

## Executive summary

What will newspapers be like in 2020? What kind of content? What size? Will they be free or will they have a cover price? Will they be delivered in different time intervals and to a different set of subscribers? Will they be more tailored to targeted groups? Will they look and feel like magazines? Will printed newspapers morph into digital products? How will journalistic storytelling be transformed? What role will newspapers play in democratic societies in 2020? Will trust play a role in audiences favouring newspapers over less reliable media?

The World Association of Newspapers posed these and other questions to two dozen futurists, academics, industry suppliers, Internet pioneers and other media gurus around the globe in late 2007. Each submitted a detailed essay explaining his own theories on the future of the newspaper, and bolstered these hypotheses with sage opinions and historical facts. Each essay represents a unique vision. Each essay provides food for thought for publishers planning for the futures of their media businesses.

The essayists are Michael Raynor, bestselling author, Canada; Gerd Finkbeiner, CEO of Man Roland, Germany; Richard Watson, futurist at Future Exploration Network, Australia; Gordon Borrell, president of Borrell Associates, United States; Craig Newmark, founder of Craigslist.org, United States; Flavio Ferrari, CEO of IBOPE research house, Brazil; Jeff Jarvis, blogger at Buzzmachine.net and head of the interactive journalism program at City University of New York, United States; Bob Cauthorn, president of CityTools.com and former general manager of SFGate.com, United States; Tomas Brunegård, CEO of Stampen Group, Sweden; Rob Curley, vice president of new product development at Washington Post Newsweek Interactive, United States; Chris Bisco, CEO of CN Group, United Kingdom; Juan Antonio Giner, founding partner, Innovation Consulting, Spain; Roger Black, CEO of Roger Black Inc. design, United States; Takashi Ishioka, strategic consultant for Dream Incubator and former head of Asahi Shimbun's media strategies, Tokyo; Moritz Wuttke, CEO Asia Pacific and China, Publicitas, China;

Mario Garcia, CEO of Garcia Media, United States; Stephen Gray, managing director of the Newspaper Next project for the American Press Institute, United States; Stig Eide Sivertsen, CEO of Telenor's Broadcasting Division, Norway; Rosental Calmon Alves, professor, University of Texas, United States; Andrew Nachison, president, IFocos.com, United States.

The compilation of essays has been organised into six chapters with themes that reoccurred among the submissions, including:

- Newspapers' Successful Future
- A Magazine Future
- Fostering Trust in Newspaper Brands
- Building Networks
- Shifting Business Models
- Channel Expansion

Here are some excerpts from each of the essayists:

"Between now and 2020, I see a transformation of newspapers. They will move from the 100-year-old model of paid circulation, black-and-white news and advertising to a mostly "free" distribution model, with lots of colour and graphics. In essence, they will need to differentiate themselves by becoming less like newspapers and more like local magazines."

*Gordon Borrell*

"Regardless of the name of the service, the core competency of news and newspaper publishers of the future will consist of generating content from highly efficient networks, technically process and manage them via networks and continuously or at regular intervals disseminate these contents through a multitude of channels. The recipients of the content will increasingly want to decide for themselves which channel they want to use at which time – letters and images on conventional or electronic paper, the Internet, mobile phones or a combination of various information carriers."

*Gerd Finkbeiner*

"As digital media takes an increasing hold on the news industry, audiences, in turn, will demand news reporting in which they can place the trust and confidence once reserved primarily for newspapers. Collaborative filtering tools and trust metrics will help to achieve those ends."

*Craig Newmark*

"A newspaper's brand is its foundation and its greatest value. The newspaper is an institution with the greatest credibility on earth. A newspaper's brand represents a reader's trust, based on the supposed expertise of collaborators to understand the world, identify what is relevant, deeply investigate and report with faithfulness and impartiality, clearly distinguishing fact from opinion and publicity. This is what makes a newspaper different from other players in the market, even those equally capable of managing and distributing information."

*Flavio Ferrari*

"Oh, printed products may well continue and in some countries still grow. But I wouldn't mourn their deaths so long as we find ways for their journalism to live on and prosper. A newspaper mustn't define itself by its medium. It isn't just paper. Its strength and value do not come from controlling content or distribution. And protecting those dwindling advantages is not a viable strategy for growth – or survival."

*Jeff Jarvis*

"Indeed, the more that life becomes globalised, digital and virtual, the more, I would argue, people will seek out products like newspapers that slow things down a little and tell us what's important and what's not, especially at a local level. And let's also not forget that physical newspapers, like books, are superb examples of industrial design, which, if invented today, would be greeted as a miracle innovation. They don't need power, there's no screen glare, they don't crash and when you're finished with them they can be safely recycled."

*Richard Watson*

"By 2020 smart newspaper networks allow readers to receive best-of-breed material in all specialties. The un-bundling of the newspaper that began in the early 21<sup>st</sup> century has resulted in the un-bundling of the newsroom itself. Now readers sip from rich networks of content providers who excel in individual areas."

*Robert Cauthorn*

"Newspaper companies will look very different in 2020. There are many reasons to be confident that our industry has the vision, the energy and the fundamental business strengths to emerge by 2020 as a multi-media communications business with a wider market to operate in than it had before 2007."

*Chris Bisco*

“The future, it appears, will be one in which more information of more kinds becomes more easily available to more people. With or without printed newspapers themselves – the first near-universal information medium – it appears the purpose and the legacy of the newspaper will continue to be fulfilled.”

*Stephen Gray*

“It is all about people who see opportunities where others see threats, who are creative when others are not and who are eager to get training in subjects they need for the future. They all have to be passionate about the future of media. They should, because there have never been so many opportunities in the media market.”

*Tomas Brunegård*

“Newspapers are going to survive. Will we be doing things the way we’ve always done them? Absolutely not. In the United States, there are two types of newspaper publishers – those who think the most important part of the word newspaper is “news” and those who think the most important part of that word is “paper.”...We can’t be afraid of reaching our audience in new ways. It will be one of the keys to our industry’s successful future.”

*Rob Curley*

“Forget the Internet. It’s not the enemy. (Indeed the Internet will ultimately save the newspaper). Readers don’t read newspapers not just because they get their news online, but because they find them boring. There are major societal changes involved. Journalists are still working in a tradition that began with the young democracy.”

*Roger Black*

“In order to grow profits in a mature economy, the key is to be able to handle the rapidly changing consumer needs by making new products and leveraging development capabilities... Thinking of the shape of the newspaper in 2020, it is not about new media formats, but rather it is about newspapers having to determine what is the added value that is provided.”

*Takashi Ishioka*

“The printed newspaper will get smaller and become mostly free. New technology and combination probably with mobile phones will make even the printed newspaper much more interactive than today. Low voltage e-paper or other paper-replacing foldable screens will be available to offer an alternative to the paper version, but very little interactive or cost-efficient in regards to information retrieval.”

*Moritz Wuttke*

“Innovation believes in the future of newspapers, but the newspapers of the future will be very different, better and more profitable than ever if they embrace change and innovation without losing the core and soul of our business: journalism.”

*Juan Antonio Giner*

“The most successful newspapers of the last decade launched Internet businesses that behaved as strategic options for the core newspaper franchises. Similarly, the most successful papers of the next decade are likely to be those that continue to launch new ventures not as replacements for the paper, or as catalysts for its imminent transformation, but instead as options on future shifts in strategy in response to changes that today can only be dimly imagined.”

*Michael Raynor*

“It takes tremendous time, effort and work to convince traditional print editors that they are now part of a 24/7 news gathering and storytelling process, and that the printed product is only one of the various platforms through which news and information are dispensed. Management plays a key role.”

*Mario Garcia*

“The real disruptors of the next decade won’t be companies, but people – creative, entrepreneurial opportunists who are transforming the global economy – developers, designers, marketers, sales people, business analysts, project managers, accountants, lawyers and other professionals scattered around the globe, connecting and working from anywhere to build businesses and solve problems everywhere.”

*Andrew Nachison*

“Technical innovations will change the future of newspapers. Computers and mobile handsets double their capacity every nine months. This allows media companies to continuously introduce new and improved services. New technical innovations and improvements also drive change in human behaviour. Today, teens must be connected to their friends at all times. Their technical devices become part of their personal identity. As a result, teens carry a potential distribution channel for news and entertainment with them at all times.”

*Stig Eide Sivertsen*

“If newspaper companies are to survive and prosper in this new environment, managers of firms will need to engage in strategic planning and implementation that builds upon existing capabilities and uses existing skills, knowledge and capacity to improve existing papers and introduce new products that provide access to parts of the public not well served today.”

*Robert Picard*

It is our sincere wish at the World Association of Newspapers that newspaper publishers are inspired by the wisdom of these essayists to take action to prepare for their individual futures in their newspaper markets.