10	The Guardian	65,000	3.2
11	The Independent	47,000	2.3
12	Financial Times	8,000	0.4
	Total	2,026,000	100

Source: GfK NOP Media 2005

The inescapable, and rather alarming conclusion is that more than 85% of the Welsh population read only London-based newspapers that contain minimal or no coverage of news of Wales. The contrast with Scotland is marked (in Figure 9).

The traditional market split between 'heavies', middle market and 'redtops' contains few surprises, with the redtops dominating, though with just under half the Welsh readership. Redtops in

Figure 7: Daily newspaper readership in Wales

Daily Newspaper Title	UK circulation*	Total UK Readership **	Total Wales Readership ***
Western Mail [AM]	37,576*	129,389**	140,000***
Daily Post (Wales) [AM]	36,432*	114,348**	126,000***
South Wales Echo [PM]	46,127*	149,516**	172,000***
South Wales Argus [PM]	28,457*	72,495**	90,000***
South Wales Evening Post [PM]	51,329*	149,936**	122,000***
Wrexham (& Chester) Evening Leader [PM]	21,180*	74,095**	48,000***
The Sun	2,937,931	7,980,000	488,000
Daily Mirror	1,393,844	3,789,000	360,000
Daily Mail	2,141,596	5,230,000	325,000
The Guardian	310,702	1,121,000	65,000
The Independent	197,718	745,000	47,000
Financial Times	134,045	360,000	8,000
Daily Express	699,312	1,678,000	160,000
Daily Star	612,642	1,597,000	137,000
Daily Telegraph	819,729	2,075,000	103,000
The Times	584,185	1,666,000	67,000

Sources: * UK Circulation (excluding Rep. of Ireland): ABC; ** Total UK Readership: NRS and JICREG; *** Total Wales Readership: GfK NOP Media 2005. Total Wales Area.

Scotland, which include the Scotland’s own *Daily Record*, account for 60% of the total Scottish readership. The London ‘heavies’ account for only 5.5% of total Scottish readership, compared with Wales’s 14.3%, but if Scotland’s two indigenous papers – The Scotsman and The Herald are classed as heavies, the Scottish figure rises to 18.3%.

Figure 9: Daily morning readership patterns – Wales and Scotland

	Wales	Scotland
Circulation of indigenous papers	74,008	639,517
Readership of indigenous papers	266,000	1,956,631
Readership of indigenous papers as % of total	13.1	52
Readership of UK-wide papers	1,760,000	2,661,289
Readership of UK-wide papers with Wales/Scottish editions	None*	2,551,289
Readership of UK-wide papers with no Wales/Scottish editions	1,760,000	100,000
Total readership	2,026,000	3,757,631
Total readership as % of population	67	74

Source: NRS Jan-Dec 2007

*No UK-wide papers with Wales edition

Surprisingly, the figures show that, of the five traditional up market papers, only the *Financial Times* sells more in Scotland than in Wales, despite

the heavy investment in Scottish editions. The combined readership of these five newspapers in each country represents 9.6% of the Welsh population, but only 4% of the Scottish population. This may play its part in explaining relative levels of political engagement with Welsh and Scottish institutions by the professional class in each country.

Newspaper consumption habits have been changing (mainly away from newspapers) across the UK for some time. More recently the decline has steepened, probably because of the internet, although that decline pre-dates most households’ gaining internet access (Figure 11).

Those that appear to have been more successful have followed rather straightforward strategies: reducing cover prices for periods (*The Sun* and *The Times*, which also changed to tabloid format. Other newspapers performing well are suited to a more affluent and older market that is likely to retain an attachment to print media (*Daily Mail* and *Financial Times*).

The circulation of the two Welsh morning newspapers has been in decline for some decades. The graph below shows the south Wales-based newspapers. Between 1997 and 2006 the audited

Figure 10: Market split – Wales and Scotland. Readership

	Wales	%	Scotland	%
The Sun	488,000	24.1	988,000	26.3
Daily Mirror	360,000	17.7	60,000	1.6
Daily Star	137,000	6.8	141,000	3.7
Daily Record	–	–	1,096,342	29.2
Total – redtops	985,000	48.6	2,285,342	60.8
Daily Mail	325,000	16	275,000	7.3
Daily Express	160,000	7.9	131,000	3.5
Western Mail	140,000	6.9	–	–
Daily Post	126,000	6.2	–	–
Aberdeen Press and Journal	–	–	181,007	4.8
Dundee Courier and Advertiser	–	–	201,003	5.4
Total – middle market	751,000	37	788,010	21
Daily Telegraph	103,000	5.1	55,000	1.5
The Times	67,000	3.3	61,000	1.6
The Guardian	65,000	3.2	45,000	1.2
The Independent	47,000	2.3	33,000	0.9
Financial Times	8,000	0.4	12,000	0.3
The Scotsman	–	–	201,537	5.4
The Herald	–	–	276,742	7.4
Total – heavies	290,000	14.3	684,279	18.3

Source: GfK, NOP and NRS

Figure 11: UK circulations 000s

	1965	1985	% Change	2007	% Change
Daily Mirror	4,958,000	3,252,000	-34.4	1,554,000	-52.2
The Sun	1,361,000	4,065,000	198.7	3,043,000	-25.1
Daily Express	3,981,000	1,875,000	-52.9	765,000	-59.2
Daily Mail	2,425,000	1,828,000	-24.6	2,294,000	25.5
The Times	258,000	480,000	86	636,000	32.5
Financial Times	152,000	229,000	50.6	452,000	97.4
The Guardian	276,000	487,000	76.4	371,000	-23.8
Daily Telegraph	1,352,000	1,221,000	-9.7	894,000	-26.8
Independent	-	-		245,000	

Source: Bianchi review of Welsh Language Print Media

Figure 12: Circulation of Selected Morning Titles across the UK, 1995-2005

Newspaper title (morning)	1995	2000	% Change relative to 1995	2005	% Change relative to 2000
Aberdeen Press and Journal	108,963	101,642	-6.7	86,942	-14.5
Newcastle Journal	57,677	50,295	-12.8	38,187	-24.1
The Northern Echo	77,425	66,032	-14.7	55,979	-15.2
Yorkshire Post	79,094	76,424	-3.4	50,541	-33.9
Birmingham Post	28,054	20,922	-25.4	14,256	-31.9
Norwich Eastern Daily Press	79,596	76,579	-3.8	68,599	-10.4
East Anglian Daily Times	49,217	44,755	-9.1	38,538	-13.9
Western Daily Press	62,692	52,373	-14.8	45,115	-13.9
Western Morning News	52,123	51,596	-1.0	42,325	-18
Western Mail	64,602	55,273	-14.4	42,981	-22.2
Ulster Newsletter	33,233	33,435	+0.6	26,270	-21.4

Source: A. Williams and B. Franklin, Turning Around the Tanker: Implementing Trinity Mirror’s Online Strategy, from audit and verified data on the Newspaper Society website (ABC and VFD)

circulation of the *Daily Post* reduced from around 52,000 to 39,651, a 23.7 per cent reduction. Circulations of the *Western Mail* dropped by 30.8 per cent in the same period. It is worth noting that the price of the *Western Mail* in 2001 was 25p, whereas it is now 58p. The circulations of two of Wales’s national titles are shown in Graph 1, with the *South Wales Echo* for the purposes of comparison.

The striking feature of the declining circulations in the graph above is that decline has been steady and appears to be largely impervious to any changes. There appears to have been no significant ‘devolution dividend’ from 1999 in circulation terms. The short-lived increase around 2005 has two possible causes: the Welsh rugby team’s grand slam season and the re-launch of the *Western Mail* in smaller format in October 2004.

Trinity Mirror’s key daily titles, the *Western Mail* and *Daily Post*, have both experienced significant drops in circulation (Figure 13):

Figure 13: Western Mail and Daily Post circulations, 1979, 1997 and 2006

	1979	1997	2006
Western Mail	94,000	61,541	42,578
Daily Post	50,000	52,000	39,651

Source: Williams and Franklin, Turning Around the Tanker

Graph 1: Recent circulation of Western Mail, Wales on Sunday and South Wales Echo

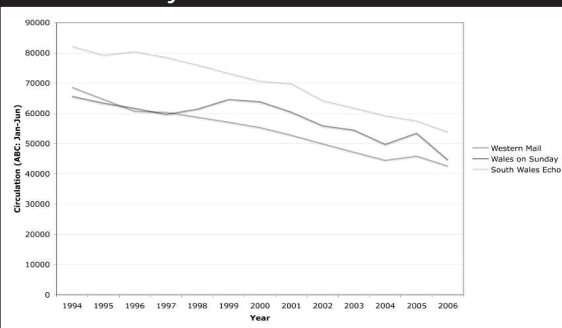


Figure 14: South-east Wales titles

Title (any editions included in total)	January – June 1999	July-December 2007	% Change
Morning newspaper			
Western Mail (Wales-wide; Mon-Sat)	57,035	35,067	-38.5
Metro (South Wales)		27,695	
Evening newspapers			
South Wales Argus (Final/Local/Main)	30,936	28,879	-6.6%
South Wales Argus (Saturday)		26,362	
South Wales Echo (City Final/News Extra/S. Wales)	73,129	47,278	-35.0%
South Wales Echo (Saturday)		40,179	
Weekly newspapers			
Abergavenny Chronicle		8,794*	
Barry & District News	7278	6,755	-7.2%
Caerphilly Campaign Series			
Blackwood, Risca & Newbridge		13,258	
Caerphilly, Ystrad Mynych and Bargoed		27,895	
Pontypridd, Porth, Mountain Ash and Llantrisant		21,884	
Cardiff & South Wales Advertiser			
Celtic Weekly Group	85,216	73,772	-13.4%
Glamorgan Gazette (Bridgend/Valleys)	20,503	21,504	4.9%
Cynon Valley Leader	10,585	10,137	-4.2%
Merthyr Express (Merthyr/Rhymney Valleys)	19,285	17,138	-11.1%
Pontypridd & Llantrisant Observer	10,312	11,429	10.8%
Rhondda Leader	11,770	12,500	6.2%
Gwent Gazette	12,761	11,495	-9.9%
Free Press of Monmouthshire Series	7,920	11,281	42.4%
The Free Press (Chepstow)		4,707	
The Free Press (Abergavenny)		1,420	
The Free Press (Monmouth)		1,383	
The Free Press (Pontypool)		3,771	
Bridgend & Porthcawl Gem (not audited)			
Glamorgan Gem		30,196	
Monmouthshire Beacon & Merlin		5,286**	
Penarth Times	5,715	6,183	8.2%
The Barry Post		22,368	
The Bridgend Post		10,065	
The Cardiff Post		73,772	
Weekly Argus		34,670	

Source: ABC, except *Independently audited for July 2006-Dec. 2006 (JICREG); and **Independently audited January 2006-June 2006 (JICREG)

5.4 Local newspapers

It is evident from the above that the sales of daily Welsh newspapers – whether morning or evening – have been in decline. However, many weekly newspapers have been holding their own, with a sizeable number even increasing their circulations. In total they far outsell even the combined number of daily morning and evening papers (Figure 19). Compare Graph 2, showing the Celtic Weekly Newspaper Group, with Graph 1.

The trend is not unique to local newspapers in south Wales or to Trinity Mirror local publications. The following are examples of other newspapers elsewhere in Wales, including titles from a number with different owners that have also been relatively successful:

- Free Press (North Wales Newspapers Ltd)
- Visitor Series (Trinity Mirror North Wales)
- Holyhead & Anglesey Mail (Trinity Mirror North Wales)
- Western Telegraph (Newsquest (Wales and Western))
- Carmarthen Journal (South West Wales Publications Ltd)

Figure 15: North-east Wales newspaper titles

Title (and editions)	January – June 1999	July – December 2007	% Change
Evening newspapers			
Evening Leader (Chester/Flintshire/Wrexham)	30,068	21,180	-29.6
Weekly newspapers			
Flintshire Chronicle (Mold-Buckley/Flint-Holywell/Deeside)			
Flintshire Standard		31,482	
Free Press (Denbighshire/corwen-Bala/Llangollen)	6,168	7,148	15.9
The North Wales Pioneer		30,522	
The Rhyl, Prestatyn and Abergele Journal		30,287	
The Vale Advertiser		7,466	
Visitor Series	3,503	4,590	31.0
Visitor (Abergele and St Asaph)		2,292	
Visitor (Rhyl and Prestatyn)		1,211	
Visitor (Rhyl/Prestatyn)		24,199	
Wrexham Leader		41,584	
	30,068	21,180	-29.6

Source: ABC

Figure 16: North-west Wales titles

Title	January – June 1999	July – December 2007	% Change
Weekly newspapers			
Yr Herald (weekly supplement in Daily Post)			
Bangor/Anglesey Mail		10,687	
Caernarfon and Denbigh Herald (Arfon/South)	14,085	15,465	9.8
Holyhead & Anglesey Mail	10,802	11,612	7.5
North Wales Chronicle		33,387	
North Wales Series		6,000	
(Meirioneth Express/Corwen Times / Y Cyfnod)			
North Wales Weekly News (Colwyn/Conwy Valley/General)	17,314	22,959	32.6

Source: ABC; *January – June 2007

Figure 17: Mid Wales newspaper titles

Title (and editions)	January – June 1999	July – December 2007	% Change
Evening newspapers			
Shropshire Star (Mid Wales)		5,029	
Weekly newspapers			
The Cambrian News		**24,258	
County Times & Express (Montgomeryshire/Radnorshire)	17,628	17,442	-1.1%
Oswestry & Border Counties Advertiser		10,969	
Brecon & Radnor Express		*11,430	
Chronicle and Journal		**2,738	

Source: ABC *January 06 – June 06 **July 06 – December 06

Figure 18: South-west Wales titles

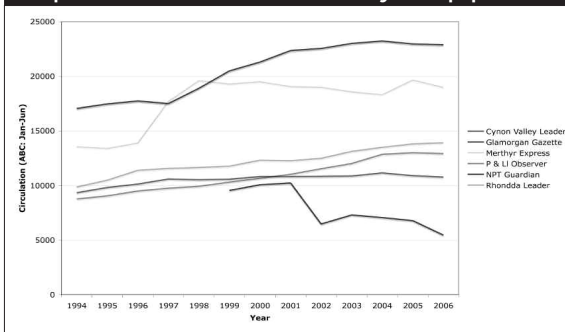
Title (and editions)	January – June 1999	July – December 2007	% Change
Evening newspapers			
South Wales Evening Post (Carmarthenshire / Neath-Port Talbot / Swansea Final)	67,185	51,408	-23.5%
Weekly newspapers			
Neath & Port Talbot Courier (insert in NPT edition of SWEP – Tuesdays)			
Swansea Herald		67,297	
Neath & Port Talbot Guardian (Neath; and Port Talbot)		4,402	
Carmarthen Journal (Gwendraeth/Lampeter-Llandyssul/ St Clears-Whitland/Teifi Valley/ Carmarthen Town/Ammanfoird- Llandeilo-Llandovery)	20,800	22,245	6.9%
Llanelli Star (Burry Port Star / Gwendraeth Star / Main / Llŵchwr Star)	18,392	15,699	-14.6%
Western Telegraph Series (First/East/North)	25,627	27,183	6.1%
Tenby, Narberth & Whitland Observer		6,935	
Cardigan & Tivy-Side Advertiser	8,301	8,466	2.0%
Milford & West Wales Mercury		5,565	
South Wales Guardian		8,533	
County Echo & St Davids City Chronicle			

Figure 19: Sales of indigenous Welsh newspapers

Daily – morning	74,008	5.8%
Daily – evening	220,315	17.3%
Weekly	976,896	76.8%
Total	1,271,219	100*

* Rounding of previous calculations produces a figure just below 100%

Graph 2: Circulations of Celtic Weekly newspapers



The small size and dispersed nature of the Welsh speaking community in Wales means there are very few publications that can survive without the support of wider organizations or some element of public funding. The Welsh Books Council (WBC) gives financial support to 16 publications each year to commercial titles, only three of which might be regarded as either newspapers or current affairs

magazines. These are *Y Cymro*, *Golwg*, and *Barn*. The following data and Figure 20 are drawn from a review of Welsh language print media by Tony Bianchi for the Welsh Language Board and published in January 2008.

Y Cymro, a weekly tabloid newspaper, is the oldest of these publications and was owned by North Wales Newspapers until purchased in 2004 by the *Cambrian News*, part of Tindle News that also owns Radio Ceredigion. *Golwg* receives an annual WBC grant of £18,000. Over the past decade circulation has declined from 5,200 to fewer than 3,000. It is based in north Wales at Porthmadog. It does not have its own website.

Golwg, is a weekly news magazine that is privately owned. It is based in Lampeter in Ceredigion, and receives a WBC grant of £75,000. Its circulation is said to hover around the 3,000 mark.

Barn (Opinion) is a monthly magazine (it publishes 10 issues per annum) and receives an annual WBC grant of £80,000. Its circulation has been in decline and is currently estimated at around 800.

Yr Herald Cymraeg was a free-standing newspaper, but since 2005 it has been an eight-page weekly

Figure 20: Welsh language newspapers/magazines

Name of Publication	Golwg 2006/07	Y Cymro 2006/07	Barn 2006/07*
Owner	Golwg Cyf	Cambrian News / Tindle News	Barn Cyf.
Number of staff (fta)	15	6	2
Price	£1.50	£0.50	£2.25
Sales/issue	2,880	2,800	880
% subscriptions	46.3%	8.2%	40%
Sales +/- since '97	-2.5%	Not known	-32%
Grant/year	£75,000	£18,000	£80,000
Grant/issue	£1,500	£346	£8,000
Grant/each copy sold	£0.52	£0.12	£9.09
Grant as % of income	14%	7%	80%

Figure 21: Papurau bro in Wales, 2008

Title	Distribution	Founded	Title	Distribution	Founded
Yr Angor	Aberystwyth and District	1977	Llafar Bro	Blaenau Ffestiniog	1975
Yr Angor	Merseyside and Manchester	1979	Llais	Tawe Valley	1979
Yr Arwydd	Eastern Anglesey	1983	Llais Aeron	Aeron Valley	1976
Y Barcud	Tregaron and District	1976	Llais Ardudwy	Ardudwy	1975
Y Bedol	Ruthin	1977	Llais Ogwan	Ogwen Valley	1974
Y Bigwn	Denbigh	1988	Llanw Llyn	Llyn Peninsula	1975
Blewyn Glas	Machynlleth	1978	Lleu	Nantlle Valley	1975
Y Cardi Bach	Taf Valley	1979	Y Llien Gwyn	Fishguard and District	1979
Y Clawdd	Wrexham and District	1987	Y Lloffwr	Dinefwr and District	1978
Clebran	Preseli District	1974	Negesydd	Neath Port Talbot	2002
Clecs y Cwm	Neath, Neath and Dulais Valleys	1976	Nene	Rhos and Johnstown	1978
a'r Dref	and Dulais Valleys		Newyddion Gwent	Gwent	2004
Clochdar	Cynon Valley	1987	Yr Odyn	Nant Conwy	1975
Clonc	Lampeter and District	1982	Papur Dre	Caernarfon and District	2002
Cwlwm	Carmarthen	1978	Papur Fama	Mold and District	1979
Cylch	Merthyr Tydfil Valleys	2001	Papur MenaiGlan Menai, Landdona and Brynsiencyn		1976
Dail Dysynni	Dysynni Valley	1979	Papur Pawb	Talybont, Taliesin and Tre'rddôl	1974
Dan y Landsker	Pembrokeshire	2007	Papur y Cwm	Gwendraeth Valley	1981
Y Dinesydd	Cardiff and District	1973	Y Pentan	Conwy Valley	1979
Y Ddolen	Llanfarian and Llanrhystud	1978	Pethe Penllyn	Parish of Penllyn	1974
Eco'r Wyddfa	Llanrug and Llanberis	1976	Plu'r Gweunydd	Llanfair Caereinion, Montgomery, Welshpool and District	1978
Y Fan a'r Lle	Brecon and District	1996	Y Rhwyd	Anglesey	1979
Y Ffynnon	Eifionydd	1976	Seren Hafren	Dyffryn Hafren	1983
Y Gadlas	Conwy and Clwyd	1976	Sosbanelli	Llanelli	2002
Y Gambo	South East Ceredigion	1982	Tafod-Élai	Taff-Ely district and Ynys-y-Bwl	1985
Y Garthen	Teifi Valley	1981	Y Tincer	Bow Street and Borth	1977
Y Glannau	Clwyd Valley	1982	Tua'r Goleuni	Rhymney Valley	1997
Glo Môn	Amman Valley	1977	Wilia	Swansea and District	1977
Y Glorian	Llangefni and District	1977	Yr Wylan	Penrhyndeudraeth and Porthmadog	1977
Goriad	Bangor and Felinheli	1980	Yr Ysgub	Ceiriog Valley and Oswestry	1980
Yr Hogwr	Ogmore and District	1987			

supplement published within the *Daily Post*. The Bianchi review thought that its journalistic scope had narrowed since the change. It also has an online presence. It does not at present receive any funding from WBC.

Alongside these more conventional publications there exist a stratum of voluntary and very local publications – *papurau bro* – that, in the main, were established in the 1970s. Estimates are not often made of the exact reach of *papurau bro*. The Welsh Language Board – which funds their publication – does not produce any readily available circulation or readership figures. Academic research suggests approximately 82,000 issues are published monthly across Wales.⁶ Unsurprisingly, they tend to be strongest in the areas of west and north Wales where the language and / or sense of Welsh identity is strongest.

- North west: north Gwynedd coast and Anglesey;
- North east: the Flintshire–Denbighshire border;
- Mid: the coast;
- South west: southern Pembrokeshire and southern Carmarthenshire;
- South east: in the cities and Valleys towns.

Figure 22: Papurau Bro first publishing dates

Date founded	Number
1973 – 1980	41
1981 – 1990	12
1991 – 2000	2
2001 – 2007	6
Total	61

5.6 UK newspapers and Wales

87% of daily newspaper readership in Wales is accounted for by London based newspapers. The quantity and quality of their coverage of Wales becomes, therefore, a matter of singular importance.

The contrast with Scotland is stark. Historically, the strength of the Scottish press has been a function of Scotland’s distance from London as much as a recognition of difference. The challenge of timely distribution meant that many London newspapers long ago established printing facilities in Scotland with a linked editorial capacity. Investment is not only historical. In early 2008 News International opened a £60m all-colour printing press near Glasgow to print *The Times* and *The Sun*. The latter has also been sold for periods at a cut-price twenty pence in Scotland (and London, where it has also occasionally been distributed without charge), according to its editor.⁷

The majority of London newspapers now have Scottish editions, with significant content difference from the versions available in England and Wales. Some have argued that this is a partial cause of the declining circulation of Scotland’s indigenous press.

Figure 23: London newspapers with Scottish editions

Daily	Sunday
The Scottish Sun	News of the World
Scottish Daily Mirror	Scottish Sunday Mirror
Scottish Daily Mail	Scottish Mail on Sunday
Scottish Daily Express	Scottish Sunday Express
The Daily Telegraph	The Sunday Telegraph
The Times	The Sunday Times
Metro	

Figure 24: London papers without a distinct Scottish edition

Daily	Sunday
The Guardian	The Observer
The Independent	Independent on Sunday
Daily Sport	The People

The only London newspaper to have attempted a Welsh edition in recent times was the *Daily Mirror*, which established a Welsh Mirror in 1999. It had a staff of fourteen. It lasted for four years before succumbing to a £25m programme of economies within the Trinity Mirror group in 2003. At the time the company was reported as claiming a circulation of 130,000.

In terms of print capacity Wales has recently both won and lost. Newsquest, publisher of the *South Wales Argus*, has announced plans to move printing out of Wales to consolidate them with facilities serving titles in the west of England. South West Wales Publications Ltd (part of the Northcliffe-Associated group) has already moved printing of the *South Wales Evening Post* to Gloucester. Trinity Mirror’s £18m printing facility in Cardiff Bay, opened in 2003, is now managed separately from the Welsh titles. There is some irony in the fact that it prints several newspapers and periodicals for minority groups in England such as *Asian Times*, *India Weekly*, and *Caribbean Times*, as well as local newspapers from the south east of England.

The absence of Welsh editions of London newspapers might not be a problem if the reporting of Wales were substantial and consistent. However,

6) Rhodri ap Dyfrig, Elin Haf Gruffydd Jones and George Jones, *The Welsh Language in the Media* (Mercator Media, 2006), p.25

7) Comments by Rebekah Wade to House of Lords, Communications Committee inquiry into media ownership and the news, January 16, 2008

this is far from being the case. The only UK-wide newspaper staff reporter based in Wales represents the *News of the World* and is based in Cardiff. London papers are mainly reliant on the Press Association, which has five staff in south Wales – four general reporters (1 in Swansea, 3 in Cardiff) and a dedicated correspondent at the National Assembly.

The dearth of coverage of Wales has been brought sharply into focus since the advent of devolution, with rising concern about the implications of this situation for the new democratic institution and its ability to engage effectively with its public. Studies of coverage of the Assembly elections in 2003 for the Electoral Commission pointed up the low prominence given to the election by both UK broadcasters and newspapers, although in 2003 it is fair to say that the campaign was overshadowed by Iraq war.

In 2007 although there were fewer reasons to ignore the Assembly election campaign coverage by the UK press was, if anything, weaker than in 2003, and the disparity between coverage of Scotland and Wales greater. On 12 April *The Guardian* carried a leader article on the Assembly elections, under the title 'The forgotten election'. On Saturday, 5 May the first morning on which newspapers could carry the result, the highest selling newspaper in Wales, *The Sun*, carried only thirteen words of coverage, contained within a story on the results of the Scottish elections. This pattern was continued during the long aftermath during which political parties negotiated to form a coalition government.

In broadcasting and online media the BBC Trust was sufficiently concerned about its own performance in this regard to commission an independent review of the BBC's network news and factual coverage of the four nations of the United Kingdom. It is chaired by Professor Anthony King and is expected to report in the summer of 2008.

Its terms of reference are:

"To assess the impartiality of the BBC's network news and factual coverage of the four nations of the United Kingdom, having particular regard to the duly impartial coverage of matters of political controversy

and matters of public policy. In assessing the BBC's coverage, to consider issues of accuracy, context and balance as follows:

- *In considering accuracy, to assess in particular if it is clear whether or not the facts and views conveyed in the output apply to each individual nation;*
- *In considering context, to assess, where relevant, whether or not the nations' differing policies – with regard to both devolved policies and other matters – are appositely reflected in the content and also whether or not significant relevant factors are adequately explained;*
- *In considering balance, to assess in particular whether or not the output gives appropriate weight to the actions and policies of the devolved administrations and at the same time gives due weight to the views expressed by the political parties, other groups and individuals concerning those actions and policies, and also gives due weight to the way points of view may vary both across individual nations and across the UK."*

The review covers factual network coverage of the four nations on radio, television and online. It will concentrate on news and current affairs and news online.

The following analysis of material concerning Wales on newspapers and their websites provides further evidence of the problem.

5.7 A case study of UK reporting of Wales

During the summer of 2007 there were two largely co-terminous and extended stories arising from Wales: the formation of the Labour-Plaid Cymru Assembly Government following the May elections, and the events surrounding the slaughter of Shambo, a bullock that was sacred to Hindu monks in the Skanda Vale community in West Wales. The latter story centred on the dispute between the community and the Welsh Assembly Government after Shambo had tested positive for bovine tuberculosis and its slaughter had been ordered by the Assembly Government.

Between July 15 and August 15, 2007, the number of stories with primary relevance to Wales is shown in the following table:

Figure 25: Stories about Wales in the UK-wide newspapers, mid Jul-mid Aug 2007

Source	Total	Politics	Economy	Human interest	Crime	Social (Shambo)	Entertainment
The Sun	25	1	0	5	7	11 (10)	1
Daily Mail	23	0	0	2	8	12 (11)	1
The Times	19	1	2	1	2	13 (12)	0
Guardian	16	3	2	0	3	8 (8)	0
Daily Telegraph	15	2	0	1	0	12 (12)	0
Independent	6	0	0	0	0	6 (6)	0
Total	104	7	4	9	20	62 (59)	2
Press Association newsfeed (Wales)	30	8	2	4	1	14 (12)	1

Note: Newspaper figures include stories appearing only on the newspapers' websites as well as those appearing in the newspaper itself. Press Association figures total the number of stories appearing in the PA news feed under the 'Wales' category

Figure 26: Stories about Wales in UK-wide newspapers

Category	No of stories	%
Social (Shambo)	62 (59)	59.6 (56.7)
Crime	20	19.2
Human Interest	9	8.7
Politics	7	6.7
Economy	4	3.8
Entertainment	2	1.9
Total	104	100*

* Rounding in calculations means total is just below 100%

The figures show the bulk of reporting during the period was focused on the Shambo story, even at a time when Wales was experiencing, arguably, one of the most significant moments in its recent political history. If these stories are subtracted from the total, there were only 45 other stories about Wales across six UK-wide papers in a 31-day period, and only seven of those stories on political matters. For politics this represents an average of just over one story per paper in the whole period.

The formation of the Labour and Plaid Cymru coalition was largely ignored by the UK-wide print and broadcast media, receiving only a few column inches in the UK-wide 'quality' papers and next to nothing in the tabloid press (and very sparse and superficial coverage in the network broadcast news).

In contrast, the interest shown by news providers in reporting the Shambo case was sustained and detailed. *The Independent*, for example, devoted a two-page feature to the Shambo case and only a few sentences a week earlier in the 'News in Brief' section to the Assembly coalition. Even this cursory attention was more directly prompted by Rhodri Morgan's hospitalisation for heart surgery.⁸ On July 27, the day after the bullock was removed from the temple for slaughter, the story was still being

explored. Three of the principal UK morning dailies featured front page pictures: *the Guardian*, *Daily Mail* and *Daily Telegraph*, with continuing stories in subsequent inside pages.⁹

The appeal of the Shambo story across the UK media was that it had both comical and serious aspects. Critics of the UK media's coverage of Wales, such as Adam Price MP, focused on the comical side of the story: "The death of Shambo the bull got more attention by the BBC in 2007 than the fate of Rhodri Morgan and the Welsh nation, which shows what the media thinks of us as a nation."¹⁰ However, animal-related stories are often popular with media providers in Britain and there was a more serious aspect: the confrontation and disagreement between state law and religious sensibilities.

The UK newspapers focus on UK-wide issues. The coverage of the Shambo case followed months of stories about freedom for religious expression in the UK. The Shambo and 'religion versus state' stories shared a common theme. The Assembly Government, in the Shambo coverage, could have been any organ of the state. When there was a Welsh angle – the devolution of powers to order Shambo's slaughter – some newspapers made mistakes. *The Independent*, for example, was unclear about the roles of the Assembly Government and the UK Department for the Environment, Food and Rural Affairs. The newspaper later carried a clarification.¹¹

The common failure to distinguish between events in Wales and England was instanced in the *Financial Times*, which reported on September 8/9, 2007, that the smoking ban had come into force in England and Wales at the start of July 2007. In fact, the ban in Wales came into force in May 2007 after

8) *The Independent*, July 17, pp. 17 and 26 for Shambo story; July 10, p.13 for Rhodri Morgan and coalition reference

9) *The Guardian*, July 27, pp.1-2; *Daily Mail*, pp. 1 and 3; *Daily Telegraph*, pp. 1 and 19; *The Independent*, pp. 10-11

10) *Golwg*, 'Datganoli darlledu', August 16, 2007; quote is translated from original text: "Fe gafodd tranc Shambo fwy o sylw gan y Gorfforaeth Brydeinig yn 2007 na thynged Rhodri Morgan a'r genedl Gymreig – cymaint yw ei meddwl ohonom ni."

11) *The Independent*, July 28

the Health Act 2006 devolved the power to the Welsh Assembly to initiate a smoking ban in public spaces in Wales separately from the rest of the UK.

An Assembly Government announcement in March 2008 about the phasing out of hospital car parking charges in Wales received some attention in the UK media. However, the debate was only animated after the intervention of Ben Bradshaw MP, Minister of State for Health Services, when he argued that money was being spent more wisely in England on health services.

The variation in services across the UK brought about by devolution is one narrative used by some newspapers. Research into media coverage of the Welsh election in 2003 said that most UK newspaper coverage concentrated very generally on devolution process and threats to the Assembly Government as a Labour administration – specifically threats of nationalism and the Iraq war to Labour – voter apathy, and the potential challenge to devolution posed by low electoral turnout.¹²

This problem is not confined to Wales. In early summer 2007 there were complaints in northern England that floods in Hull received much less attention than floods in southern England that damaged fewer homes and caused fewer deaths.

Robert Torday of ING Media, a public relations firm, suggested to *The Economist* that the decline of manufacturing in some northern English cities caused a crisis of identity and that UK-wide newspapers were realising the 'old cobbled streets' image was out of date but were unsure of how to report instead.¹³

However, given Wales's distinct governance arrangements, the London-centric nature of UK-wide newspapers does have greater implications in Wales than in English regions. The coverage and errors detailed above suggest strongly a lack of awareness about Wales within the UK media which is leading to a persistent marginalisation of Welsh coverage. This surely has an effect on the quality of an informed democracy even if disengagement with politics – as expressed in the May 2007 turnout in Wales of 43.7% – has deeper causes. Combined with the limited nature of Wales's indigenous print media, it is proving difficult to articulate plural narratives on Wales and the UK.

In making the case for increased coverage of Wales it would be necessary to distinguish between UK coverage of news in Wales that will keep UK readers informed of developments across the UK and any possible editionised Wales news provided for readership only in Wales.

12) James Thomas, John Jewell and Stephen Cushion, *Media Coverage of the 2003 Welsh Assembly Elections* (Wales Media Forum, 2003)

13) *The Economist*, 'Magnetic south', August 9, 2007

7. Journalism in Wales

7.1 Introduction

On the face of it the journalism resource in Wales is not insubstantial. The three main employers of journalists are Trinity Mirror, BBC Wales and ITV Wales who, together, employ 551 journalists. To that one would need to add the journalistic staff of weekly newspapers and independent local radio. The BBC is well funded and Trinity Mirror’s operations in Wales are richly profitable, though that does not always translate into editorial resources. ITV Wales is in a less happy position, as a sharer in ITV’s new penury.

To list newspaper and magazine titles, radio and television programmes and websites can create a misleading impression of a layered cornucopia of editorial activity in Wales. It is true that there is a wide range of journalistic effort from the well-resourced professionalism of the BBC to the refreshingly anarchic manifestations of the new media. But there are always resource questions to be raised when examining journalism in Wales, as well as questions about form, content, impact, purpose and ownership.

7.2 Audiences and content

In addition to the above BBC Wales produces and funds the live coverage of the National Assembly and its committee proceedings which are broadcast on S4C2. S4C funds the carriage costs.

The nature of ILR programming is such that discrete current affairs and political programmes do not feature in the schedules, although presenters frequently raise current issues, particularly during the course of phone-in programmes. However, it is incontrovertible that the ILR agenda is much more centred on human interest and entertainment.

Figure 1: Three key employers of journalists

	Journalists	Political	Online
Trinity Mirror*	275	not available	
BBC Wales	231	not available	
ITV Wales	45	4	3

* Includes Media Wales in the south and the Daily Post in the north

Figure 2: Television News and Current Affairs audiences, 2006-2007

	Title (Supplier)	Average audience
News (English)		
BBC Wales	Wales Today	260,000
ITV Wales	Wales Tonight	121,000
News (Welsh)		
S4C	Newyddion (BBC)	23,000
S4C (Young people)	Ffeil (BBC)	10,000
Current Affairs (English)		
BBC Wales	Week in Week Out	110,000
ITV Wales	Wales This Week	176,000
Current Affairs (Welsh)		
S4C	Taro Naw (BBC)	Spring 20,000 Autumn 30,000
S4C	Y Byd ar Bedwar (ITVW)	Summer 24,000 Winter 40,000
Politics (English)		
BBC Wales	Dragon’s Eye	79,000
BBC Wales	The Politics Show	53,000*
BBC Wales	am:pm	9,000
Politics (Welsh)		
S4C	CF99 (BBC)	11,000**
S4C	Pawb a’i Farn (BBC)	28,000
Other factual		
BBC Wales (Consumer)	X-Ray	142,000
ITV Wales (Consumer)	The Ferret	171,000
S4C (Farming)	Ffermio (Telesgop)	–
S4C (Young people)	Hacio (ITVW)	–
S4C (Documentary)	O Flaen dy Lygaid (BBC)	24,000

Source: BBC and S4C

* Audience figure is for 20’ opt-out for Wales

** Audience figure is for 2007-2008, no 2006-2007 figures exist because the show was launched in 2007

Figure 3: Radio News and Current Affairs

	Title (Supplier)
News	
BBC Radio Wales (Breakfast)	Good Morning Wales
BBC Radio Wales (Midday)	Richard Evans Show
BBC Radio Wales (Evening)	Good Evening Wales
BBC Radio Cymru (Breakfast)	Post Cyntaf
BBC Radio Cymru (Midday)	Taro’r Post
BBC Radio Cymru (Evening)	Post Prynhawn
Mainstream current affairs	
BBC Radio Wales	Eye on Wales
BBC Radio Cymru	Manylu
BBC Radio Cymru	Wythnos Gwilym Owen
Politics	
BBC Radio Wales	Called to Order
BBC Radio Cymru	Dau o’r Bae

We have already shown that in the world of newspapers only 13% of newspaper reading is of newspapers that deal primarily with Wales and that the newspapers that account for the other 87% carry very little material about Wales. Television remains the main source of information for the bulk of the population. The journalism that we see on BBC and ITV channels remains the key ingredient in the Welsh information diet.

Although Ofcom records that the audience share won by BBC Wales’s Wales Today (6.30pm) has declined from 40% to 35%, BBC Wales retains the highest audience share of any of the BBC’s regional news programmes and the second highest when you also take ITV’s regional news programmes into account, according to Ofcom. Only UTV’s programme in Northern Ireland has a higher share (39%). As Ofcom said, “BBC One at 6.30pm remains the most watched news slot on UK television” – a powerful testimony to the public appetite for news of its nation or region.

HTV’s Wales Tonight (6.00pm) is one of six ITV early evening regional news programmes to have gained audience share between 2003 and 2007 – from 16% to 18%. The difference in the size of the two audiences does not necessarily stem from the respective merits of each programme, since they inherit very different audiences, BBC Wales’s Wales Today benefiting from the high audience to the BBC 6 o’clock news. But taking the BBC Wales and ITV Wales’s programmes together, between 300,000 and 400,000 people in Wales may watch news of Wales each evening.

Across a week Wales Today reaches 575,000 and Wales Tonight 250,000, so that one could argue that between 20% and 25% of the Welsh population touch base with news of Wales on television each week.

S4C also claims an average audience of 23,000 and a weekly reach of 76,000 for the Welsh language news programme, Newyddion, produced by the BBC and broadcast on S4C at 7.30pm.

The figures for Wales Today and Wales Tonight also give an indication of the possible loss of audience to Welsh news that would follow an ITV withdrawal from regional news. Although some viewers would no doubt transfer to the BBC Wales programme, there would certainly be a very significant drop in the total audience, since ITV would, in those circumstances, be certain to schedule very aggressively against the BBC’s early evening news hour.

Equally concerning is the age distribution of the current audience, which underlines the fear that young people are not engaging with news. Those over 55 represent nearly two-thirds of the BBC Wales programme’s audience and nearly 60% of that of the ITV Wales programme. Although those under 35 represent a smaller percentage of the Wales Today audience, in absolute terms it is watched by nearly twice as many people under 35 as watch Wales Tonight.

Figure 4: Wales Today (BBC) and Wales Tonight (ITV) Weekly reach by age

	Wales Today	%	Wales Tonight	%
Children	20,000	3.5	9,000	3.6
Age 16-24	15,000	2.6	11,000	4.4
Age 25-34	25,000	4.3	12,000	4.8
Age 35-44	60,000	10.4	36,000	14.4
Age 45-54	80,000	13.9	36,000	14.4
Age 55-64	135,000	23.5	62,000	24.8
Age 65+	240,000	41.7	84,000	33.6
Total	575,000		250,000	

Source: BARB

However, the young may not be lost entirely to news. The above figures are almost a mirror image of the age distribution of readers of online newspapers.

Figure 5: UK online newspaper readers by age

Age	Online readers %
15-24	32
25-34	22
35-44	13
45-54	13
55-64	8
65+	5

Source: BMRB/Mintel

Radio cannot be left out of account when considering the effective dissemination of news, information and opinion. The combined reach of the BBC’s two national radio stations in Wales is 576,000 which – making allowances for very different means of measurement – is almost identical to the weekly reach of ITV Wales’s output for Wales.

The range of current affairs and political programmes on BBC radio and, in television, across ITV Wales, BBC Wales and S4C television, reflects the dynamic created by the establishment of the National Assembly in 1999. This led to the strengthening of political staff amongst

broadcasters and newspapers, although it is a common complaint among politicians, predictably, and among elements in the public, that competitive pressures have changed news agendas excessively both in newspapers and in all television channels to cover a wider range of features and interests, with the possible exception of Channel 4 News.

The validity of Ofcom's case for maintaining a degree of pluralism in the news and current affairs field is attested to by the already declining impact of ITV Wales as a competitor to the BBC, particularly outside news and current affairs, as its financial resources shrink.

Every organisation claims to be under severe cost pressures – the BBC because of a tight licence fee settlement, ITV because the fragmentation of audiences is undermining its business model, local radio and newspapers because of revenue performance and, in many cases, market pressure for share performance. However, the BBC is, arguably, the only news organisation in Wales where the journalistic newsgathering resource has not fallen below a critical mass.

Despite difficult market conditions where advertising markets are splintering, media provision can still be profitable. The Western Mail & Echo group, for example, increased its profit margins between 1996 and 2004 from 25.6 per cent to 35.5 per cent and has since pushed towards 40%. At the same time the group reduced staff levels from 799 to 751. Even experienced newspaper executives have wondered whether these kinds of returns are sustainable, since they also bring into question whether listed public companies are an appropriate form of ownership for newspapers that aspire to a serious purpose of sustained and vigorous reporting.

7.3 Online journalism

The internet has increased spectacularly the store of available knowledge for us all. This particular audit of media in Wales could not have been pulled together within the same time frame even 15 years ago. The internet is a boon. It has a remarkable immediacy and allows and encourages interaction and debate. It can offer healthy challenges to conventional journalism.

This is, in some senses, a more open, more democratic trend. Michael Hill, recently appointed editor of the South Wales Echo, and former Head of

Multimedia at Trinity Mirror, said: "journalists must leave the ivory tower and cease viewing journalism as a message handed down on a tablet of stone. They must join the conversation being conducted by bloggers, citizen journalists and readers on the websites and comment posts".¹⁴

At the same time, there is another side to the coin, which is that a combination of cost pressures and the need to fill more media platforms with material, the appeal of free input and technological capability may combine to focus media development on processing, packaging and personalising, rather than on the more costly business of reporting, investigating and analysing.

Many have seen the free newspaper as undermining the notion of professional, paid for journalism. Although use of free titles in Wales lags behind paid-for dailies, south Wales has a version of Associated Newspaper's *Metro* freesheet, which is actually printed and distributed (with some input into advertising and listings content) by Trinity Mirror.

In 2007 Robert Thomson, then editor of *The Times*, told a House of Lords inquiry that user-generated content and multi-skilled journalists had a significant role "but it will not be of a professional standard...that is the element of journalism that is most threatened in the digital age".¹⁵ A Cardiff University report argued that the increased workload for journalists has brought growing reliance on 'pre-packaged news', such as public relations material and news agency copy.¹⁶

Blog-readers will attest anecdotally that the majority of bloggers and blog postings derive their subjects from existing media sources, simply adding a point of view or supplementary facts to a story already in the public domain. It is fairly likely, therefore, that the economies of scale will still apply and the best-resourced providers in Wales – the BBC, Trinity Mirror, regional providers and the UK-wide providers – will continue to have the resources needed to set much of the news agenda, for the time being at least.

14) B. Franklin and A. Williams, *Turning Around the Tanker*

15) House of Lords, Communications Committee Inquiry, *Media Ownership and the News*, uncorrected transcript, July 18 2007

16) J. Lewis, A. Williams, B. Franklin et al, *The Quality and Independence of British Journalism* (Cardiff University, 2008)