An analysis of the content of local and regional newspapers
A report prepared for Ofcom
...the local press in Guildford dominates the supply of local content and also takes the vast majority of specifically locally available advertising, given the tight focus of the Surrey Advertiser and Surrey Times on Guildford itself...

<table>
<thead>
<tr>
<th></th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCAL CONTENT</td>
<td>ITV1 broadcasts 47 minutes of regional news per day</td>
<td>11% local news and traffic / travel</td>
<td>100% Surrey Advertiser and Surrey Times content Surrey focused</td>
<td>100% GetSurrey content is locally focused on Surrey</td>
</tr>
<tr>
<td>GUILDFORD FOCUSSED CONTENT</td>
<td>NONE</td>
<td>20% of wider Surrey Output</td>
<td>About 30% of each newspapers content is Guildford focused</td>
<td>13% of “GetSurrey” content is Guildford focused</td>
</tr>
<tr>
<td>TOTAL GUILDFORD TARGETED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GUILDFORD SOURCED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Oliver & Ohlbaum
...there has been a noticeable decline in the volumes of classified advertising at the Surrey Advertiser, down 30% since 2003, mostly driven by declines in the jobs and motors sector...

Surrey Advertiser: total book content by type, 2003

Proportion of content by type (%)

TOTAL COLUMN INCHES = 9511

EDITORIAL 63%
CLASSIFIED 57%
DISPLAY 15%

INVESTIGATIVE 15%
OPINION, EDITORIAL & FEATURES 22%
PROPERTY 9%
OTHER 67%
SELF PROMOTION

Surrey Advertiser: total book content by type, 2008

Proportion of content by type (%)

TOTAL COLUMN INCHES = 8861

EDITORIAL 59%
CLASSIFIED 61%
DISPLAY

INVESTIGATIVE 10%
OPINION, EDITORIAL & FEATURES 31%
PROPERTY 39%
OTHER 38%
SELF PROMOTION

Source: Surrey Advertiser, Oliver & Ohibaum Analysis
...there has been little change in the mix of editorial content in the Surrey Advertiser in the last 5 years...

Surrey Advertiser: Editorial content by story genre, 2003 and 2008

- The overall genre mix is also broadly consistent
- An increase in Culture content – some of which can also be syndicated – is the only noticeable change

Source: Surrey Advertiser, Oliver & Ohlbaum Analysis
...the merger of the Guildford Times with the Cranleigh and Godalming Times has actually led to an increase in the amount of high quality investigative journalism / opinion...

Surrey Times (then Guildford times): Total book content by type, 2003

Proportion of content by type (%)

Surrey Times: Total book content by type, 2008

Proportion of content by type (%)
CONTENT PROVISION
Newspapers – Surrey Times editorial

…the increase in opinion & editorial pages has led to an increase in culture, info & events content, increasing and improving the overall editorial offering…

Surrey Times/Guildford Times: editorial content by type, 2003 and 2008

• The overall genre mix is broadly consistent
• An increase in culture content and decrease in news are the only noticeable changes

Source: Surrey Times, Guildford Times, Oliver & Ohlbaum
…there are 61 websites focused on providing local content and classified advertising to the Surrey/Guildford region…

Number of Guildford/Surrey focused websites providing local content by type, February 2009

Source: Oliver & Ohlbaum Analysis
...there are 61 websites focused on providing local content and classified advertising to the Surrey/Guildford region...

Number of Guildford/Surrey focused websites providing local content by type, February 2009

Number of websites

Source: Oliver & Ohlbaum Analysis
CONTENT PROVISION
Localness of website content

…the main websites focusing on news provision in Surrey cover a wide range of stories and issues from across the region with Guildford under-represented compared to the population proportion it accounts for…

Get Surrey and Surrey Life: website editorial content by story locality, March 2009

- GetSurrey has 13% of its editorial output focused on Guildford, compared to a population which represents 20% of Surrey
- Surrey Life provides even less Guildford specific content, again with a broad range of stories and content from across the county

Source: Get Surrey website, Surrey Life website, Oliver & Ohlbaum Analysis
Section 1: Guildford
  - Summary
  - Newspaper content analysis
  - Online content

Section 2: Greater Manchester (Salford)
  - Summary
  - Newspaper content analysis
  - Online content

Section 3: Lincoln
  - Summary
  - Newspaper content analysis
  - Online content

Section 4: Mansfield
  - Summary
  - Newspaper content analysis
  - Online content

Section 5: Norwich
  - Summary
  - Newspaper content analysis
  - Online content

Section 6: Cardiff
  - Summary
  - Newspaper content analysis
  - Online content

Section 7: Glasgow area (Paisley)
  - Summary
  - Newspaper content analysis
  - Online content

Section 8: Belfast
  - Summary
  - Newspaper content analysis
  - Online content
Manchester is a large and vibrant local media market, gaining a disproportionate amount of national advertising spend due to its position as one of the UK’s most important cities.

<table>
<thead>
<tr>
<th>LOCAL CONTENT</th>
<th>NETWORK TV</th>
<th>LOCAL TV: CHANNEL M</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ITV1 broadcasts 47 minutes of regional news per day</td>
<td>Local content throughout the day</td>
<td>11% local news and traffic / travel</td>
<td>The Manchester Evening News is but for a small amount of national stories, 100% Manchester focused</td>
<td>80% of MEN online is focused on local content</td>
</tr>
<tr>
<td>MANCHESTER FOCUSED CONTENT</td>
<td>NONE EXPLICITLY</td>
<td>100% of above</td>
<td>50-90% of the above, depending on station</td>
<td>Vast majority of the Manchester Evening News. Small borough publications even more targeted</td>
<td>See above</td>
</tr>
<tr>
<td>TOTAL MANCHESTER TARGETED ADVERTISING</td>
<td>REDACTED</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MANCHESTER SOURCED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Oliver & Ohlbaum
...The Manchester Evening News has remained fairly consistent in content supply by type, although it has seen a reduction in investigative journalism in recent years...

Manchester Evening News: total book content by type, 2003


Source: Manchester Evening News, Oliver & Ohlbaum Analysis
Manchester Evening News: editorial content by story genre, 2003 and 2008

The sport section moved from a supplement to the main paper between 2003 and 2007, and as a consequence changed the genre mix:

- The main consequence of the integration of the sports section was the complete removal of culture in editorial content.
- Coverage of most of the other key genres has remained fairly consistent.

Source: Manchester Evening News, Oliver & Ohlbaum Analysis
CONTENT PROVISION
Websites by type

…there are 69 websites focused on providing local content and classified advertising to the Greater Manchester and Salford region…

Number of Greater Manchester and Salford focused websites providing local content by type, March 2009

Source: Oliver & Ohlbaum Analysis
...there are 69 websites focused on providing local content and classified advertising to the Greater Manchester and Salford region...

Number of Greater Manchester & Salford focused websites providing local content by type, March 2009

<table>
<thead>
<tr>
<th>Type</th>
<th>Number of Websites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Government owned/sponsored</td>
<td>13</td>
</tr>
<tr>
<td>Non commercially focused sites</td>
<td>6</td>
</tr>
<tr>
<td>Commercial sites</td>
<td>19</td>
</tr>
<tr>
<td>Newspapers</td>
<td>4</td>
</tr>
<tr>
<td>Radio</td>
<td>9</td>
</tr>
<tr>
<td>Education</td>
<td>3</td>
</tr>
<tr>
<td>Sports</td>
<td>2</td>
</tr>
<tr>
<td>Classifieds</td>
<td>2</td>
</tr>
<tr>
<td>Local Information</td>
<td>2</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>2</td>
</tr>
<tr>
<td>Local Issues &amp; Campaigns</td>
<td>2</td>
</tr>
<tr>
<td>Local Council &amp; Politics</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Oliver & Ohlbaum Analysis
…the main websites focusing on news and information provision in Greater Manchester have a heavy focus on regional content with wider UK content being largely under represented…

Manchester Evening News & Greater Manchester Online: website editorial content by locality, March 2009

- Greater Manchester online has no UK wide content, it focuses on regional news, information and events
- Manchester evening news has some UK content but it is dominated by regional editorial content

Source: Manchester Evening News online, Greater Manchester online, Oliver & Ohlbaum Analysis
CONTENT PROVISION
Localness of website advertisement content

…they carry a mix of both regional and national advertising…

Manchester Evening News & Greater Manchester Online: website advertisement content by locality, March 2009

- Manchester Evening News has a higher proportion of UK wide advertisements while the opposite is true for Greater Manchester Online

Source: Manchester Evening News Online & Greater Manchester Online, Oliver & Ohlbaum Analysis
Contents

Section 1: Guildford
- Summary
- Newspaper content analysis
- Online content

Section 2: Greater Manchester (Salford)
- Summary
- Newspaper content analysis
- Online content

Section 3: Lincoln
- Summary
- Newspaper content analysis
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Section 4: Mansfield
- Summary
- Newspaper content analysis
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Section 5: Norwich
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- Newspaper content analysis
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Section 6: Cardiff
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- Newspaper content analysis
- Online content

Section 7: Glasgow area (Paisley)
- Summary
- Newspaper content analysis
- Online content

Section 8: Belfast
- Summary
- Newspaper content analysis
- Online content
LINCOLN
Summary

… the local press in Lincoln dominates the supply of local content and also takes the vast majority of specifically locally available advertising as the major radio stations have a wider Lincolnshire focus …

<table>
<thead>
<tr>
<th></th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCAL CONTENT</td>
<td>ITV1 broadcasts 47 minutes of regional news per day</td>
<td>11% local news and traffic / travel</td>
<td>Vast majority of the Lincoln Target is Lincoln focused while the Lincolnshire Echo is regional</td>
<td>41% of thisislincolnshire is local focused content</td>
</tr>
<tr>
<td>LINCOLN FOCUSED CONTENT</td>
<td>NONE</td>
<td>Only Siren FM, the community radio station, is completely dedicated to Lincoln</td>
<td>The Lincoln Target offers 100% Lincolnshire news, with nearly 80% being Lincoln focused. The Lincolnshire Echo gives more focus to Lincolnshire news and some national content</td>
<td>SEE ABOVE</td>
</tr>
<tr>
<td>TOTAL LINCOLN TARGETED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td>REDACTED</td>
</tr>
<tr>
<td>LINCOLN SOURCED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td>REDACTED</td>
</tr>
</tbody>
</table>

Source: OFCOM, Oliver & Ohlbaum Analysis
…the proportion of classified and displayed content has increased in the book, this has been driven by property advertising, previously this appeared in a separate supplement accompanying the paper…

Source: Lincolnshire Echo, Oliver & Ohlbaum Analysis
...political content is no longer part of the editorial content but business content has risen significantly...

Lincolnshire Echo: editorial content by story genre, 2003 & 2007

- Politics was not featured in the editorial content of the 2007 Lincolnshire Echo
- Business content rose by 16% between 2003 and 2007
- Otherwise the genre mix remained fairly consistent over the two periods

Source: Lincolnshire Echo, Oliver & Ohlbaum Analysis
…there are 16 websites focused on providing local content and classified advertising to the Lincoln region…

Number of Lincoln focused websites providing local content by type, April 2009

Source: Oliver & Ohlbaum Analysis
CONTENT PROVISION
Websites by type

...majority of Lincoln websites are content focused...

Number of Lincoln focused websites providing local content by type, April 2009

Source: Oliver & Ohlbaum Analysis
CONTENT PROVISION
Localness of website content

…both websites have a strong regional/wider UK focus …

thisislincolnshire, visitlincolnshire: website editorial content by story locality, March 2009

- Thisislincolnshire is the website for the Lincoln Target newspaper and all Lincolnshire Media Ltd’s Lincolnshire based newspapers thus explaining the inclusion of local, regional and UK wide editorial content.
...visitlincolnshire only carries regional advertisements where as thisislincolnshire carries both regional and UK – wide advertisements...

thisislincolnshire, visitlincolnshire: website advertising content by story locality, March 2009

- Thisislincolnshire carries both regional and UK wide advertisements
- There are no local, Lincoln focused advertisements on thisislincolnshire because it is not just the website for the Lincoln based newspaper but also other towns that make up the region of Lincolnshire

Source: thisislincolnshire, visitlincolnshire, Oliver & Ohlbaum Analysis
### MANSFIELD

Summary

… the local press in Mansfield takes the vast majority of specifically locally available advertising…

<table>
<thead>
<tr>
<th>LOCAL CONTENT</th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITV1 broadcasts 47 minutes of regional news per day</td>
<td>11% local news and traffic / travel</td>
<td>The Chad offers 68% of local, Mansfield news, the Observer and the Recorder produce at least a third of Mansfield news</td>
<td>There are 20 websites focussed on Mansfield</td>
<td></td>
</tr>
<tr>
<td>MANSFIELD FOCUSED CONTENT</td>
<td>NONE</td>
<td>Mansfield FM is strongly Mansfield focussed. Mansfield has an online community station that is completely dedicated to Mansfield</td>
<td>The vast majority of the Chad is Mansfield focussed while the other two papers are more regional</td>
<td>SEE ABOVE</td>
</tr>
<tr>
<td>TOTAL MANSFIELD TARGETED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td>REDACTED</td>
</tr>
<tr>
<td>MANSFIELD SOURCED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: OFCOM, Oliver & Ohlbaum
CONTENT PROVISION
Newspapers – Mansfield & Ashfield Chad (Ashfield edition)

…the book content has remained fairly consistent with a notable increase in both jobs and property classifieds…

Ashfield Chad: total book content by type, 2003

Proportion of content by type%

TOTAL COLUMN INCHES = 8256

- Investigative: 9%
- Legal: 2%
- Jobs: 16%
- Property: 13%
- Motors: 8%
- Opinion, Editorial & Features: 16%
- Other: 21%

Ashfield Chad: total book content by type, 2007

Proportion of content by type%

TOTAL COLUMN INCHES = 7243

- Investigative: 17%
- Legal: 6%
- Jobs: 21%
- Property: 21%
- Education: 4%
- Other: 74%

Source: Mansfield & Ashfield Chad, Oliver & Ohlbaum
...there has been a marked decrease in Info/Events reporting and an increase in Sports and News reporting...

- The increase in News reporting, from 28% of total editorial content to 34%, could be correlated to the 18% increase in investigative editorial content.
- Sports reporting has increased by 13%.
- Info/events content is taking up a smaller proportion of editorial content, this could be linked to an increase in more investigative journalism.
- Otherwise the genre mix of editorial content has remained fairly consistent.

Source: Mansfield & Ashfield Chad, Oliver & Ohlbaum
...there are 20 websites focussed on providing local content and classified advertising to the Mansfield region...

Number of Mansfield focussed websites providing local content by type, April 2009

<table>
<thead>
<tr>
<th>Number of websites</th>
<th>Local Council &amp; Politics</th>
<th>Local Issues &amp; Campaigns</th>
<th>Local Information</th>
<th>Arts &amp; Culture</th>
<th>Newspapers</th>
<th>Radio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sites owned by traditional offline media</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>6</td>
</tr>
</tbody>
</table>
...there are 20 websites focussed on providing local content and classified advertising to the Mansfield region...

Number of Mansfield focussed websites providing local content by type, April 2009

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of Websites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Council &amp; Politics</td>
<td>2</td>
</tr>
<tr>
<td>Local Issues &amp; Campaigns</td>
<td>3</td>
</tr>
<tr>
<td>Local Information</td>
<td>2</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>1</td>
</tr>
<tr>
<td>Newspapers</td>
<td>1</td>
</tr>
<tr>
<td>Radio</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: Oliver & Ohlbaum
Chad.co.uk has a mix of local, regional and UK wide editorial content. This is because the chad.co.uk is one website carrying content from a number of newspapers in the Nottinghamshire area.

Thinkmansfield.com is a completely local website, introducing and selling the Mansfield area to readers.
CONTENT PROVISION
Localness of website advertisement content

…there are no advertisements on thinkmansfield.com but thechad.co.uk takes a considerable amount of wider regional advertising…

Chad.co.uk: website advertisement content by story locality, March 2009

- There are no advertisements on the thinkmansfield website - it is supported by the local council
- Chad.co.uk carries mainly regional or UK and international advertisements, again this is because this website carries the news for multiple areas in Nottinghamshire

Source: chad.co.uk, Oliver & Ohlbaum
### Summary

…the local press in Norwich seems to dominate the supply of local content as well as carrying the vast majority of specifically locally available advertising …

<table>
<thead>
<tr>
<th>LOCAL CONTENT</th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITV1 broadcasts 47 minutes of regional news per day</td>
<td>11% local news and traffic / travel</td>
<td>The Eastern Daily Press is a regional paper while the Norwich Advertiser and Norwich Evening News are strongly Lincoln focussed</td>
<td>There are 39 websites dedicated to providing local content to the Norwich area</td>
<td></td>
</tr>
<tr>
<td>NORWICH FOCUSED CONTENT</td>
<td>NONE</td>
<td>Radio Norwich and Future Radio, the community station, are dedicated to Norwich</td>
<td>66% of the Norwich Advertiser’s content is Lincoln focussed as is around 30% to 40% of the Evening News’ content</td>
<td>51% of advertiser24.co.uk is local (Norwich) content and 47% of eveningnews24.co.uk is local content</td>
</tr>
<tr>
<td>TOTAL NORWICH TARGETED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NORWICH SOURCED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: OFCOM, Oliver & Ohlbaum
...the composition of the book content by type has remained fairly static, the most notable change being a reduction in Motors classifieds over the two periods...

Source: Eastern Daily Press, Oliver & Ohlbaum
Sports content has been introduced to the paper and News editorial content has increased. The News content has increased significantly partially compensating for the decrease in Other content.
...in both years editorial content has made up the majority of total book content but in 2007 classified content had reduced significantly...


Source: Norwich Evening News, Oliver & Ohlbaum
...the genre mix of editorial content has remained fairly consistent...


- The genre mix has remained fairly consistent
- The only noticeable changes being a slight increase in Sport and a decrease in News content
CONTENT PROVISION
Websites by type

…there are 39 websites focussed on providing local content and classified advertising to the Norwich area…

Number of Norwich focussed websites providing local content by type, April 2009

Number of websites

<table>
<thead>
<tr>
<th>Category</th>
<th>New media only outlets</th>
<th>Local Government owned/sponsored</th>
<th>Sites owned by traditional offline media</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCAL COUNCIL &amp; POLITICS</td>
<td>4</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>LOCAL ISSUES &amp; CAMPAIGNS</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LOCAL INFORMATION</td>
<td>11</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>ARTS &amp; CULTURE</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DIRECTORIES</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NEWSPAPERS</td>
<td>1</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>RADIO</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Oliver & Ohlbaum
CONTENT PROVISION
Websites by type

…the majority of these 39 websites are commercially focussed…

Number of Norwich focussed websites providing local content by type, April 2009

Number of websites

Source: Oliver & Ohlbaum
CONTENT PROVISION
Localness of website content

...both websites have a near even split of regional and local editorial content...

Advertiser24 and Evening News24: website editorial content by story locality, March 2009

- Though both are local newspaper websites they cater for both Norwich and the Norfolk region in their editorial content

Source: Norwich Evening News website, Norwich Advertiser website, Oliver & Ohlbaum
CONTENT PROVISION
Localness of website advertisement content

…the advertiser24 caters more for Norfolk regional and national advertisers…

Advertiser24 and Evening News24: website advertisement content by locality, March 2009

- 87% of the advertisements on advertiser24 are regional or UK wide where as only 48% of the advertisements on eveningnews24 are regional or UK wide

Source: Norwich Evening News website, Norwich Advertiser website, Oliver & Ohlbaum
<table>
<thead>
<tr>
<th>Section</th>
<th>City</th>
<th>Summary</th>
<th>Newspaper content analysis</th>
<th>Online content</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Guildford</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Newspaper content analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Online content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Greater Manchester (Salford)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Newspaper content analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Online content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Lincoln</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Newspaper content analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Online content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Mansfield</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>Newspaper content analysis</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Online content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Norwich</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary</td>
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<td></td>
<td></td>
<td>Newspaper content analysis</td>
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<tr>
<td></td>
<td></td>
<td>Online content</td>
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<td></td>
</tr>
<tr>
<td>6</td>
<td>Cardiff</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary</td>
<td></td>
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<td></td>
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<td>Newspaper content analysis</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Online content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Glasgow area (Paisley)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Newspaper content analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Online content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Belfast</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summary</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Newspaper content analysis</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Online content</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CARDIFF
Summary

…the local press in Cardiff dominates the supply of local content and also takes the vast majority of specifically locally available advertising – this is due to the tighter focus of newspapers on Cardiff itself in comparison with the major radio stations which target South Wales more widely…

<table>
<thead>
<tr>
<th>LOCAL CONTENT</th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITV1 broadcasts 47 minutes of regional news per day</td>
<td>S4C produced 5678 hours of originations in 2006, 2003 of which were in Welsh</td>
<td>11% local news and traffic / travel</td>
<td>The Cardiff Post holds 100% Welsh News, with a large proportion being Cardiff focused. Both the South Wales Echo and Western Mail give more focus to Wales-wide news and some national content</td>
<td>70% of WalesOnline content is Wales specific, likewise 43% of Thisissouthwales content is also Wales specific</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CARDIFF FOCUSSED CONTENT</th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
<td>Only Cardiff Radio community station is completely dedicated to Cardiff only</td>
<td>The Cardiff Post is entirely Cardiff focused while the South Wales Echo is predominantly focused on Wales</td>
<td>6% of WalesOnline content is Cardiff focused</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOTAL CARDIFF TARGETED ADVERTISING</th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>REDACTED</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CARDIFF SOURCED ADVERTISING</th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td>REDACTED</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: OFCOM, Oliver & Ohlbaum Analysis
There has been a noticeable increase in the volume of basic news content and the volume of classifieds...
CONTENT PROVISION
Newspapers – South Wales Echo editorial

…there has been little change in the mix of editorial content in the South Wales Echo over the last few years…

South Wales Echo: editorial content by story genre, 2003 and 2007

- There is an evenly distributed genre mix in the South Wales Echo and this has stayed consistent over the two periods
- The majority of editorial content is made up of news and local information and events listings

Source: South Wales Echo, Oliver & Ohlbaum Analysis
...the Western Mail is dominated by editorial content and contains more self promotion than display advertising....

- The Western Mail is dedicated to editorial content with basic news making up 75% of this

- Display advertising is a very small part of the Western Mail. Together display, classifieds and self promotion make up just over 10% of the content of the paper
(CONTENT PROVISION
Newspapers - Western Mail editorial

…News and Sport take up a large proportion of the editorial content while Politics takes up the smallest…

**Western Mail: editorial content by story genre, 2009**

- The small proportion of editorial content taken up by politics and business correlates with the small proportion of higher level investigative journalism
- News and sport make up the largest proportion of editorial content for the Western Mail

Source: Western Mail, Oliver & Ohlbaum Analysis
...editorial content has increased while the volume of classifieds have decreased sharply over the 6 years, display advertising still takes up a similar proportion of content but the paper itself has decreased quite radically in size...

Cardiff Post: total book content by type, 2003

Cardiff Post: total book content by type, 2009*

*Motors classified advertising moved from the main paper to a 'Motor Wales' supplement

Source: Cardiff Post, Oliver & Ohlbaum Analysis
CONTENT PROVISION
Newspapers – Cardiff Post

…News content has doubled and Politics content has been introduced to the paper in the last 6 years…

Cardiff Post: editorial content by story genre, 2003 and 2009

- The overall genre mix is broadly consistent over the two periods
- Significant changes have been the removal of all cultural news and the insertion of political stories. This is explained by a new piece called ‘Constituency Notes’
- News content has increased two fold to now take up 43% of editorial content

Source: Cardiff Post, Oliver & Ohlbaum Analysis
CONTENT PROVISION
Websites by type

…there are 51 websites focused on providing local content and classified advertising to the Cardiff region…

Number of Cardiff focused websites providing local content by type, March 2009

Source: Oliver & Ohlbaum Analysis
CONTENT PROVISION
Websites by type

…there are 51 websites focused on providing local content and classified advertising to the Cardiff region…

Number of Cardiff focused websites providing local content by type, March 2009

Source: Oliver & Ohlbaum Analysis
CONTENT PROVISION
Localness of website content

…the main websites focusing on news provision in Cardiff and South Wales cover a wide range of stories and issues from across the region and some UK wide – however, Cardiff focused stories are under represented…

Wales Online and This is South Wales: website editorial content by story locality, March 2009

- Both websites are very much regionally focused though both give some representation of UK wide stories and issues
- Cardiff focused stories and issues are under represented
- Most Welsh focused content is based on the South Wales region, which makes up about 2/3 of the total Welsh population

Source: Get Surrey website, Surrey Life website, Oliver & Ohlbaum Analysis
CONTENT PROVISION
Localness of website advertisement content

…the main websites focusing on news provision in Cardiff and South Wales under represent local advertising with main focus on national and regional advertising…

Wales Online and This is South Wales: website advertisement content by locality, March 2009

- Wales Online has a much higher regional advertising than This is South Wales
- This is South Wales has quite an even split between national and regional advertising, whereas Wales Online carries 75% regional and local advertising, and 25% national advertising

Source: Wales Online website, This is South Wales website, Oliver & Ohlbaum Analysis
PAISLEY

Summary

…radio and TV in Scotland has a wider regional focus whilst some local press seems to dominate the supply of local (Glasgow) content …

<table>
<thead>
<tr>
<th>LOCAL CONTENT</th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>STV broadcasts local split bulletins within the evening news programmes. These last 5 minutes</td>
<td>11% local news and traffic / travel</td>
<td>The Daily Record is a region wide newspaper whilst the Glasgow Evening Times and the Glaswegian are more local (Glasgow) focused</td>
<td>40% of the editorial content on eveningtimes.co.uk is 40%</td>
</tr>
<tr>
<td>GLASGOW FOCUSSED CONTENT</td>
<td>NONE</td>
<td>Only Sunny Govan, the community radio station, is completely dedicated to Glasgow – more specifically the Govan area of Glasgow</td>
<td>The Glaswegian has 69% local (Glasgow) content and no national content</td>
<td>SEE ABOVE</td>
</tr>
<tr>
<td>TOTAL GLASGOW TARGETED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td>REDACTED</td>
</tr>
<tr>
<td>GLASGOW SOURCED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td>REDACTED</td>
</tr>
</tbody>
</table>

Source: OFCOM, Oliver & Ohlbaum
…the Paisley Daily Express has remained fairly consistent in its content supply by type, a noticeable change has been the large increase in property advertising (both in display and classified)…


<table>
<thead>
<tr>
<th>Proportion of content by type</th>
<th>TOTAL COLUMN INCHES = 1704</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPINION, EDITORIAL &amp; FEATURES</td>
<td>9%</td>
</tr>
<tr>
<td>PROPERTY</td>
<td>25%</td>
</tr>
<tr>
<td>BASIC NEWS</td>
<td>91%</td>
</tr>
<tr>
<td>OTHER</td>
<td>100%</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Proportion of content by type</th>
<th>TOTAL COLUMN INCHES = 1898</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPINION, EDITORIAL &amp; FEATURES</td>
<td>10%</td>
</tr>
<tr>
<td>PROPERTY</td>
<td>70%</td>
</tr>
<tr>
<td>BASIC NEWS</td>
<td>90%</td>
</tr>
<tr>
<td>OTHER</td>
<td>30%</td>
</tr>
</tbody>
</table>

Source: Paisley Daily Express, Oliver & Ohlbaum
…News content has decreased significantly whilst Info/Events reporting has increased…

- News content went from 50% of total editorial content to only 36% of editorial content during the two periods.
- Info/Events content has increased from 11% to 28% of total editorial content.

Source: Paisley Daily Express, Oliver & Ohlbaum
CONTENT PROVISION
Newspapers – Glasgow Evening Times

...investigative journalism has decreased to 1% of the newspaper and there is no property advertising in the 2007 paper...

Glasgow Evening Times: total book content by type, 2003

Glasgow Evening Times: total book content by type, 2007

Source: Glasgow Evening Times, Oliver & Ohlbaum
CONTENT PROVISION
Newspapers - Glasgow Evening Times editorial

…the genre mix of editorial content has remained fairly consistent…


- Culture reporting has been introduced to the newspaper, though this is such a small percentage that it could be a one-off feature
- Noticeable change can be seen in the decrease of Other editorial content

Source: Glasgow Evening Times, Oliver & Ohlbaum
...majority of the book content is editorial, in 2003 there was a small percentage of classifieds and none in 2007...
...apart from the exclusion of Culture focused content in 2007 there are no noticeable changes in the genre mix of editorial content...

Daily Record: editorial content by story genre, 2003 & 2007

- Other content has increased from 17% of editorial content to 28%
- In both years News and Sports reporting make up the largest proportion of the editorial content
CONTENT PROVISION
Websites by type

…there are 45 websites focused on providing local content and classified advertising to the Glasgow area…

Number of Glasgow focused websites providing local content by type, April 2009

Number of websites

Source: Oliver & Ohlbaum
CONTENT PROVISION
Websites by type

...there are 45 websites focused on providing local content and classified advertising to the Glasgow area...

Number of Glasgow focused websites providing local content by type, April 2009

Number of websites

<table>
<thead>
<tr>
<th>Category</th>
<th>Websites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Council Information</td>
<td>3</td>
</tr>
<tr>
<td>Local Issues &amp; Campaigns</td>
<td>2</td>
</tr>
<tr>
<td>Local Information</td>
<td>3</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>4</td>
</tr>
<tr>
<td>Classifieds</td>
<td>2</td>
</tr>
<tr>
<td>Directories</td>
<td>6</td>
</tr>
<tr>
<td>Newspapers</td>
<td>5</td>
</tr>
<tr>
<td>Radio</td>
<td>8</td>
</tr>
<tr>
<td>Education</td>
<td>2</td>
</tr>
<tr>
<td>Sports</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: Oliver & Ohlbaum
Daily Record and Evening News: website editorial content by story locality, March 2009

- The Daily Record’s website carries 60% of UK wide and international editorial content
- Conversely, the Evening Times’ website carries 60% of local and wider regional focused editorial content

Source: Daily Record, Evening News, Oliver & Ohlbaum
…the Glasgow Evening Times does not carry any wider regional advertising content…

Daily Record and Evening News: website advertisement content by locality, March 2009

- Similar to its editorial content, the Daily Record’s website carries mainly UK wide advertising content
- The Evening Times’ website holds 67% worth of local, Glasgow focused advertisements

Source: Daily Record, Evening News, Oliver & Ohlbaum
Belfast is served by a variety of media outlets which seem to have a strong regional content focus. ITV1 broadcasts 47 minutes of regional news per day. 11% local news and traffic/travel. Andersonstown News produces at least 67% of local content. There are 23 websites focused on providing local content to Belfast. Citybeat is strongly Belfast focused. Raidió Fáilte, the community station, is completely dedicated to Belfast. While Andersonstown is strongly Belfast focused in its content, the other two titles give a stronger weighting to regional Northern Ireland news content. The table below summarizes the content focus of different media outlets.

<table>
<thead>
<tr>
<th>LOCAL CONTENT</th>
<th>TV</th>
<th>RADIO</th>
<th>PRESS</th>
<th>WEB</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ITV1 broadcasts 47 minutes of regional news per day</td>
<td>11% local news and traffic/travel</td>
<td>Andersonstown News produces at least 67% of local content</td>
<td>There are 23 websites focused on providing local content to Belfast</td>
</tr>
<tr>
<td>BELFAST FOCUSED CONTENT</td>
<td>NONE</td>
<td>Citybeat is strongly Belfast focused. Raidió Fáilte, the community station, is completely dedicated to Belfast</td>
<td>While Andersonstown is strongly Belfast focused in its content, the other two titles give a stronger weighting to regional Northern Ireland news content</td>
<td>SEE ABOVE</td>
</tr>
<tr>
<td>TOTAL BELFAST TARGETED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BELFAST SOURCED ADVERTISING</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: OFCOM, Oliver & Ohlbaum
…from 2003 to 2007 Andersonstown has had a clear reduction in classified and display advertising with Motors and Jobs classifieds disappearing in the 2007 paper…

Source: Andersonstown News, Oliver & Ohlbaum
...Sports content has doubled while business reporting has been dropped...

Andersonstown News: editorial content by story genre, 2003 and 2007

- Sports content increased by 16% while Info/events has fallen by 13%
- Business reporting no longer makes up part of the editorial content of the paper
- Otherwise the content by genre mix has stayed fairly consistent over the 4 years

Source: Andersonstown News, Oliver & Ohlbaum
…since 2003 advertising content has fallen slightly while opinion, editorial and feature pages have increased and a small proportion of investigative journalism has been introduced…

Belfast Telegraph: total book content by type, 2003

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Proportion of Content by Type %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic News</td>
<td>89%</td>
</tr>
<tr>
<td>Opinion, Editorial &amp; Features</td>
<td>11%</td>
</tr>
<tr>
<td>Motors</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>92%</td>
</tr>
</tbody>
</table>

Total Column Inches = 4874

Belfast Telegraph: total book content by type, 2007

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Proportion of Content by Type %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investigative</td>
<td>3%</td>
</tr>
<tr>
<td>Opinion, Editorial &amp; Features</td>
<td>27%</td>
</tr>
<tr>
<td>Motors</td>
<td>48%</td>
</tr>
<tr>
<td>Other</td>
<td>100%</td>
</tr>
</tbody>
</table>

Total Column Inches = 3329

Source: Belfast Telegraph, Oliver & Ohlbaum
CONTENT PROVISION
Newspapers - Belfast Telegraph editorial

…News content has decreased significantly while Political editorial content and Other have increased…

Belfast Telegraph: editorial content by story genre, 2003 and 2007

- News content decreased by 15% in 4 years
- Politics has increased by 8%, though the most significant increase has been the 16% increase in Other editorial content
- The increase in Other editorial content can be explained by the rise in opinion and feature pages from 2003 to 2007

Source: Belfast Telegraph, Oliver & Ohlbaum
the Irish News has remained fairly consistent in content supply by type from 2003 to 2007…


Source: Irish News, Oliver & Ohlbaum
CONTENT PROVISION
Newspapers – Irish News

...content by genre in the Irish News has remained fairly consistent over time...


- The genre split of editorial content has stayed fairly consistent over the two periods
- The most significant change has been a 12% increase in Info/Events content

Source: Irish News, Oliver & Ohlbaum
CONTENT PROVISION
Websites by type

...there are 23 websites focused on providing local content and classified advertising to the Belfast region...

Number of Belfast focused websites providing local content by type, April 2009

<table>
<thead>
<tr>
<th>Type</th>
<th>Number of Websites</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCAL COUNCIL INFORMATION</td>
<td>2</td>
</tr>
<tr>
<td>LOCAL ISSUES &amp; CAMPAIGNS</td>
<td>1</td>
</tr>
<tr>
<td>LOCAL INFORMATION</td>
<td>6</td>
</tr>
<tr>
<td>ARTS &amp; CULTURE</td>
<td>1</td>
</tr>
<tr>
<td>CLASSIFIEDS</td>
<td>1</td>
</tr>
<tr>
<td>DIRECTORIES</td>
<td>1</td>
</tr>
<tr>
<td>NEWSPAPERS</td>
<td>1</td>
</tr>
<tr>
<td>RADIO</td>
<td>4</td>
</tr>
</tbody>
</table>

Sites owned by traditional offline media

Source: Oliver & Ohlbaum
CONTENT PROVISION
Websites by type

...most websites targeting Belfast are commercially focussed...

Number of Belfast focussed websites providing local content by type, April 2009

Number of websites

<table>
<thead>
<tr>
<th>Category</th>
<th>Non commercially focused sites</th>
<th>Commercial sites</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCAL COUNCIL INFORMATION</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>LOCAL ISSUES &amp; CAMPAIGNS</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>LOCAL INFORMATION</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>ARTS &amp; CULTURE</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>CLASSIFIEDS</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>DIRECTORIES</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>NEWSPAPERS</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>RADIO</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Oliver & Ohlbaum
…the main websites focusing on news provision in Belfast have a strong regional and UK wide/international content focus…

IrishNews and BelfastTelegraph: website editorial content by story locality, April 2009

- Despite being Belfast based news providers they both give more weighting to regional (other Irish), UK wide and international editorial content.
- Irishnews.com is more Northern Ireland focussed with 66% of editorial content being local or regional based, as opposed to belfasttelegraph.co.uk which only has 47% of regional and local content.

Source: Irish News website, Belfast Telegraph website, Oliver & Ohlbaum
CONTENT PROVISION
Localness of website advertisement content

…this pattern is also seen in the advertising content on both websites…

IrishNews and BelfastTelegraph: website advertising content by locality, April 2009

- The irishnews.com does not offer Belfast specific advertising
- 22% of advertising on the belfasttelegraph.co.uk is Belfast specific

Source: IrishNews and BelfastTelegraph, Oliver & Ohlbaum