

## Executive summary

What is the way forward for the newspaper industry? For individual newspaper companies? What are the short-term and long-term steps to take in order to be successful? While armies of consultants will give newspaper companies thousands of pearls of wisdom, the real answers to the burning questions about how to plan for the future is, “It depends.”

It depends on the market forces: the competitors, the audience, the new technologies, the market interruptions. And, it depends on the individual innovations and contributions from our own industry.

The scenario planning process is a unique instrument to get to the heart of the burning questions about our collective and individual futures. Scenario planning allows us to explore the many uncertainties in our future, and imagine how we can address these issues before they become crises.

Scenario planning helps companies capture opportunities and remain on the leading edge. By making the future come alive, we can understand with both our hearts and minds

what society and our industry might be like in the future. Scenarios help both individuals and newspaper companies choose best strategies before competitors do.

In autumn of 2007, the World Association of Newspaper engaged the futurist consultancy, Kairos Future, in Stockholm to help build a scenario planning event for executives of newspaper companies around the world. The event took place in January 2008, after months of research into the uncertainties about advertising, circulation, technology, audience, competition, politics and scores of other issues that impact our future. Among the research were in-depth interviews with eight of the world’s most prominent newspaper publishers from four continents, plus a stockpile of media research from WAN and Kairos Future.

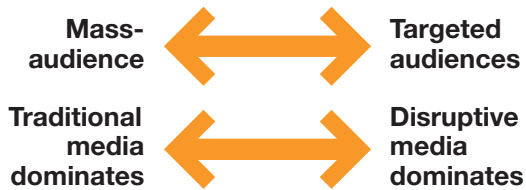
The research was parlayed into the content for the two-day event in Paris. Nineteen executives from 15 countries and five continents actively participated in the event. The participants worked in four groups to develop detailed scenarios about the future of newspaper companies.

Ultimately, some of the components of the practice scenarios produced in the workshop sessions are reflected in the scenarios for this report.

The process was deceptively simple. After careful consideration of 66 concepts culled from the research, workshop participants voted on the most important uncertainties, and explored how these issues would play into scenarios of their choosing.



WAN Scenario Planning event participants deliberate scenarios about advertising, technologies and market forces.



By crossing the two sets of uncertainties, this provides the ability to analyse four possible scenarios.

- **Scenario A:** Disruptive media dominate / Targeted audiences
- **Scenario B:** Traditional media dominate / Targeted audiences
- **Scenario C:** Traditional media dominate / Mass audiences
- **Scenario D:** Disruptive media dominate / Mass audiences

The final scenarios were chosen and developed by WAN and Kairos Future. Each scenario was built to describe what kind of future would hold for newspapers if, for example, disruptive media dominated, and targeted audiences dominated, by 2020. Each detailed scenario in this report reflects imagined impact on the media world, particularly newspapers, from the perspectives of revenues, audience share, competition, and the like.

The scenarios provide a glimpse into the future, and a variety of ideas to execute to avoid futures that are detrimental to the industry, as well as ideas to build newspaper companies to respond faster and more effectively in a media landscape that is prone to rapid change, without hope of let-up in the foreseeable future.