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The innovation challenge for the South African newspaper sector

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The innovation challenge for the South African newspaper sector

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Wits Business School

Sculpting global leaders

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ABSTRACT

This is an inquiry into what the South African newspaper sector is doing to obviate challenges brought about by innovations that have disrupted the speed, platform and frequency of reader engagements.

While the general challenges, including rapid loss of readers, faced by newspapers are known, what is not known is what innovations, if any, are introduced by the South African editors in order to remain relevant.

I used the Sectoral Systems of Innovation framework to look at how the sector generates knowledge, how it learns, competes, co-operates and diffuses its innovations. I conducted semi-structured interviews with selected experts - editors and media innovation scholars - in three of the four main newspaper houses in South Africa.

Key findings include that there is a palpable sense of hopelessness about the expected demise of the printed newspaper. Editors acknowledge the centrality of the readers to their innovation attempts, but these remain largely ignored.

I also found that processes used by various media houses to introduce innovations are archaic and random.

KEY WORD Innovation; Newspapers; Sectoral Systems of Innovation; Digitisation; Editors; Social media; Strategy; Internet

DECLARATION

I, Makhudu Sefara, declare that this dissertation is my own unaided work except as indicated in the references and acknowledgements. It is submitted in partial fulfilment of the requirements for the degree of Master of Management in the field of Innovation Studies at the Wits Business School in the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in this or any other University.

Signature: ……..

On this 28th day of March 2018

_____

MAKHUDU SEFARA

DEDICATION

It sometimes just takes listening to your voice on the other side of the phone for everything to start making sense again. Other times it's just a simple look at your beautiful but matured face. No words are enough to thank you not merely for being a good mother, as sons do their moms, but for the tenacity of your spirit, your *botho* and many lessons your life represent.

Thank you for teaching us that striving for excellence is not striving for machine-like perfection. Thank you for teaching us to embrace our flaws without wallowing in our inabilities. Thank you for teaching us that a belief in science and modern ways of being does not negate the importance of faith. Thank you for your life struggles for in them lies many lessons for our lives.

I dedicate this work to you, Mashiko Sefara, ngwana Lucia, an African girl child, for all the good you represent. For your positive attitude to life, your humanity and showing abundant love even to those who disrespected you.

Much love and blessings.

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This work would not have been possible if it was not for many people in my life. My office support team. My keepers. My sisters. Primrose Sindane and Eulender Mudau.

I wish to acknowledge my supervisor Dr Diran Soumonni for his faith, patience, tutelage and, importantly, a beautiful mind that he is. Even when this appeared too daunting a task, his calm demeanour and insistence for me to “breathe” and focus one thing at a time!

I have many friends and acquaintances with whom rigorous, intellectual debates were had about innovation and the state of the newsrooms in South Africa and around the globe.

I acknowledge all those who provided assistance, support and encouragement, especially the rowdy but hardworking and fun-loving bunch that were my classmates. Lastly, the love and support from my family who endured my prolonged absence from home but who never gave up on me even when I felt the mission close to impossible.

LIST OF ABBREVIATIONS

ABC – Audit Bureau of Circulation

AR – Augmented Reality

BRICS – Brasil, Russia, India and South Africa

IOL – Independent Online

PRC – Publishers Research Council

SABC – South African Broadcasting Corporation

SANEF – South African National Editors Forum

SAPA – South African Press Association

SIS – Sectoral Innovation System

WAN – World Association of Newspapers

Chapter 1: INTRODUCTION

1.1 PURPOSE OF THE STUDY

The intersection between innovation and journalism - more specifically - how innovation has impacted newspapers - is important and interesting for many reasons.

This intersection is not just another classic chapter of mutations brought about by technological advancement. It is, broadly, about how the advancement of technology enables more inclusive participation in democracy and socio-economic developments.

Research on innovation-journalism has, for the most part, centred around the emergence of new gadgets and or platforms which have displaced – or are in the process of displacing – old forms of content delivery by newspapers. The new forms encourage engagement rather than the old formats of uni-directional communication. In addition, the new forms have empowered the reader to also become a writer.

At conception, the challenge appears to be of platforms, engagement and instantaneousness. Or is it? Is this a simple case of old forms making way for new and dynamic platforms? Are editors misguided in directing their innovation efforts at finding new platforms? Will the discovery of new platforms by newspapers obviate the challenges they face today - or are the challenges bigger?

As technology changes how people communicate and communication platforms become ubiquitous, the battle for people's attention by brands, more broadly but newspapers more specifically, has become even more intense.

This is an inquiry into what South African newspaper editors - in three major newspaper groups - are doing to introduce new innovations in the face of disruptions brought about by the impact of technology on the newspaper sector.

1.2 The South African Media Landscape

According to Daniels (2014), there are four main newspaper houses in South Africa. These are Media24, Independent Newspapers, Caxton and Times Media Group, which has now become Tiso Blackstar. The newspaper house that owns the reputable investigative newspaper, The Mail & Guardian, remains small regardless of its title punching above its weight. A notable addition is The New Age, recently renamed afrovoice, which was recently bought by Lodidox from Gupta-owned firm Oakbay Investments. While a new member of the sector, this too is a small operation.

In Broadcasting, the South African Broadcasting Cooperation (SABC) is a behemoth whose influence has spawned many battles among a myriad interest groups. It is the biggest news operation in the country with four television stations (including a 24-hour news channel) and 19 radio stations. Naspers, the owners of Media24, is the second biggest and has grown phenomenally in the last few years through the launch of a myriad channels targeted at different audiences. It is also the parent company of Media24, which operates Afrikaans and English newspapers in addition to the successful online platform News24.

Primedia offers a bouquet of commercial radio stations which include Talk Radio 702 and 947 as flagship radio stations. Power FM, owned by MSG Afrika which also owns Limpopo-based radio Capricorn FM, is a fairly new radio station which has added a new dynamic to talk radio in South Africa's commercial capital. Other notables include Sabibo's eTV and 24-hour news channel eNCA while Lodidox's 24-hour news television channel ANN7's – now known as Afro Worldview - future remained unclear following a decision by Multichoice to not renew a contract allowing the controversial station to continue operating on the DStv bouquet.

The media landscape in South Africa includes a strong Internet and social media presence. According to South Africa Mobile 2017 (Effective Measure, 2017), about 70 percent of South Africans browse the web using smartphones, while 44 percent surf the web while still in bed and 35 percent reach out for their phones as soon as they wake up. The report states that the most popular uses for the phone includes WhatsApp (83%), calls (59%), SMS (51%), web surfing (40%), Facebook Messenger (40%).

According to Goldstuck (2017), there are 21 million Internet users in South Africa while users in the world are estimated at one billion - 60 million of which are in China. Facebook remains the most popular Social Media tool for South Africans and stands at 14 million users. YouTube is the second biggest at 8.7 million users followed by Twitter at 7.7 million users. The latter has dropped from its previous second position owing to slow growth. LinkedIn has 6.1 million users while Instagram is at 3.8 million.

According to the World Press Trends 2017 which is published by the World Association of Newspapers (WAN), 2,7 billion people read print newspapers in 2016 (the latest available statistics). This represents a five percent increase on the back of growth in India and some parts of Asia with declines in the US and Europe.

In South Africa, PwC released a forecast report on the future of newspapers called "PwC Entertainment and Media Outlook: 2016–2020 (South Africa – Nigeria – Kenya). The report notes that in 2020, the newspaper market in South Africa is expected to be R1 billion smaller than in 2015. In 2015, newspaper revenue stood at R9.1 billion. The report further states that digital advertising was expected to reach R576m in 2020 - which represents an 13.7% increase, this will be insufficient to completely counteract the declines in print advertising.

According to the Audit Bureau of Circulation (ABC) in South Africa, shows that total daily newspaper First Quarter (January to March) circulation decreased from 1 763 756 in 2012 to 1 332 320 in 2017 - marking a 24 percent decline for the same corresponding period. The weekend newspapers suffered even more serious declines from 2 440 109 to 1 626 226 in the same period. This represents a 33.3 percent decline.

The increased access to the Internet, rapidly-increasing access to social media platforms, a proliferation of radio stations and 24-hour television news stations has not only changed the media's gatekeeping role and its position in society as the primary sense-maker of critical information/news, it has, it essence, irrevocably changed the newspaper sector in a way that has hitherto not been seen (Roberts, 2005; Hobday, 2005; Daniels, 2014; Jos and Finneman, 2017; Spyridou et al. (2013); Zolkepli and Kamarulzaman, 2015; Internet Trends, 2017).

1.3 CONTEXT OF THE STUDY

In the last two decades, researchers have commented on how digitisation, automation and robot-journalism have, in essence, irrevocably changed the newspaper sector (Dickel and Scrape, 2017; O'Sullivan, Fortunati, Taipale, Barnhurst, 2017; McCollough, Crowell & Napoli, 2015; Zolkepli and Kamarulzaman, 2015).

Simons (2017) notes that while the business model for newspapers in the last century appeared relatively simple, the onset of online dissemination platforms has changed the game. In the past, the model was such that newspapers increased audiences by providing captivating news content and then sold the attention of those readers to advertisers. Simons observe that the media houses now earn online a fraction of what they earned from newspapers or television or radio broadcasts.

The respected magazine The Economist ran a story on the cover of its August 26, 2006 edition, asking, rather tellingly: "Who killed the newspaper?". From this headline, it is clear there is no question about whether newspapers will survive or not. The question is not if but who has killed the industry.

Three years later (in 2009), the Christian Science Monitor and Seattle Post-Intelligencer gained world-acclaim for shutting down their presses - announcing they would now only provide online versions (Clark, 2009). For many in the media, questions abounded on whether the demise was digitally-induced or simply a consequence of poor navigation of a rapidly-changing news environment by newspaper managers.

But soon reverse migration set in as publications that are configured for the web started printing and publishing - sending conventional wisdom on a tailspin. After closing down the print version in 2012, Newsweek announced that its focus solely online was a mission impossible. The experiment had failed - so it launched a weekly print version in March 2014. Before long, it became a profitable operation (Doctor, 2014, Husni, 2015). This was soon followed by technology website CNET, ALLRecipes, Pitchfork, Politico, Tablet and WebMD (Blair, 2014). The reverse migration was in full swing.

O'Sullivan et al. note this reverse migration highlights something often not spoken about - a "growing porousness and complementarity between print and new media

forms". This suggests a whole new ecology and eschews the dominant narrative of cannibilisation of print by digital which has hitherto been considered common sense.

1.4 Digital-Analogue Binary

O'Sullival et al. also note that digital technologies used by newspapers existed long before the onset of online news. This, however, runs counter to arguments made by Mierzejewska; Yim; Napoli; and Al-Hasan (2017) who argue that the newspaper industry "hastened its own decline (at least in terms of its circulation decline) via the establishment of free online versions of their printed product".

O'Sullivan et al. make the point that there exists a body of research which show that digital does what print does differently, not better. Therefore, they argue, there is no basis to conclude that the world will only be digital and newspapers will cease to exist.

Milosevic and Henriksson (2014) state that overall news consumption show that newspapers remain, by far, reliable means of news information compared to online. They quote the World Association of Newspapers and News Publishers (WAN-IFRA) reports which show that newspaper circulation was increasing slowly, at 2 percent, from 2012 to 2014 with stable revenue ($163 billion) and readership (2.5 billion adults).

Further, the much-celebrated digital readership still stands at one third (800 million Internet users - which now stands at one billion) of print newspaper readership (2.4 billion, and 93% of newspaper revenue comes from print, which is predicted to be a source of income for many years (Milosevic and Henriksson, 2014). They quote Alessandro Ludovico (2012) who notes the "emerging media ecology will not be defined by a digital and analogue binary" but rather a "hybridisation" of platforms to form the post digital.

O'Sullivan et al. argue that newspapers continue to initiate new innovations, improve on these innovations and also benefit from innovations by others. Observations, they say, of newspapers show them to be vividly adaptable organisms which do "not fit the caricature of fatally afflicted relics" - which is commonplace.

In Africa, there is emergent content on innovation and citizen journalism research but media freedom remains a dominant topic Mabweazara (2010); Nassanga (2008); Banda (2010); Daniels (2014). Mabweazara focuses on the use of the Internet, email and mobile phones by journalists in Africa as “new” technology on which focus is “limited and fragmented”. Mabweazara notes that research on these new technologies is treated as if it is disconnected to the broader communication space and has no impact on journalism.

His topic, while dealing with innovation and journalism, is a tad shy of the actual impact these technologies have had on the business models of newspapers and how editors were dealing with these. Banda also notes how the journalism landscape on the African continent is changing to accommodate the use of technology but, he too, does not veer into how the use of technology in Africa is rendering newspapers relics or how the performance of newspapers (measured in terms of newspapers sold and profits made) was either assisted or inhibited by technological advancement.

Pasti and Ramaprasad (2016), who studied digitisations and journalists in the BRICS countries Brasil, Russia, India, China and South Africa, found that digital-only journalism was most prevalent in major cities like Cape Town and Johannesburg. Pasti and Ramaprasad note that this form of journalism was slow to take off in SA in an industry whose “main currency is credibility and trust,” because online was viewed suspiciously by those who felt it lacked traditional journalistic values. Online journalism started taking off after 2000 but this was changing given a proliferation of new sites like Daily Maverick, Health-e News, Politics Web, Moneyweb, Groundup, Daily Maverick and Rand Daily Mail.

At the heart of it all is that newspapers, given the changing media landscape, need to design a new relationship with readers (Barnhurst, 2016). Fortunati and Vincent (2014) say that audiences are now more writers than they are readers - turning on its head the unidirectional communication medium of the past. The audience’ proclivity to read and write means a rethink by newspapers of the space allocated to “readers” is overdue.

1.5 RESEARCH PROBLEM

Technology has unleashed changes that have reconfigured the media ecosystem in a manner not experienced before but one that, importantly, threatens the continued existence of the newspaper sector.

Literature on newspapers and innovation not only generally acknowledges challenges faced by the sector, but goes further to say the business model of the newspaper sector appears fatally afflicted (Akenson, 2009; Singer, 2011; Domingos, 2015; Linden, 2016; Simons, 2017).

While challenges faced by newspapers in the Global North appear similar to those in the Global South, there are important contextual differences. Newspaper circulation is generally on the decline in the West while, in the South, newspapers targeted at the poor and those published in languages other than English, are relatively able to retain readers and, in some cases, are experiencing reader increases.

In the specific case of South African newspapers, the challenges faced by the sector appear even more pronounced. A significant number of researchers focused on the fact that the industry is in decline - but not what the industry is - or ought to be - doing to stem the decline.

Peer-reviewed research points to a brighter digital future (Thurman et. al, 2017; Gicheru 2014) but is not specific about how this future could be attained. Gicheru's research points to the South African newspaper sector as one of the most advanced on the African continent. The challenge though is that innovations emanating from South African newspapers are scant. And so is research on the innovation-newspaper nexus in South Africa.

Gicheru, like Esipisu and Kariithi (2011) before her, recommend convergence of old methods with technology and increased attention to ways of improving profitability. But it remains unclear how this too could be realised.

To properly understand the sector's proclivity to innovate, it is suggested that a study of two of the three constituent parts (Knowledge and Technology; and Actors and Networks) of the Sectoral Innovation System (SIS) must be conducted on the English newspapers in South Africa.

Of interest in this study are the key drivers of innovation in SA newspapers, factors impeded or help firms to innovate, and various relationships between the actors and networks in the sector. Without an understanding of these, newspapers will, as predicted by The Economist magazine, perish and or whither into perpetual irrelevance.

1.6 Research Questions

The following are suggested:

1.6.1 In the wake of technologically-induced disruptions in the newspaper sector, are South African newspaper editors introducing innovations to obviate an apparent crisis of relevance? If so, how do they go about it? What are the factors that encourage or inhibit innovation?

1.6.2 Rapid advancement in technology has enabled firms and service organisations to use analytics and algorithms to improve customer relationships. What are the types of actors that newspaper editors interact with to improve competitiveness? Does the newspaper sector involve readers, considered key actors in the news ecosystem, in the search for solutions to disruptions occasioned by rapid technological changes? And what is the nature of these interactions?

1.7 SIGNIFICANCE OF THE STUDY

The study has the potential to help editors and newspaper owners reflect on factors that encourage or discourage innovation in the sector. It may lead to the development of a more coherent approach to knowledge management and learning in the industry so that other key players don't waste time re-inventing the wheel at a time of disruption and rapid changes to business models that have been in place for centuries.

The study is significant because it may help the industry develop a new relationship with its customers as it sorts out the interconnections between various actors - including employees and universities, for example.

The study will be significant and relevant to the South African National Editors' Forum Sanef), Media Workers Association of South Africa (MWASA), media owners, journalism researchers, innovation scholars, journalists in general and readers of newspapers.

1.8 DELIMITATIONS OF THE STUDY

It is not the scope of this study to establish the exact nature of the losses suffered as a consequence of the emergence of digital technology in newspapers more forcefully in the last two decades. This study is also not an explanatory note on what journalism is (Deuze, 2005) or what online newspapers are about (Boczkowski, 2002). This is not a quantitative study - so we will not be dealing with formulae and number calculations - even though numbers are incidental to the study - behind the revenue and circulation declines.

There are about 15 major newspaper titles in Gauteng (Johannesburg, Tshwane and Ekurhuleni). Given the limited number of editors, the study was focused on six editors and several media scholars versed with innovation challenges for newspapers specifically and the media in general.

It is not the intention of this study to use all elements of the SIS as explained by Malerba (2002; 2004), Mani (2006), Malerba and Nelson (2007), Malerba and Mani (2009). Malerba (2002; 2004) explains that it is the variable of interest that determines the focus of a study.

1.9 ASSUMPTIONS

In this study, it is assumed that editors, as people worried and applying their minds to the erosion of the bottom lines of their newspapers, are constantly appraising themselves with the facts about causes and sources of declines in revenue and circulation.

It is further assumed that this is not, for them at least, guess work as it is for much of society. It is assumed they will be able to explain how - based on what - they attribute the declines in profits and sales to new platforms and why this is not attributable to bad journalism, for example.

1.10 THEORETICAL AND CONCEPTUAL FRAMEWORK

1.10.1 The concept of an innovation system

Systems in innovation underscore the centrality of the flow of technology and useful information between firms, institutions and people to the process of innovation. According to Schumpeter (1942), persistent differences in how various economies develop can be explained through systems of innovation. These entail iterative interaction of technology, institutions, information and people.

Freeman (1987) described National Innovation System (NIS) as “the network of institutions in the public and private sectors whose activities and interactions initiate, import, modify and diffuse new technologies”.

Niosi et al. (1993) says “a national system of innovation is the system of interacting private and public firms (either large or small), universities, and government agencies aiming at the production of science and technology within national borders”

Viotti (2002) argues that NIS exists only in countries that originate new to the world innovations and these are to be found in the economic Global North. For Viotti, less-developed countries are, at best, engaged in incremental innovation and diffusion but, for the most part, these are focused on learning from the developed countries and could therefore not be considered innovative in the true sense of the word.

Lundvall (1988, 2001) and Gu and Lundvall (2006a) argue that the broader definition of innovation systems - while criticised for imprecision - is much more helpful,

especially in countries of the Global South. The critical element is that all broad factors taken into consideration ultimately impact the “learning and competence-building”.

Lundvall et al. (2009) say the broader definition includes small countries like Sweden, Norway, Denmark and Finland into countries considered innovative. The narrow definition implies that only the US, Japan, France, United Kingdom and Germany qualify as the top innovators. They contend that this analysis of NIS is flawed and ought to be rejected.

Freeman (1995) argues that the rate of technical change depended more on “efficient diffusion” than an ability to be the first to introduce radical innovations. Explaining secondary innovation and made-in China strategy, Wu et al. (2009) say that acquisition of foreign technology is but the start of a process by latecomer firms to transition “from duplicative imitation to endogenous innovation”.

Lee (2013) says localizing knowledge creation is an important component of Schumpeterian catch-up tactics used by countries of the East. Lee says that the low knowledge base of latecomer firms keeps them pre-occupied with “learning” for long when the key is to target short-cycle technologies. Korea and Taiwan, observes Lee, achieved technological diversification by “moving into shorter-and-shorter cycle technologies” even though they did not set out specifically to target a certain fixed list of short-cycle technologies at the beginning.

1.10.2 Theoretical foundation

The initial set of scholars who looked at sectoral innovation systems were, for the most part, pre-occupied with how major changes came about in industries. Utterback (1994) and Klepper (1996) were focused more on life cycles of various industries. Or, to put it differently, their evolution.

This is also an area about which Metcalfe (1998) wrote his seminal piece about evolutionary economics and creative destruction (Also see Malerba, 2002; Fagerberg, 2004). Later on, scholars focused on the competitive advantage firms received by paying attention to transaction cost and game theory (Malerba and

Orsenigo, 1996) while agency theory focuses on carrot and stick (incentives and control).

There are different types of innovation systems. The types of systems include the National Innovation Systems (NIS), Regional Innovation Systems (RIS), Sectoral Innovation Systems (SIS) and Clusters. For purposes of this study, the (SIS) is of primary concern.

1.10.3 Sectoral Innovation Systems

According to Malerba (2002), a sectoral system is “a set of new and established products for specific uses and the set of agents carrying out market and non-market interactions for the creation, production and sale of those products”.

A sectoral system has four main components or dimensions, according to Malerba (2002), Mani (2006), Malerba and Nelson (2007), Malerba and Mani (2009). These include Knowledge and technology; Key actors; Networks; and Institutions. The four are sometimes whittled down to three - with key actors and networks compressed into one (Malerba and Nelson 2007).

In the earlier version (Malerba 2002), the Market or Demand was identified as a dimension - affected by external forces (customer demand).

1.10.3.1 Knowledge and Technology

While sources of technological capabilities will differ from sector to sector (Freeman, 1982; Rosenberg (1982), the newspaper industry has been affected by a proliferation of social media applications and other web-based platforms which make news and information not only instantly available, but ubiquitous. This study focuses attention on the new forms of technology being acquired or developed by the sector to keep ahead. These are crucial because they affect the firms’ capabilities, technological change and the firm’s successful performance (Malerba and Nelson, 2007).

1.10.3.2 Key Actors and Networks

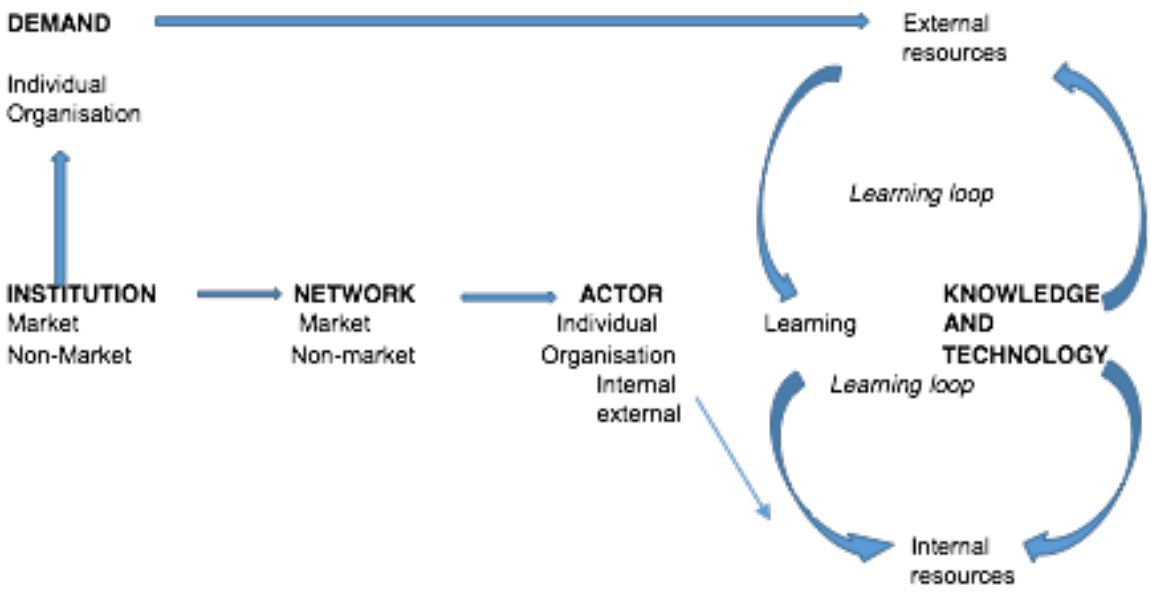

FIGURE 1: An illustration of Franco Malerba's Sectoral Innovation System framework

Malerba and Nelson (2007) identify firms as key actors in catch-up, noting the importance of the firm's key capabilities and learning. Other actors, depending on the sector under consideration, could be users, customers, upstream suppliers, financial organizations, universities and the public sector. In this study, readers as key users, become a primary focus.

1.10.3.3 Institutions

These are institutions that set norms and standards like the Press Ombudsman whose office ensures compliance by the sector to agreed upon codes of conduct and rules. For purposes of this study, focus was limited to the first two constituent parts of the SIS which excludes this part.

1.10.4 Managing Innovation at the Firm Level

The history of all economics is, for all intents and purposes, the history of the firm. Firms are involved in competition with each other on various levels. They rely, for the most part, on their capabilities to get ahead.

They generate new products, services or processes to outperform each other while, at the same time, imitating the competences of their most capable counter-

parts with a view to displacing them in the marketplace (Schumpeter 1934; Christensen 2013; Christensen, Dillon, Hall and Duncan, 2016; Porter, 1990, 1995; and Malerba 2002).

Metcalfe (1998) says economic change is evolutionary. To understand this evolution, Metcalfe says we must look at coherent patterns of change at sectoral levels and how innovation (Porter, 1990) plays a central role. It is the microeconomics of change (Metcalfe, 1998) arising from competition between different business activities (Malerba (2002), Mani (2006), Malerba and Nelson (2007), Malerba and Mani (2009) that is important to study.

Companies compete by introducing their new ideas whose success depended on their diffusion and or general use or adoption (Metcalfe). He emphasises that competition - a progenitor of economic change – is about the creation of conditions that encourage diverse behaviour by firms, much less the number of firms.

According to Malikane (2014), African firms operate in extremely challenging environments. Indirect inputs like lack of electricity by the state impede their ability to grow, which, in turn impedes their ability to export goods outside their immediate environments. Their poor performance limits their access to credit which, in turn, keeps the firms in what Malikane terms a “vicious cycle of stagnation”.

Teece and Pisano (1994) look at the dynamic capability of firms in Schumpeterian terms (See also Teece, 2007). They say while firms compete on the basis of product design, quality, process efficiency and other attributes, it is equally important to note that firms are engaged in endless creative destruction behaviour. This means they are constantly trying to find ‘new combinations’ in order to get ahead while rivals are always seeking to improve their competences or “to imitate the competence of their most qualified competitors”. And this drives Schumpeter’s creative destruction.

Metcalfe (1998) quotes Schumpeter (1934) who, in The Theory of Economic Development, observes that it is through innovation that firms command a decisive cost or quality advantage affecting not merely their marginal profits but their very existence.

This goes to the heart of Schumpeter’s Creative Destruction.

Schumpeter Mark I refers to Creative Destruction, which denotes that old ideas, products or processes make way for new ones as firms or countries innovate. Old ideas become outdated and subsequently die and new ones come into being.

Mark II denotes a process of Creative Accumulation which refers to the capability within well-established firms or industrialised countries to improve earlier innovations in order to ensure continued business success. The difference here is that instead of old ideas dying, there is an accumulation as a result of improvements to products and or processes.

To properly understand why certain economies perform better than others, it is important we look at the behaviour of firms that constitute industries or sectors.

Malerba (2002; 2004) posits that firms drive innovation and production. Malerba says a sectoral innovation approach pays attention to the process of generating, producing and diffusing innovations. Malerba says the sectoral innovation approach could flexibly focus on the firm's learning and capabilities, research and development, strategies, structure, knowledge and technologies that characterize the sector, links and interdependencies with related sectors. To attain international success (Porter, 1990), firms must sacrifice the temptation to cut corners and merely survive.

Other areas, Malerba notes, that one could focus on include the role of actors like competitors, suppliers, users, universities, financial organisations, characteristics of demand, and type of institutions (standards, regulations and norms).

While Malerba acknowledges that the aforementioned is broad, he notes that the level of aggregation necessary for a particular study of a sector will be determined by the aim of that study. When analysing various agents, Malerba posits, one must be flexible. The analysis sought to be done (the variable to be examined) determines the level. It could, for example, be focused on the firm's sub-units, a group of firms, non-firm organizations, or individuals.

Malerba and Nelson's (2007) study of factors affecting catch-up in six different sectoral systems in several countries shows the importance of sectoral analysis. Naturally, different sectors exhibited different traits. They observe that these included differences in type of industry structure, to the role of multinationals, networking,

demand, university and public research laboratories, finance, government policies, regulation and standards, and to co-evolutionary processes.

Augier and Teece (2009) focus on the men and women behind the firms. They say it does not matter if the market structure of an economy is competitive - the creation of viable firms, and thus sectors, will fail if that economy is incapable of producing managers and entrepreneurs with the wherewithal to respond to technological and market changes. And therein lies the challenge for newspaper owners and managers.

Further, Augier and Teece (2009) note that firms that excellently make wrong innovations will fail while companies that generate mediocre innovations desired by people will survive - even if just for a short while. This rings closer to Christensen's (2016) "Job's to be Done" theory of Innovation in his book - Competing Against Luck.

Christensen says understanding the "customer need" and what the service being provided by the firm helps the customer to resolve in their life is important because it "helps us in making innovation predictable".

While the Jobs to be Done theory appears too general, it is also very relevant in the newspaper industry. For, it may force a rethink of the industry's approach to service. We revert to this later.

Yamamoto et al. (2017) recommend future research to look at possibilities of doing in-depth interviews with newspaper editors to deepen understanding of the impact of innovations like social networking on traditional journalism.

1.11 CONCEPTUAL FRAMEWORK

It has now been established through Malerba that Sectoral Innovation Systems (SIS) can be used to determine an industry's proclivity to innovate, the constituent

dimensions of the SIS and also how management of innovation at the firm-level is

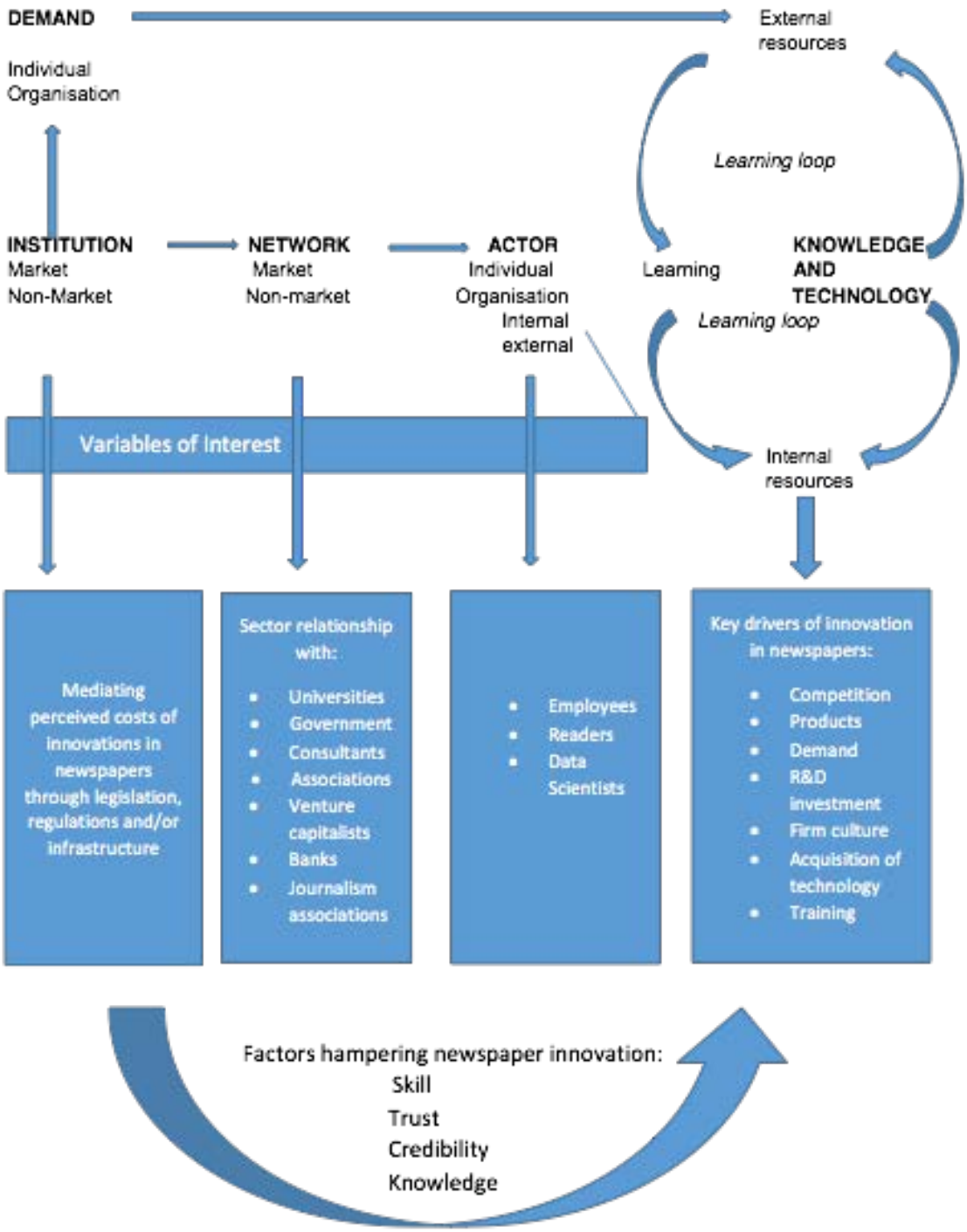

FIGURE 2: This is a conceptual framework showing how the various dimensions of the Malerba's Sectoral Innovation System (SIS) will be operationalised.

crucial not just for the firm or the sector, but for economies.

Figure 2 above is an adaptation of Malerba's SIS framework. The variables of interest for this study include key drivers of innovation for the newspaper sector. This will help shine a spotlight at how those who manage innovation in the newspaper sector approach competition, firm innovation culture, new product development and acquisition of new technologies, for example.

Conceptually, it is critical to explore what changes have been occasioned by digitisation in South African newspapers - especially in the light of the attention economy of which Simon (1996) writes (See also Hansen and Haas, 2001). Of particular interest is whether or not newspapers think it's important to take advantage of digitisation and machine learning to not only know more about their readers but to use them to co-create content relevant for them.

In this study, a thematic approach was used to operationalise the framework. Once Knowledge and Technology challenges was the first area of focus dealt with. Focus was then moved to networks and relationships, another important pillar in Malerba's SIS. The idea was to look at how the sector relates to universities, government, consultants, banks and venture capitalists. The latter is key given the much talked about concerns about the costs of innovation, especially radical innovations.

What anchors the conceptual framework are the intangibles that could inhibit innovation in a sector.

Malerba (2002) says sectoral systems could be used in various ways including development of public policy proposals; determining factors impacting firm performance and competitiveness, and descriptive analysis of sectors. This study was restricted to factors affecting newspaper innovation and thus performance.

Malerba and Nelson (2007) assert that a firm's ability to learn, improve competences, its beliefs, goals and expectations are heavily impacted by the specific sector it is in. It's important to understand how these are being addressed by various newspapers.

1.12 DEFINITION OF KEY TERMS

Algorithms are simply a sequence of instructions telling a computer what to do (Domingos, 2015)

Automation refers to the reliance by the media houses on computer systems or machinery that rely less on journalists or human interaction in the process of producing news information (Van Dalen, 2012).

Circulation is a number of units a newspaper sells per determined frequency (Mitchell, Gottfried, Barthel and Shearer, 2016).

Digitisation in this study refers to the conversion or switch from using old methods of news writing, production and dissemination to digital forms reliant on computers (Holley, 2009)

Editors are content managers of media houses - in this case - newspapers - who are entrusted with the daily decision-making related to the selection of the newspaper content mix, writing, editing, dissemination of their products and innovation (Deuze, 2005).

Journalism refers to an age-old craft of writing news and analysis for newspapers, online or broadcast media (Deuze, 2005; 2017)

Social media refers to any of several web applications which offer users opportunities to post text, images and audiovisual material (Khamis, Ang and Welling, 2017) (See also Deuze, 2017). Examples include Facebook, Twitter, WhatsApp, Instagram, SnapChat, YouTube and others (Good, 2012).

1.13 OUTLINE AND STRUCTURE OF THE REPORT

A brief description of what is included in each chapter

Chapter 1: Introduction

This chapter explains the significance of the research, its delimitations and provides a framework within which it is conducted. This chapter also includes the theoretical and conceptual frameworks

Chapter 2: Literature Review

We look at what other scholars have written on the important issue of the intersection between innovation and journalism. Has the advancement of technology condemned newspapers to a slow death?

Chapter 3: Research Methodology

In this chapter, we explain the research strategy and design. We explain the Interpretivist paradigm, the Simple Interpretive Study, Unit of analysis and how we choose our in-depth interview participants.

Chapter 4: Presentation of Findings/Results

In this chapter, I present the findings from the interviews had with senior editors and media and innovation scholars. The main focus areas are in terms of the Sectoral Innovation System. These are Knowledge generation and learning; Technology, Process and Culture; Actors and Networks (importance and use of readers in innovation); Competition; Cooperation

Chapter 5: Analysis and Discussion of the Research Findings

A distillation of peer-reviewed literature showed there was scant and dated quality research on the topic. This study showed that most editors were groping in the dark on subjects they needed to be experts on. An analysis of the findings showed that the processes used by the sector were archaic and random. Readers are also identified by editors as key stakeholders yet the results show the sector mostly ignores readers.

Chapter 6: Conclusions and Recommendations

In this chapter, I tabulate major findings, key conclusions of the study and conclude with suggestions for future research. Recommendations for the newspaper sector contained herein include that the sector must appoint innovation champions rather than assume digital editors are innovation champions.

1.14 CONCLUSION

The purpose of this study is to look into how the newspaper sector in South Africa is responding to the global challenge of digitisation in the context of specific South African challenges.

Peer-reviewed literature and data shows that countries of the Global North are, according to World Association of Newspapers, experiencing a steady decline and market confusion. The latter relates to how some newspaper managers misapplied themselves to the challenge and prematurely shut down print operations and focused solely on online offerings only to reverse these decisions and start making profit from printed news offerings in a short period.

Even when this is so, it is clear that the on-set of digital will change irrevocably, the media landscape, especially the newspaper operating environment. It is the particularities of the impact of digitisation and the response of newspaper houses that are missing from the discourse. It is lazy for editors to unscientifically attribute - without establishing either causality or correlation - circulation and revenue losses to digitisation. An inconvenient dialogue with editors on this is due.

The study is significant not just to editors, journalists and media owners but consumers of newspapers, among others, and society at large.

Chapter 2: LITERATURE REVIEW

2.1 INTRODUCTION

What will the media ecosystem of the future look like? Has the dawn of the digital age spawned the demise of newspapers? According to Mierzejewska (2017), newspapers are not only becoming an endangered species, the newspaper industry is complicit in its own demise. Its provision of free online versions of its printed newspapers - a tactic meant to help reduce declining circulation - has had the opposite effect.

Åkenson (2009) notes that newspaper publishing and the newspaper industry have relied on production and distribution methods that have not changed for hundreds of years until now. Digitisation has now turned everything on its head.

Lewis (2012) identifies scarcity, exclusivity and control as the pillars on which the business models and professional routines of journalism rested and indeed made twentieth century media enterprises hugely successful.

Uni-directional forms of 20th century journalism are also making way for conversational news reporting (Singer, 2011). Spyridou et al. (2013) observe that old journalism characterised by reliance on same sources is making way to an era of multiplicity of sources and information sharing.

But this view runs counter to what O'Sullivan, Fortunati, Taipale, and Barnhurst (2017) believe. O'Sullivan et al. say that digital technologies used by newspapers go back many years**.** According to Van Dalen (2012), reporters have an unexplainable fear of automation and can also be said to suffer automation anxiety (Akst, 2013).

But Van Dalen does not understand why this must be so because, he posits, journalists have been working with machines and automation (Pavlik, 2000) for years. Computers used for broadcasting, for example, use algorithms.

An algorithm is a sequence of instructions telling a computer what to do (Domingos, 2015) and, notes Van Dalen, many broadcast journalists have been working with

these for years. Consequently, he does not understand why they fear that automation could lead to a jobs' bloodbath.

Linden (2006) asks a rhetorical question and then proceeds with a counter-argument. Why would there be so many jobs still in journalism if newsroom automation was killing jobs? Linden (2006) argues that creative jobs such as journalism are at low or no risk because of automation. Linden adds that journalism as ideology, understanding how journalists give meaning to their work (Deuze, 2005), probably will be a strong mitigating effect in the future. He says journalists work in a complex environment influenced by many and varied, if not opposing, influences.

Following the declaration of the death of newspapers by the Economist magazine in 2006, the World Association of Newspapers - and News Publishers (WAN-IFRA) has claimed that newspaper consumption is increasing (Milosevic and Henriksson, 2014).

O'Sullivan et al. (2017) argue that what appears a premature celebration of the demise of newspapers is premised on seeming uncritical celebration of disruption and not on the real facts. Journalism, notes Pavlik (2000), has for centuries been shaped by the adaptation of new technology. Linden (2016); Sylvie Weiss, 2012) agree that the journalist-machine interface is nothing new and should neither be feared nor distrusted (Van Dalen, 2012). Linden adds that older research on computer-anxiety among journalists (Shipman, 1986), one must question what is new.

Boczkowski (2005) concurs - noting that the unexplained technophobia has been a regular factor in journalism for years.

Simons (2017), however, paints a dark picture for the future of jobs in journalism. Simons says while a quantitative exercise could show that a number of jobs have been disappearing, these job losses are due, in part, to changing consumer behaviour and media business models. The link to automation remains unclear. She goes on to say, contrary to Linden (2006), that technology has brought the news and advertising businesses to their knees. What she doesn't say, however, is that the changing consumer behaviour is more prevalent in the Global North than it is in the South.

While there seems to be a decline in newspaper reading patterns in countries of the Global North, newspaper circulation is increasing in the Global South - creating a near-equilibrium (Milosevic and Henriksson, 2014).

South Africa seems to embody global patterns, with major newspapers experiencing a decline in circulation while newspapers focused on the poor - or which publish in languages other than English - have either maintained their circulation or seen some kind of growth.

Is the decline in newspaper circulation attributable to the rise in digital platforms and the increased use of automation in newsrooms? Or is the link assumed?

Flavián and Gurrea (2009) researched factors that attract readers to buy newspapers or use digital platforms and the substitutability of the two channels. They found that respondents read newspapers in order to search for specific information and or to get updated news. Other reasons include for leisure reading or because reading is their habit.

Flavián and Gurrea (2009) further found that readers prefer to use the digital channel (web, cell phones, apps) to search for updated news and also that reading as entertainment or as habit led readers to consider both channels as ‘substitutable’. Flavián and Gurrea (2009) implored the newspaper industry to recognise the distinguishing features or attributes that make the newspaper still attractive to readers. They found that both channels could survive alongside one another - avoiding cannibalistic effects.
Could it be that the current pre-occupation with how digitisation has rendered newspapers relics is an oversimplification?

Quantitative studies in Europe by Mitchell, Gottfried, Barthel and Shearer (2016) show that print reading overlaps with online reading. Their work contradicts the repeated mantra of cannibalisation of print by digital.

O’Sullivan et al. (2017) report this thus: 22.4% of Europeans were frequent readers only of print newspapers, while just 4.4% were frequent readers only of online newspapers.

Technology has indeed made it easier for media owners and digital platform owners to share content speedily and enable increased engagement. But so too has it enabled readers to no longer rely on media owners to get published.

Technology has also enabled media owners to find out what content today's readers are interested in. O'Sullivan et al. reckon that one of the appropriate responses by the news industry must be to invest more not in technologies but people – journalists and audiences.

They suggest a two-pronged approach for newspaper owners going forward: investing in people (journalists) and also in research on content trends. They contrast this with investments in technologies - which they say is what the majority are doing anyway. In order to take full advantage of the digital and re-imagine a new business model for print, they posit, publishers ought to research the changing nature of news and its production.

2.2 Computational journalism and Machine Learning

Anderson (2012) observes that computational journalism - as he sees it - is impacted and shaped by about five factors. Technology is but part of these. Deuze (2017) considered a possible future for digital journalism by studying 21 start-ups in 11 countries spread over five continents and concluded that the future of journalism is digital and hopeful. Deuze however did not provide much detail about how this future will look like or, more specifically, how what he terms, legacy news media, could transition successfully (circulation and profit) to this hopeful digital future.

Thurman et al. (2017) say such a digital future may bring financial benefits to news organizations although not, in the short term, to the workers who are likely to be replaced.

Gicheru (2014) quotes Kieran Baker, media consultant at Bloomberg responsible for Africa Projects, saying data management tops the list of challenges that digital media presents to newspapers in sub-Saharan Africa.

Gicheru (2014) also quotes Dr George Ogola, senior lecturer in journalism at the school of journalism and digital communication, University of Central Lancashire,

attributes the challenges to lack of audience research data. Ogola decries what could be termed “groping-in-the-dark” type of operation occasioned by lack of data. He says data could be gleaned from both the old and new forms of media platforms. He says media houses could rely on machine learning to detect reader interest, implied behaviour and use the data for targeted advertising. This links well with what Gicheru says about using convergence in pursuit of profitability.

Christin (2017) says the adoption of analytics programs like Chartbeat in newsrooms marked a radical departure from ethnographies of the print era. Then, she postulates, newspapers disregarded readers opinion letters and focused, instead, on writing that was relevant to their friends Gans (1979) (see also Spyridou et al. (2013), colleagues and even themselves. Analytics programs like Chartbeat have introduced new, radical but interesting dynamics in newsrooms with journalists randomly predicting news article popularity (Anderson, 2011a; Christin, 2014; Petre, 2015).

Anderson (2012) says newsroom sense-making technologies are of a hybrid nature: they exhibit both ‘human intentionality and material obduracy’. Thurman et al. (2017) say that a part of society may welcome automated journalism for its benefits which may include increased depth, immediacy and specificity while others may resent it for making it difficult for them to decipher what’s important in a world of information and news ubiquity. Lewis (2012) says journalism has, for years, arrogated to itself the role of making sense of information and modernity (Hartley 1996; see also Zelizer 2004a) and now this is being usurped by digital media which allows everybody to disseminate whatever makes sense to them.

Carlson (2015) though believes it is our very humanity that journalism needs to tap into to survive. Carlson observes that there is no algorithm for humanity. A journalism that reflects people as human beings, as ‘flawed, complicated, emotional’ - not programmable numbers, will be great. To Carlson’s list, Duarte (2017) adds intangibles like trust, credibility, ethics to a list that arguably must include reputation and emotional connection to brands as non-algorithmic requirements for commercial success.

Christin (2017) concludes with an observation about excitement generated by what algorithms can and should do to change things. Christin notes the description of

algorithms as ‘revolutionary’ (Cukier and Mayer-Schönberger, 2013), but cautions that this was both prescriptive and descriptive. Christin cautions against rhetoric associated with algorithms to make the point that they are not a panacea for everything and that - where attention is had on the actual and not the aspirational – journalists will discover that there will always be a role because of what certain tasks that only humans can perform – for now! And therein lies the hope for those who fear newsroom automation, robot journalism or digitisation.

2.3 The Attention Economy

The need to acquire and then hold on to someone’s attention is as old as communication itself. Given the advent of technology, business models in advertising, marketing and media are changing in line with how people direct their attention or have their attention re-directed through different forms of communications. While the advent of the Internet has made information ubiquitous, what brands, including newspapers, are short of is attention.

Simon (1996) says when the world becomes information rich, attention becomes scarce. And so the need to use and or harness that attention (Hansen and Haas, 2001) becomes great. Rotfeld (2006) says advertising clutter and declining audience attention are made worse by repeated, unexciting messages which then drive away from media houses those whose attention advertisers need.

Hanna, Rohm and Crittenden (2011) say consumers - generally - are no longer passive recipients of messages. Lately they are, according to Berthon, Pitt, McCarthy and Kates (2007), active participants in “co-creating” the adverts they wish to see and even the products they desire for themselves. The point of interest for this study is how this is manifesting in South African newspapers. Simpson (2017) says consumers are powerful influencers. To build brand reputations and personal relationships with audiences, Simpson says public relations practitioners must increasingly pay attention to word-of-mouth communication.

Simpson says that brands traditionally relied on the news stories and opinions of journalists in traditional media to tell potential clients how great their products were (Pollack 2013). Simpson says such a strong focus to impress and attract journalists neglect the fact that they are not the only influencers and, through digitisation, the

brands' consumers (Vincx, 2015) could play the same advocacy role previously played by journalists. When brands rely on consumers to spread the word, it creates a sense of empowered and satisfied consumers.

2.3.1 Attention Economy: Broadcasting, Online, Books and Magazines

This emasculation of the media is further explained by Khamis, Ang and Welling's (2017) study of the micro-celebrity creation and self-branding encouraged by the rise of social media platforms.

They quote Good (2012) who notes that self-mediation - the creation of a highly curated view of how users of these platforms wish to come across to audiences - was possible even before the advent of the Internet. Photo albums were there long before Instagram and Facebook is an online version of old scrapbooks - with the difference being the speed and scale of sharing.

Khamis, Ang, and Welling say self-mediation allows ordinary people to generate fans and assume celebrity status through dissemination of content relevant to audiences. These then lend their own brands to firms in return for payment and, in this way, completely cut out the media. The ease of self-branding and financial rewards fuel the notion that anyone can be famous without first getting attention from the media and be paid for it. And if this was so, so too could brands instigate product popularity outside traditional media platforms.

Jacoby et al. (1974) conducted a ground-breaking study which showed that the quality of decision-making was impacted by the time available to the consumer and the information about a brand (information load). They found that the provision of too much information - information overload - about brands reduced the quality of decision-making about those brands. Edmunds and Morris (2000), Eppler and Mengis (2004) confirm that cognitive processes are impacted by information overload in a variety of fields including science, marketing and accounting.

Building on this, Persson (2017) says information gets manipulated by brands to ease decision-making. Persson quotes Losee (1988) who observes that sorting out email communication and any other form of communication "that are of interest from those that probably aren't" improves the quality of decisions made by potential customers on what to buy.

In the US, Webster (1986) documents a history of fragmentation and polarization in US television audiences. Webster (2005) says audiences which were once dominated by three major cable networks (NBC, CBS and ABC), experienced gradual erosion of audience power largely due to increased channels available to audiences which then makes audiences smaller for the many channels.

2.4 The African Context

In Africa, Paterson (2013) says that the availability of extensive and thorough-going research into the connections between “African journalism” and “social media” was “nascent”. Paterson notes that much of the research is based on participatory journalism.

Berger (1999)’s research focused on changes in the South African media with a specific focus on ownership, staffing, race, gender and class.

While Berger observes and comments on changes in the media, his research is more focused on what one can term the political underpinnings of change in the media and little is said about technology-infused changes to media operations. He mentions in his conclusions the fact that - in 1999 - there’s a growing clamour for entertainment than classical journalism but, importantly, Africa’s march toward technological convergence is in full swing.

Berger quotes former Sunday Times editor Ken Owen who attributes the decline in newspaper circulation to the profit-orientation of media companies which he claims fails to invest in quality journalism.

Gicheru (2014) looks at the factors affecting the growth of so-called independent media, specifically private-owned newspapers, in sub-Saharan Africa. Gicheru observes that traditional media remains the preferred source in sub-Saharan Africa. While traditional media is preferred, the introduction of media platform innovations is impeded by a number factors. These range from language exclusions, inhibitive telephony costs, Internet availability and political interference in editorial management of the news.

Gicheru’s research is important and comes close to my research interest. She focuses on challenges faced by African newspapers - while this research is focused

on innovation implications for specifically South African newspapers. Her research is based on questions to 15 (out of 20 who responded) editors, policy makers and media scholars.

Explaining some of the challenges, Gicheru states that while Kenya's media comes across as being robust, great dangers to freedom of expression loom. The very existence of criminal libel and defamation legislation and the refusal to entrench free expression in legislation means that there is no legislative guidance but dependence on what those in power are willing to tolerate.

Gicheru observes that while the laws in Rwanda permit freedom of expression, there is a great deal of self-censorship which she links to the media's complicity in the 1994 genocide in the country.

She says that editorial independence – especially where it relates to advertisers – is one of the biggest challenges facing newspapers. She cites Safaricom**,** Kenya Revenue Authority, Kenya Power Company or the East African Breweries as some major advertisers about whom nothing bad is reported. Accordingly, economic pressures weigh heavily against freedom of speech.

Gicheru cites a 2013 study conducted in 12 African countries by Indra de Lanerolle in which he cautions against uncritical assumptions that digital disruptions to media operations in the Global North will have similar effects in sub-Saharan Africa. She says mobile wireless may also be succeeding not of their own effort but because of journalism channel failures on the continent.

Gicheru observes that the media industry in Africa bar Nigeria, South Africa and Ghana is too fragmented and individual titles or companies do not have resources to conduct quality journalism research. She quotes past director of school of communication studies at the University of Ghana Professor Audrey Gadzekpo describing newspaper industries in several African countries as "cottage industries" whose structure militates against its survival.

Gicheru concludes her research with a paragraph that links well with this research with regard not only to the conceptualisation of the challenges but also an area of further research. She says media houses on the continent must learn from the new media technologies introduced in the West. She says African media houses must

avoid a one size fits all mentality and tailor-make solutions to specific country dynamics.

On technology usage in Africa, Gicheru says the industry must integrate old ways but pay attention to what could improve profitability. Therein lies the rub. Without this profitability, there's no industry to speak of.

Esipisu and Kariithi (2011) identify challenges facing the media in sub-Saharan Africa in three main categories. The first is the largely free, professional South African media battling with convergence. The second is what is found in countries like Zimbabwe, Equitorial Guinea and Eritrea who are shameless in how they curtail media freedom. The third is countries where security for journalists is a major concern like in Somalia, Central African Republic, Nigeria, Burundi and the Democratic Republic of Congo (DRC). While not worse off than the Middle East and Latin America, the risks impede a realisation of important socio-economic rights. They make the point that while governments inhibit the development of a free, thriving media, Internet access is also relatively limited.

Like Gicheru, Esipisu and Kariithi's research makes reference to the limiting impact of Internet access, but fall short of a full discussion on what editors - newspaper editors specifically, are doing to respond to platform and process innovations threatening their bottom line. One of the most comprehensive books on challenges faced by the media, broadly, on the African continent is born of a conference hosted in Kampala.

Styled - Doing Digital Media In Africa - Prospects, Promises and Problems - it is edited by Francis Mdlongwa (2009), who observes in the editor's note that digital media is progressively gnawing away at the old media - whose model relied heavily on "selling eyeballs" to the advertising industry.

Mdlongwa says the continued existence of newspapers, television stations and radio businesses is made worse by the fact that technology now allows advertisers to access audiences without a reliance on these media houses. He observes that the survival or newspapers, television and radio stations were threatened by advertisers who by-pass them to reach audiences directly.

Berger (2009) writes about the changing media ecosystem and what Africa needs to know. He writes that while there's a "yawning divide" between Africa and developed countries, this should not lull anyone into inaction until there's a crisis of relevance.

Otieno (2009) says that the late arrival of mobile media presents two streams of opportunities for African media houses. The first is to build an emotional connection with audience while the second is to explore new revenue streams based on new technologies. He acknowledges though that it might take a while to achieve this.

He goes on to warn that levels of illiteracy, language barriers, widespread poverty in Africa and additional costs (for data and apps) militate against the opportunities spawned by new technology.

Duarte (2009) warns the media companies to be attuned to great brand management and marketing, noting that the battle for what he calls "attention economics" has just gotten underway.

Duarte explains that it is the intangibles that are beyond imitation that the newspaper industry must lean on more heavily for commercial success. While content was king in the past, the intangibles which include Ethics, Reputation, Authenticity, and Trust, have become the queens of the digital age.

This paper explores the possibility that some newspapers are not investing sufficiently in their most priced resources - journalists and content - and, where these poor decisions affect performance, they blame everything on the rise of digital. Granted, the rise of the digital age has impacted the industry - but does the sector know the extent?

Elsewhere in the world, enterprising print journalism is used to engineer reverse migration - from online to paper. After closing down its print version in 2012, Newsweek magazine declared an exclusive focus on online a failed experiment by launching a weekly print version in March 2014. The print publication made profits in a short period (Doctor, 2014, Husni, 2015).

Spyridou et al. (2013) says beyond factors related to journalistic culture, different organizational agendas putting emphasis on economic motives behind innovation

or genuine commitment to fostering openness and participation (Vujnovic et al., 2010) lead to the emergence of hybrid models between traditional top-down journalism and journalism 2.0.

2.5 Summary

It is apparent from peer-reviewed literature that there is limited research into how journalism, broadly, is impacted by innovation, much less what the sector is doing to ensure continued relevance and existence.

There appears to be a confluence of thought that much of the decline in newspaper sales is as a result of new innovations in the forms of delivery. Technology is indeed an important factor.

But an even more important factor are the actions taken by the newspaper sector to either embrace the technology and improve relations with readers or put up a fight back strategy.

Of interest in this study are strategies employed by the sector to tackle challenges brought about by innovations that have made news and information ubiquitous – to the detriment of the newspaper houses.
More to O'Sullivan's point that newspapers are involved in reciprocal innovation rather than a battle of elimination between "old" newspapers and "new" digital technologies - Merrin (2014) notes that newspapers were involved in re-invention which includes foregrounding some positives or strengths even as technological convergence becomes trite.

In any case, each media platform and each news organization need to have distinct strategies in order to produce relevant and value-creating journalism.

2.6 PROPOSITIONS - STATEMENT OF HYPOTHESIS

From the peer-reviewed literature, it is evident that the newspaper sector is facing a major crisis threatening its continued existence. Newspapers are no longer the primary sense makers of information in society. Innovation has turned readers into publishers.

2.6.1 I hypothesise that the newspaper sector is very much aware of its challenges - but remains at sea on what to do to remain relevant.

2.6.2 Knowing the challenges is one thing, doing nothing and waiting for death is another. I hypothesise that much of the industry, especially in South Africa, is not actively engaged in solution-seeking exercises.

2.6.3 There may be some who believe that their operations – in poverty-stricken Africa - are unlikely to amount to anything and so they sit and hope for solutions out of the Silicon Valley.

2.6.4 I also hypothesise that I will battle to find a newspaper that, given the financial woes besetting the sector, has appointed an innovation champion (or a team) whose primary focus is to drive the search for new solutions.

2.6.5 It is also very likely that where there are innovation activities in the sector, these are, to a large degree, haphazard.

2.6.6 While analytics and algorithms may be in use in some newsrooms, I venture that these newsrooms are simply applying the technology rather than experimenting with it with a view to customising it for the South African market.

2.7 RESEARCH QUESTIONS

2.7.1 In the wake of technologically-induced disruptions in the newspaper sector, are South African newspaper editors introducing innovations to obviate an apparent crisis of relevance? If so, how do they go about it? What are the factors that encourage or inhibit innovation?

2.7.2 Rapid advancement in technology has enabled firms and service organisations to use analytics and algorithms to improve customer relationships. What are the types of actors that newspaper editors interact with to improve competitiveness? Does the newspaper sector involve readers, considered key actors in the news ecosystem, in the search for solutions to disruptions occasioned by rapid technological changes? And what is the nature of these interactions?

CHAPTER 3: RESEARCH STRATEGY AND METHODOLOGY

3.1 INTRODUCTION

3.1.1 Interpretivist

The paradigm adopted for this enquiry is interpretivist, also referred to as Interpretivism Research Philosophy. Ponterotto (2005); Kuhn (1977); Olsen, Lodwick and Dunlop (1992) describe a paradigm as a system of interrelated assumptions, values, scientific or academic ideas that guide the researcher in the selection of tools, instruments and methods to use in research. (Also see Mackenzie and Knipe, 2006).

3.1.2 Relevant assumptions of the paradigm

Collins (2010) states that interpretivism is an approach that rejects the objectivist view that meaning resides within the world independently of consciousness but rather that access to “reality (given or socially constructed) is only through social constructions such as language, consciousness, shared meanings and instruments”.

Interpretivist paradigm is located within the broader philosophical family that includes idealism, constructivism, phenomenology and hermeneutics. They all reject objectivism. At its heart is the belief that reality is socially constructed and relies largely on interviews and observations as approaches for data collection.

In this study, there are complex, internal issues that relate to how the newspaper sector operates which were investigated. This required the researcher to be interactive with subject experts (interviewees/participants) when dealing with the nature of the complexities in their work environment (ontology) and the subjective knowledge (epistemology) they shared.

Rossman and Rallis (2003) note that it is through long, in-depth interviews that researchers can extract “deeper understanding” and meaning. They add that “the skilful interviewer asks for elaboration and concrete examples; these can elicit the detailed narratives that make qualitative enquiry rich”. Further, the questions required that more time was spent with an interviewee/participant to extract as much information as it was possible.

3.2 RESEARCH STRATEGY AND DESIGN:

3.2.1 Simple Interpretive Study and its appropriateness

This is a Simple Interpretive Study. The basis for choosing this is that knowledge of reality (ontology), in its fullness, is social and contextual (Orlikowski and Baroudi, 1991).

While interviews were used, these were in-depth. They were not strictly bounded, but Semi-structured, meaning the interviews started with questions included in the literature and allowed space for probing to elicit specific insights which could enrich understanding and elicit answers to the research question.

Rossman and Rallies (2003) say follow up questions are key because they help the interviewer to discover deeper meanings and more concrete examples. “Inviting the participant to elaborate indicates that you are truly interested in more than superficial accounts. You are interested in what the participant experiences: what he or she felt, saw, smelled, and thought about”.

Rossman and Rallis say that beginners struggle with asking follow-up questions because they can't listen to what is being said by the interviewee/participant and think of follow up questions at the same time.

At this stage, I must indicate that I worked as a journalist for over 18 years. During this period, I was a reporter, news editor, political editor and eventually edited two reputable newspapers - The Sunday Independent and The Star. I have also interviewed three former presidents, countless ministers, ambassadors, chief executives, analysts and many other prominent and ordinary people in the normal course of my work.

I state the above to support my belief that asking follow-up questions and conducting interviews are not much of a problem. I note, however, that there could be a slight difference between interviewing for a news story or feature analysis and interviewing for purposes of research.

At their core though is the need to extract as much valuable information of interest as it is possible. When deciding on the design, I have had to decide on whether this research requires depth or breadth (Rossman and Rallis) or whether it should be Prefigured or Open-ended. This study uses in-depth and open-ended questions consistent with the interpretivist paradigm.

3.2.2 Unit of Analysis

The unit of analysis for this study is the various editors and their newspapers. There are four major newspaper groups in South Africa. These are the Times Media (also known as Tiso Blackstar), Independent Newspapers, Naspers and Caxton. Collectively, they own about 90 percent of South Africa's major national and regional newspapers. Editors and editorial executives from three of the four main newspaper groups were interviewed.

The taxonomy of newspapers.

The plan though was to target the main four newspaper groups. The typology below delineates the newspapers according to their focus, whether they cater for poor, middle class or readers with higher Living Standard Measures (LSMs), the frequency of their publication and respective languages. The newspapers owned by the four newspaper groups include but the research scope may not be limited to:

NAME	FOCUS	LSM	DAILY/W'KEND	LANGUAGE
Saturday Star	General news	Mid	Daily	English
Rapport	General news	High	Weekend	Afrikaans
Weekend Post	General news	Mid	Weekend	English
Post	General news	Mid	Daily	English
Cape Times	General news	Mid	Daily	English

Daily Voice	Entertainment	Low	Daily	English
BusinessDay	Business	High	Daily	English
Daily Sun	General news	Low	Daily	English
The Sunday Times	General news	High	Weekend	English
The Sowetan	General news	Mid	Daily	English
The Times	General news	High	Daily	English
Daily Sun	General news	Low	Daily	English
Beeld	General news	Mid	Daily	
City Press	General news	Mid	Weekend	English
Sunday World	Entertainment news	Mid	Weekend	English
Sunday Sun	Entertainment news	Mid	Weekend	English
The Star	General news	High	Daily	English
The Sunday Independent	General news	High	Weekend	English
Daily Dispatch	Regional General News	Mid	Daily	English

When the newspaper sector decides to innovate, it will all start in a unit called a newspaper. Even where there's an innovation to be introduced in a group of newspapers, that innovation will find expression at one of the newspapers in the Group. This is why the editors, who sit at the coalface of innovation-newspaper interface, are important to our study.

Six newspaper editors, two academics and a newspaper manager were interviewed. Of all newspaper groups, Caxton has, quantitatively, fewer units (newspapers) to study. They also own many community-based local newspapers which are of a much smaller scale than intended in this study.

3.3 SELECTION OF PARTICIPANTS

3.3.1 Expert elicitation

Interviewing varies on how prefigured it is, how broadly applied and when it takes centre stage in a study. Patton (2002) categorises interviews into three types: informal conversational interviews, the interview guide approach, and standardised open-ended interviews. In this study, the interviews take centre stage and, as indicated earlier, are semi-structured.

Rossman and Rallis (2003) say that special considerations arise when interviewing "elites" or experts. These are individuals considered influential, prominent, or well-informed, or all three in a community and are selected on the basis of their expertise in areas relevant to the research. This approach is a perfect fit.

Rossman and Rallis (2003) offer this insight: "Valuable information can be gained from these participants because of their positions in social, political, financial, or administrative realms. Access to elite individuals, however, is often difficult because they are usually busy people operating under demanding time constraints. The researcher may have to adapt to planned-for flow of the interview based on the wishes and predilections of the person interviewed".

While time was of concern, the plan was to set up interviews as early on after approval of the research. In anticipation, given that framework questions have already been prepared, I read-up on each and every newspaper's innovations. This helped to pre-identify any visible, usable innovations from the newspapers ahead of the interview - in the event these came up during the interviews.

Rossman and Rallies (2003) note that while all in-depth interviews typically require much preparation, they warn that elite individuals are “quite savvy and may resent the restrictions of narrow or ill-phrased questions” from an ill-prepared interviewer.

Limited use of snowball sampling (Goodman, 1961), will be allowed to extend the core group of 5 editors, managers and scholars - extending this possibility to a minimum of about 08 participants. This number seem ideal given that there is no universally applicable mean sample size in qualitative interviews (Mason 2010).

Thurman et al. (2017), who did an exploratory study involving journalists, concur with the sampling size. “The results of this exploratory study should, of course, be interpreted in the light of its constraints. Firstly, the participants, although sampled purposefully to include a range of ages, skills, and professional experience, do not constitute a representative cross section of journalists. Nevertheless, their number, ten, exceeds McCracken’s guidance that for ‘many research projects based on qualitative semi-structured interviews, “eight respondents will be perfectly sufficient” (1988, 17).””

3.4 RESEARCH METHODOLOGY

A qualitative approach was used. It is an exploratory study on an emerging area of interest in innovation-journalism.

This is not a representative, randomised survey but an exploratory study focusing on interviewing a cross-section of people with specialised knowledge in journalism and innovation.

3.4.1 Data Collection and instrument

Semi-structured interviews were conducted. These were audio-recorded and later transcribed. I transcribed the audio recordings on my own.

The transcripts were coded according to various pre-selected themes in line with the SSI described earlier. I read and then re-read the transcripts several times until an interpretation of their meaning was clear.

Ovale (2007), says such hermeneutic text interpretation is an infinite process, whereas in practice it ends when a sensible coherent meaning has been reached.

Having participated in the interviews though, it did not take as much time as it would for those merely interacting with the written words the first time.

Depending on the answers provided to pre-selected questions, there were follow-up questions (DiCicco-Bloom and Crabtree, 2006). Rossman and Rallies (2003) say that a completely unbound and unorganised conversation usually ends up telling no story at all. “The interview may follow inductive lines, starting with details and then elaborating the big picture, or it may proceed deductively, moving from the gestalt to specifics”. In this case, we followed the inductive line.

Where it was not possible to meet potential interviewees, I wrote emails with specific pre-selected questions. I planned to send follow-up questions in the event some questions were not answered satisfactorily - but there was no need. Out of nine respondents, only one responded in writing while the rest were recorded interviews.

Rossman and Rallis (2003) note that research design is not cast in stone. They say a researcher’s work is influenced by what they encounter in the field and this may change from what was anticipated when the research design was decided. So, while the plan was to interview all key participants, especially because interviewing also allows us an opportunity to make observations not possible through emailed conversations, where the situation presents itself, I made the allowance, though this was not preferable, to allow those unable to avail themselves for an interview an opportunity to respond in writing.

3.4.2.1 Population / sample size:

The type of sample selected for this research is Purposive - Fit for Purpose. This is a type of non-probability sampling technique. This means the units of research, usually small, are selected based on the judgment of the researcher. I choose units of interest based on their expertise to gain insights into their environment and, specifically, to answer the research question. The type of purposive sampling I used is called Expert Sampling - which is used when a researcher seeks to glean insights/knowledge from specific people based on their expertise. The idea is not to make generalizations about populations, which procedure would require probability sampling.

The respondents were chosen based on their documented expertise in journalism and innovation. They are senior people in newsrooms grappling with journalism/innovation; academics on journalism (and people who have written extensively on journalism and innovation, and individuals who either lead or have led relevant organisations to which journalists and editors belong/affiliate. These include South African National Editors' Forum, Media Workers' Association of South Africa, the Press Council etc.

The concept of saturation (Glaser and Strauss, 1967; Morse 1995; Koeber and McMichael, 2008) was used as a guide - this is that the process of gathering information should be stopped when it reaches a point of diminishing returns. In other words, the time and resources used to find information is no longer worth the effort. The issue of saturation in research is fiercely contested. How do we know that a researcher's claim that a point of saturation is achieved is, in fact, true? Morse (1995) says researchers often claim saturation without adducing proof. Jette, Grover and Keck (2003) say that expertise in the chosen topic - in our case journalism/newspaper/innovation - can - and it did - reduce the number of participants needed in a study.

Charmaz (2006) notes that the aim of the study determines project design which directly impacts sample size. She says it could take less time - and effort, I suppose, - to reach saturation where a researcher is making modest claims.

Marshall (1996) says that qualitative researchers "often fail to understand the usefulness of studying small samples". He notes that this is predicated on the "misapprehension" that for any research to be considered of good quality, its findings must pass the generalisability test. In the end, though, Marshall says an "appropriate sample size for a qualitative study is one that answers the research question".

3.5 DATA ANALYSIS

While important, qualitative data analysis is, when one is without a transcription service software, labour intensive. Transcription is the first step in the process of analysis.

Then the transcribed text must be read, the pages cut, key words selected and relevant pieces coded after which a process of identifying patterns must get underway.

Responses collected from the interview were collated and coded for analysis.

The Framework I have chosen for the study is Exploratory rather than Explanatory.

In line with this and also my chosen Interpretivist paradigm, I used Content Analysis to extract meaning (inductively) - at different levels - from our interviews.

3.6 LIMITATIONS OF THE STUDY

Given the fact that we used purposive sampling, this came with two major disadvantages:

A) Potential researcher bias

This limitation is imposed by the nature of research design. It can become too problematic if the selection of units of study does not take consideration of the level of expertise of the subjects of research.
In this case, we have decided on the criteria (See 3.4.2.1).

B) Poor representativeness of the sample

This arises when a researcher seeks to make generalisations based on the findings. Our study is exploratory and we do not wish to make such generalisations. Of the four main newspaper groups in South Africa, the Caxton group was not included for two reasons.

Firstly, the group has one newspaper title – The Citizen – while other groups have a minimum of four different titles each. The Caxton group also publishes a significant number of community newspapers which did not form the scope of this study, as outlined in 3.2.2 (Unit of analysis). The exclusion of the group or The Citizen newspaper will not affect the generalisability or how representative the results are.

Further, Rossman and Rallis (2003) note that some of the limitations imposed by the choice of in-depth interviewing could include a lack of co-operation by potential interviewees, discomfort with answering some of the questions the researcher

wishes to explore or the interviewer may lack the requisite interviewing skills that evoke rich responses. Further, there could be different interpretations of questions asked and, worse, participants may have good reason to not be truthful with interviewer (Douglas, 1976).

3.7 ETHICAL CONSIDERATIONS

I adhered to the highest ethical principles in pursuance of this study. There were no threats of physical harm or violence. The respondents are senior editorial executives for various newspapers and two academics and a newspaper group manager. The identities of the interviewees were kept anonymous in line with the Wits policy on confidentiality in research. Of interest was their contribution to the creation of new knowledge and not who they are. The data gathered is for research purposes only.

3.8 RELIABILITY AND VALIDITY

3.8.1 Reliability

The research tools used in this study were consistent and stable. A professional recorder (with my cell phone as a backup) were used to ensure that there are no mistakes. In addition, handwritten notes were taken.

3.8.2 Validity

There are low degrees of risks to validity, which is about whether or not the instrument is measuring what we had set out to measure. External validity, which relates to generalisations, will not be applicable in this study. Internal validity, which relates to how well the study is done, will be managed appropriately.

3.9 Research Timeline

Milestone	Timeline
1. **Research report approval**	25 November 2017
2. **Interview requests**	15 November 2017 - January 30
3. **Conduct interviews**	22 February 2018 - 22 March 2018
4. **Analysis and Writing**	25 February 2018 – 28 March 2018
5. **Submission**	28 March 2018

3.10 SUMMARY

The paradigm used in this study is Interpretivist, which is part of a family of research philosophies or world view that rejects the objectivist's notions of reality. This is a Simple Interpretive Study design for which In-depth Interviews, which are semi-structured work perfectly.

Semi-structured interviews allow us to not merely gather data but also to probe further for deeper meaning - in line with Interpretivist world view that meaning is, in its fullness, a social construction.

The unit of analysis were the newspapers whose editors were interviewed. The selection of those to interview followed what is termed "Expert Elicitation" - which refers to solicitation of expert views, commentary or insights from elites or people in higher positions.

The methodology followed here was qualitative and the interviews were recorded and transcribed for analysis.

This is an exploratory study and Content Analysis was used. Co-operation of interviewees/participants was flagged as one of the biggest risks. External validity does not really apply and reliability seems to be in check.

CHAPTER 4: PRESENTATION OF FINDINGS / RESULTS

4.1 OVERVIEW

The South African newspaper sector is in the grip of a major crisis that has unleashed a mix of hopelessness and nervous excitement about a possible digital future. Major questions remain on the sustainability of profitable revenue generation online.

4.1.2 Brief introduction

Rapid changes in technology have made it possible for brands, including newspapers to develop a more meaningful, intimate knowledge of their customers in order to improve customer experience. The South African newspaper sector acknowledges it needs to be nimble-footed in how it evolves this relationship with its customers, but evidence from editors shows that the road ahead is still long and arduous.

4.1.3 Background Profile of Respondents and Process Followed

4.1.3.1 One of the senior editors at the Saturday Star

Position: Editor

Newspaper Name: Saturday Star

Previous positions: Former News Editor and reporter.

The person has been responsible for the leadership of the newspaper, its growth and profitability

4.1.3.2 One of the senior editors at The Star

Position: Editor

Newspaper Name: The Star

is the person has been responsible for the editorial leadership of The Star, which is the flagship title of Independent Newspapers.

4.1.3.3 One of the senior editors at the Sunday Times

Position: Editor

Name of Newspaper: The Sunday Times Stream.

The person has been responsible for the editorial sections that produce The Sunday Times newspaper, TimesSelect

4.1.3.4 One of the digital executives at Tiso Blackstar

Position: Group Editorial Director for Tiso Blackstar newspaper group

Previous positions: Group Digital Editor: Tiso Blackstar, Editor in Chief of News24

4.1.3.5 A journalism professor

Position: Adjunct Professor of Journalism at Wits University and SABC Board Member

Previous positions: SABC Board deputy chairperson. Former editor of Sunday Times, City Press and Deputy Head of SABC News

4.1.3.5 A media studies professor

Position: Associate Professor of Media Studies at Wits University

MA and PhD supervisor

Author of academic books on journalism

Previous position: Advocacy co-ordinator at two major newspapers

4.1.3.6 One of the executive editors at City Press

Position: Deputy Editor

Newspaper: City Press

Previous position: Investigations editor.

Responsibilities: Manage various sections of the newspaper on behalf of and in conjunction with the editor

4.1.3.7 One of the digital executives at City Press

Position: Digital Editor

Newspaper: City Press

Responsibilities: Manage City Press' digital platforms

4.1.3.8. Management executive at Tiso Blackstar

Position: Deputy Managing Director of Tiso Blackstar: Media Division

Previous Positions: Former Editor of Sunday Independent; Deputy Editor at Mail & Guardian; and Executive Editor of The Star

Responsibility: Sustainability of Newspapers

4.1.3.8 The media executive at Media24

Position: News 24 Head of Audience Development

Previous position: News24 Head of Product Management

Responsibility: Story optimisation on Media24 digital platforms with a view to increase readership

4.1.4 Summary of the process followed

I conducted face-to-face semi-structured interviews (Patton, 2002) with all the respondents but one – the digital executive at City Press. Owing to her busy schedule and time pressures on my end, she opted to answer written questions. This was one of the challenges that had been anticipated given that Rossman and Rallies (2003) had warned that special considerations arise when interviewing the busy but knowledgeable elites.

The face to face interviews seemed to work very well because where respondents either did not fully understand the questions or sought to make sure we have the same understanding were able to ask and I clarified. Further, where respondents did not answer the questions in full, or provide examples to support their averments, I was able to make follow up questions (DiCicco-Bloom and Crabtree, 2006). The respondents were also keen to get a copy of the research, with three of them saying they have never been asked to participate in research that went to the heart of the challenges facing the sector.

The interview with the Media24 executive was done telephonically and recorded. This too was effective and useful.

Once the interviews were finished, I transcribed the material - which was very time consuming. I then identified common themes from the answers. Given the questions asked, the themes evolved around the main constituent parts of the Sectoral Innovation System (SIS). These themes are explored in depth below.

At Tiso Blackstar, for example, data from the management executive at Tiso Blackstar, the digital executive at Tiso Blackstar and one of the senior editors of the Sunday Times ended up becoming repetitive and somewhat superfluous because they all referred to the same examples of innovation attempts, the same trip to the US and UK to study innovation culture, and the same responses about who they are competing against. It was at the cusp of becoming too much information yielding limited results (Morse, 1995). In total, I interviewed nine experts which is in line with Marshall (1996) who argues against generalisability requirements for qualitative research, noting that an appropriate sample size for these is one that, in the end, answers the research question. Charmaz (2006), however, states a preference for eight experts as a perfect fit for qualitative research.

4.2. PRESENTATION OF FINDINGS AND DATA RESULTS

4.2.1 Newspapers do innovate but…

CONTEXT: *Respondents were asked to comment on whether or not the newspaper sector was innovative and what evidence there was of this innovation, if at all.*

FINDING: Most of the participants in the research agreed that the sector was involved in a plethora of innovation activities. They concur, however, that the sort of innovations undertaken by the South African newspapers would not save the newspaper published in its print format. Both editors and scholars seem to be of the view that the sector must be given a break because it has shed its arrogance of believing that newspapers survived the discovery and later popularity of radio, television and that the quality it provides will compel readers to remain loyal in spite of rapid technological changes.

MOTIVATION: An executive at Media24 says News24 is doing a lot of great things on its digital platforms that were not done before. She mentions Netwerk24 as an example of Media24's innovation efforts. Netwerk24 is a digital platform that can only be accessed by subscribers. Its content is behind a paywall. She explains that initially, Media24 put content from all its Afrikaans newspapers and put it behind the wall. It has now morphed to include all content from Afrikaans magazines too. This is the first recorded paywall from a major South African newspaper house. Gridwatch, a website created to help South Africans know when and for how long their suburbs would lose electricity at the height of what was colloquially referred to as "load-shedding," was another innovative project that generated revenue for News24 at a time when electricity supply was unpredictable.

A digital executive at Tiso Blackstar, offers this insight:

"We are on a relatively strong innovation curve. Although I think we are late off the gate. For years people hoped they will be able to sweat a longer life out of your legacy (newspaper) titles. Owners paid lip service and used innovation as a hedge against the threat (of irrelevance)".

The digital executive at Tiso Blackstar points to a deliberate effort by the owners of The Sunday Times, the Sowetan, the recently canned The Times, BusinessDay, Financial Mail to create sub print brands off these titles as part of his proof of innovation. The sub brands include The Edit, a glossy magazine created off The Sunday Times; Wanted magazine which was created off Business Day and S Mag, which caters for Sowetan readers. "Ten years ago, this was not a requirement".

A senior editor at the Sunday Times, a management executive at Tiso Blackstar and the digital executive at Tiso Blackstar refer to a decision to create BusinessLive, an online subscription-based service which allows readers access to curated, premium business content as the most revolutionary innovation attempt. When a reader subscribes to BusinessLive, they get around the clock access to BusinessDay, BusinessTimes, Financial Mail and analysis from international partner publications like Financial Times, Wall Street Journal and New York Times. This is held high by the group as proof of their innovation success even though the group was yet to release statistics showing how many subscribers - readers - it had attracted to its offering.

But so convinced of its success is Tiso Blackstar that it has announced the formation of TimesSelect as a sequel to BusinessLive. The senior editor at the Sunday Times says while BusinessLive focused on readers keen on business news, TimesSelect is a daily focused on the general interest reader. “This is the newest baby in the group. TimesSelect is different. It doesn't play in the space of breaking news,” says the senior editor at the Sunday Times. The model followed is that of offering readers news that matters once a day. The digital executive at Tiso Blackstar argues that while there is too much information and news on the Internet and this is also muddied by fake news, there is a premium busy readers are willing to pay for a news company to curate only that which is the best and offer this once a day. “Alongside great journalism, there’s value in selection”.

The management executive at Tiso Blackstar opines the sector has no choice but to innovate. He argues the very fact that newspapers, in spite of prophesied death, have maintained readers is proof that there are many things being done to offer value to the reading public and engender loyalty. “All newspaper houses have come up with what I call alternative newsrooms that look at how we should capture this (evolving, reading) audience,” says the management executive at Tiso Blackstar.

The senior editor of The Star, and the senior editor at the Sunday Times agree that newspaper companies must transform themselves into media technology firms. The senior editor at The Star notes journalists are now referred to as MMRs - Multi Media Reporters. “We are moving from Digital First, Print Best mantra to Technology First approach”.

According to the senior editor of The Star, Independent Newspapers has a partnership with Sagarmatha Technologies which will help the company to innovate at rapid speed.

One of the executive editors at City Press says the paper has come up with an e-newsletter that allows it to develop a relationship with readers seven days a week rather than only on Sundays as was the case in the past.

According to a senior editor of the Saturday Star, the newspaper has introduced innovations like Augmented Reality (AR) to its readers. While every reporter on the

newspaper has to file for Twitter, Facebook and the newspaper group's website IOL (Independent Online), the reporters are also expected to make videos of the stories they file. Those who buy the paper can use their smartphones to access audiovisuals that come with stories selected to go with AR. She says this is one of her strategies to redirect readers back to the print newspaper because that remained the source of revenue for newspapers.

"We have to drive people back here (to the newspaper). This is our bread and butter. So we can't put everything online. We can't. This is what pays the bill. Not social media".

A media studies professor at Wits University says there is a lot of experimentation with paywalls and advertising done by the media some of which do not help the sector. "They do innovate, actually. Whether they innovate to the extent that is needed for them to survive is another story. Newspapers do very silly things. Advertisers are going online and this has affected newspapers. So they go partially online. They create these paywalls from which they get no revenue and they then experiment with leaky paywalls," says the media studies professor.

Most of the respondents believe that while there is innovation activity in the sector, it is insufficient. There are some who believe that the printed newspapers must be protected from complete and immediate decimation. This is evidenced by comments like "we must drive people back here (newspapers)" because this is what generated revenue. Others, however, believe that a half-hearted embrace of digital platforms is the genesis of the sector's woes. This is why the sector must now get involved in catch-up.

4.2.2 Knowledge generation and Learning

CONTEXT: *Respondents were asked to comment on how their newspapers and the sector generated current knowledge used to keep their newspapers afloat in spite of disruptions. What were the mistakes? They were also asked to comment on the process of ideation (idea generation), and if there were structures and processes to support the generation of innovations.*

FINDING: The SA newspaper sector has made several mistakes from which it derived crucial lessons. The three major groups - Media 24, Tiso Blackstar and Independent Newspapers - appear to be involved in active knowledge generation activities in order to get ahead - however late the exercises.

Some of these lessons were based on an exaggerated sense of importance of the industry and the belief that the printed newspaper will stand the test of time while, in other areas, personalities appeared to come in the way of decision-making. Knowledge generation processes are haphazard and random. There is also a lack of co-ordination that also borders on poor internal communication. This has a demotivating effect on workers.

MOTIVATION: The management executive at Tiso Blackstar says the sector generally misread competition and believed the various newspapers still competed against each other even though it was apparent that the Internet and social media had opened the floodgates of news dissemination. He says that shallow analysis and a lack of checks and balances on social media served to discredit the new media but, in the process, gave newspaper owners and editors a false sense of security of tenure for their businesses.

“We thought we were in a newspaper business, when in fact we are in Media Technology business. We arrogantly believed we are still the go-to quality people/media. We over estimated our worth”.

The management executive at Tiso Blackstar notes that Tiso Blackstar chief executive has been an enabler of progress in that in the last 12 months, he allowed members of management, some editors and the digital team to travel mainly to the United States and United Kingdom to source new knowledge and learn international best practice. He quickly points out that there was no assumption that what worked in the US and UK would work in South Africa. “We are a different market so we interrogated the ideas and assumptions behind some of the projects to check their feasibility on the African continent”.

The Media24 executive suggested that they committed many mistakes when putting together the Netwerk24 paywall. These related to how much content to put

and how much to charge for access and this affected the growth rate of the paid-for digital platform.

The digital executive at Tiso Blackstar says newspapers in South Africa, as are newspapers in his newspaper group, do not have a “systemic” innovation process. He says while Tiso Blackstar has researchers who are constantly looking at trends, this is insufficient.

“A lot of it is like you see an opportunity and move onto it. Traditionally, media in SA has been very, very slow. Moving from spotting of an opportunity to the interrogation of the idea, (then) prototyping to taking it to the market. The company (Tiso Blackstar) sent a few employees to The Silicon Valley to study innovation culture. The lesson was how can we be quick off the draw. How can we build a technology base that allows us to quickly produce. It took us two months - from concept to Market - (to come up with) TimesSelect”.

The media studies professor says the sector is hardly involved in research. She says this is why editors have no quality data on why they are shedding readers consistently. She says she used to subscribe to almost every newspaper but now only subscribes to the Sunday Times. She says none of the newspapers she dropped know why she no longer is prepared to buy their subscriptions. “They don’t know because they don’t invest in any research”.

She says there is “no predictable process” of learning. “I think it’s experimental - which is not entirely bad. To expect a structure now is unrealistic”.

The learning at Independent Newspapers and Media24 seems haphazard and uncoordinated.

“We haven’t tried a lot of stuff,” notes the senior editor at Saturday Star. “What we do is that we give people a snippet of a story. We give them just enough to be interested.

“The reporters themselves will do a teaser of the story - to say I spoke to so and so - and tag The Saturday Star social media handles and the people featured in the stories. That seems to be working. On Saturday morning, we put out a picture and headline and a few paragraphs out to interest potential buyers.

“But then we have an online platform (IOL) that just puts the story out, man. So it doesn't matter”.

What she means is that the Group will have a newspaper out on the streets for people to buy, yet the same news information is made available for free on the website. So the effort to put half the story out on social media and to interest potential readers to buy is undone.

“We make a request to the IOL to at least put it out after mid-day. They have work to do. They have a certain number of stories they must put out per day. We get that. What we are saying is that can you please not put out the whole story online so early? Can we still drive people back to the newspaper because our business is still the newspaper? We can’t pretend that it’s not. We are working against each other. They are trying to put out something amazing. We are trying to drive people to our print product. So it’s a constant fight. It’s hard”.

The executive editor of City Press shares similar frustrations. He says Media24 took a decision to make newspaper copy available on News24 website as early as news copy is available. Just like Saturday Star, while the hard copy is out in the streets and malls being sold, the news stories are available for free on News24.

The senior editor of The Star says:

We discontinued the Star Workplace and our (readership) numbers went down. The reason for the discontinuation was that there’s no advertising in workplace. The rationale was that people were looking for jobs online, on LinkedIn. We decided as a newspaper to bring Workplace back - and the readers have been coming back. We now have Talent 360 (a special feature focused on HR and human capital) as a new innovation. It’s not marketed, and the numbers are stagnant. This is Workplace by another name”. Or rather, workplace that’s not working.

The digital editor at Tiso Blackstar says one of the costliest innovation mistakes involves the conceptualisation and sustenance of The Times newspaper he was editor of, which was shut down in December 2017, for over 10 years.

“It is one media innovation that was probably wrong from the beginning but that continued for 10 years. What was flawed about it was (the belief) that if you have

enough reach and penetration, you will attract advertising, especially retail adverts seen in The Star on Thursdays and Fridays. We delivered the paper to a prime market, the Sunday Times subscribers. But it was clear from early on that the core assumption was not meeting reality because the scale was there but the revenue was not coming".

So why did it take so long to close it?

"It has something to do with personalities that were running the company at the time. And the cost of running The Times only became apparent in more recent years. Having introduced The Times and married it to the Sunday Times, there was a fear that the Sunday Times circulation will nose dive if you canned The Times. It turned out not to be the case. But there was a fear".

The lessons by the industry arise from amateurish mistakes. If, for example, executives at Tiso Blackstar had a fear that the Sunday Times could lose readers if they discontinued The Times newspaper, what was the basis? There was no science that informed the fear. Similarly, a decision by The Star to discontinue Workplace without establishing how this could affect the newspaper's circulation is surprising in its amateurishness. Implications of management decisions are a basic thing to do. It is not quite on the level of the SABC deciding to, without any research, impose a 90 percent local music policy which later is revoked because it has significantly contributed to bankrupting the public corporation. But the principle - to investigate possible implications of one's decisions before implementing - is the same.

4.2.3 Technology, Process and Culture

CONTEXT: Respondents were asked to comment on processes followed in their newspapers or the sector to arrive at new innovations. They were asked about predominant innovation cultures in newsrooms and processes used to acquire technologies.

FINDING: Processes followed by the South African newspaper sector to arrive either at new product or process innovations are neither predictable nor structured.

Those who come up with innovation ideas have a responsibility to pitch it to whoever they believe could help bring it to fruition. Several respondents said the industry appeared comfortable with going on what is described as “gut-feel”.

The products developed and systems (algorithms and analytics) in use are almost similar. Google analytics and Chartbeat are used frequently to analyse web traffic and also to see how many times a story is being read, by who etc.

MOTIVATION: Given the creative nature of the sector, some believe there’s value in not creating a structure that then becomes burdened with the responsibilities to innovate. Ideas, they argue, could come from anybody.

The digital executive at Tiso Blackstar notes: “If you get an idea you pitch it to someone who is in decision-making layer of the company. It’s pretty ad hoc. Someone who has an idea sort of sells it”.

The media studies professor says the predominant innovation culture in newsrooms is uncoordinated, messy, random and rigid. “When the culture is rigid, you can’t get journalists and editors to give you what they think we ought to be doing”.

The senior editor at the Sunday Times says processes used are haphazard. He says it takes a major effort to change old, entrenched cultures and replace them with the business imperative of not just doing more with less, but doing more differently.

He says much is being done though to position Tiso Blackstar as one of the two main news players of the future.

The management executive at Tiso Blackstar says innovation teams must not be special teams that sit somewhere in the corner. At Tiso Blackstar, he says, this team includes editors, digital guys, designers etc. “It is the same team that came up with specialised magazines attached to newspaper titles”.

The journalism professor refers to an annual Innovation Conference organised by the CEO of Naspers on behalf of the group. “They will bring in people from outside in the hope that the editors who are sitting there can pick up ideas. There was (within Naspers) somebody who will work with you on the how. If you look, they

have Netwerk24, which is totally? walled. You can't access if you're without subscription".

The management executive at Tiso Blackstar says news firms arrived at decisions on what systems to use not in a structured way - it's "industry word of mouth". He explains the technology acquisition and use thus: "It's kind of like a shallow algorithmic stuff that tells you basic information.

The Media24 executive says that processes followed depended on how quickly the team expected to get results and how much a project would cost. For example, when Media24 brought a title like Huffington Post to South Africa as a digital platform, the group did not expect to immediately make profit and so such a strategic acquisition required board approval. The idea of separating an innovation team from everybody else has - repeatedly - not worked at Media 24. She believes the innovation team must be embedded within the editorial teams.

The journalism professor adds: "There's an appreciation of the need for culture change. But as you do this, you must keep the hen that keeps everything alive. You must appoint a Digital Head. Despite the fact that the digital hen lays quasi-eggs, it must still be given some mielies.

The digital executive at Tiso Blackstar says: "We are still very much at the start of the curve. In our company, we recognise that data expertise is a critical component of our business strategy. You can't really execute a proper subscription strategy without understanding what the data is telling you. My experience is that critical decisions are made on gut feel. People have a sense of the market, a sense of experience of the market. There seems now though to be a drive toward empirical decision making".

The digital executive at City Press says the innovation process followed has been a "hit and miss. Some of the technology we use was donated, some of it is very dated. A lot of it we come across by word of mouth, or through brainstorming sessions. Our default process has been 'come up with an idea or identify a need; Google the hell out of it to find a way to do it either cheaply or free, and then implement it'".

News24 and Tiso Blackstar have adopted similar ways of approaching innovation - by not creating a team that then gets put under pressure to innovate.

4.2.4 Flogging a Dead Horse: The death of newspapers

CONTEXT: *Respondents were asked to comment on whether or not they believed newspapers will survive changes brought about by digitisation. For how long will it still be feasible for the newspaper sector to continue producing newspapers.*

FINDING: There is consensus among respondents that the newspaper in its current format will die. This is because the number of readers is declining at rapid pace while, at the same time, costs associated with newspaper production are increasing without a commensurate increase in advertising.

MOTIVATION: The senior editor of the Saturday Star says the sector seems incapable of saving the paper. “I don’t think there’s a solution. I don’t think we are going to succeed. I think we are going to ride it out (until newspapers eventually die). Newspapers should be free. In the US, for example, you don't buy the newspaper. You get the newspaper”.

While the newspaper will die, this may take a while because, she believes, newspapers are more trustworthy than the Internet. She believes selling news online requires serious thought. She believes TimesSelect ’s greatest challenge is building a good number of digital subscribers. She feels that this area of work - inculcating a culture of digital subscriptions - still requires rigorous thought before the industry can make a breakthrough.

The digital executive at Tiso Blackstar says the newspaper in its current form is “rapidly disappearing”. He believes that some newspapers will disappear in the next five years - unless their readers agree to pay double what they are paying now. “It (physical newspaper) will survive for as long as consumers are willing to pay fair value for the product. As circulation falls, so does the incentive for advertisers. It’s getting to a point where advertisers will be arguing that it’s reckless to spend on newspapers”.

The senior editor at the Sunday Times says newspapers can only survive if their companies change from newspaper companies to technology companies. He adds that newspapers that offer something compelling will always have readers.

The executive editor of City Press says while the future of journalism is digital, making the newspaper's exclusive content available for free on News24 takes away the newspaper's crowd-pulling power and quickens its demise.

The Media24 executive avers that most of the national newspapers will die within ten years. Community newspapers will live longer because they serve a particular niche. She says the reason News24 publishes front page stories for newspapers like City Press for free is because they've done an exercise that shows that the "numbers don't look good" and they may soon have to "reduce the number of reporters". Where these stories could be read by an increased audience online, it is this audience that the group could leverage to generate revenue through advertising.

The journalism professor says the sector is engaged in a massive balancing act - the platform (newspapers) that makes money is old and dying, yet the platform of the future (digital) is funded by and can't survive without the old.

"Take the Guptagate emails as an example: It eventually became a Tripartite association of AmaBungane, News24 and Daily Maverick investigative journalists. This was the only way they (South African newspapers) could find the funds to deploy people to read and understand those emails and distil them into stories that are easy to digest for readers. Each one of those (media outfits) would not have been able to do it on their own. It's actually very hard".

That newspapers face certain death is no longer a question of speculation in the South African newspaper sector. The newspaper will die in spite of the innovations underway in the sector. In fact, it appears some of the innovations are meant to help force the newspaper to die rapidly. Selling a newspaper whose content is freely available is, on the surface, a bad joke played on readers. If anything, the sector is sending a strong message that its most valued platform is digital. Therefore, those who continue buying newspapers whose content is freely available are not doing it out of any obligation.

4.2.5 Monetising Digital

CONTEXT: *Respondents were asked to comment on whether or not the South African newspaper sector has figured out a way of generating revenue on digital platforms sufficient for its survival.*

FINDING: Respondents say that the future of newspaper houses rests on their ability to migrate their operations to digital platforms and, importantly, generating revenue sufficient to carry out operations and make profit. Respondents say that no one in South Africa and around the world has figured this out.

MOTIVATION: The senior editor of The Star says: “The challenge is that although we are moving online, there is no money online. Money is still being made from traditional (newspaper) advertising. Between Google and Facebook, they take about 95% of online advertising”.

The digital executive at Tiso Blackstar says: “People say people are not prepared to pay for digital news. Well, you can say not everybody was prepared to pay for news in print either. It’s not like in SA we had 100% penetration in newspapers, at best we had 25%.

We have approximately 20 million people online in South Africa. The key thing is that we haven’t produced products appropriate to this market. It’s not like you take what was in print and putting it in digital and hoping that we are going to find traction. Be more sophisticated. Understand this market”.

The Media24 executive agrees that competing for audiences and advertising with Facebook and Google is hard. She says data breaches, fake news and others risks that come with these giants’ use of artificial intelligence makes reputable outfits like News24 more credible and reliable.

The digital executive at Tiso Blackstar says that information and news ubiquity and attention deficit are, in fact, an opportunity for the sector. “Someone might say that this story you have in TimesSelect, I could find in news24. Sure, you might. Are you going to find every story we packaged and try to find a free equivalent? Or are you just going to pay us R50 or R60 a month to do it for you?

“There is so much noise. One of the things we forget as journalists and editors is that actually there is value in selection. Everybody is writing instant analysis. But be the professional.

Making sense of the news and (this could include) looking at the noise and say this actually stands out from the noise. This is what we are trying to do with TimesSelect. We are trying to sell not just on the material.

The pay off line is: Smart news in one take. It’s this idea that You can spend 20 minutes with this thing and it can actually take the stress away from you. Alongside great journalism, there is value in this package.”

The digital executive at Tiso Blackstar adds: “The free to air publishing is fast and is not the kind of thing that you can hold high and objectively say hope to win awards with. Just to give you an example: With TimesLive, we generate and publish about 100 odd stories a day. There’s no way that with a newsroom like ours, which is small, you can generate stories of weight and consequence. The economics of digital publishing don't really incentivise that.”

“But if you move over to a model like TimesSelect, where you publish once a day, premium content produced with more thought and has weight and is consequential journalism. And we ask that you pay R50/R60 per month. We are hoping to find some traction with it”.

“We need to appreciate the market as it is now - and not say let’s go after those newspaper readers”.

While the various media houses seem to be involved in major Schumpeterian catch-up exercises, a precarious future is fast becoming its present dilemma. The old and dying platforms still generate sizeable advertising while the new, exciting future of journalism seems to hang on a platform that is hard to monetise for a flat-footed industry battling to catch-up with Google and Facebook. The latter are simply raking in advertising without investing in any of the journalism that helps them generate revenue. When the newspapers start disappearing along with the revenue on which their digital operations hang, such eventuality will affect not only the quality produced for these platforms, but Facebook and Google too.

4.2.6 Groping in the Dark: Of circulation losses and speculation

CONTEXT: *Respondents were asked to comment on whether editors or newspaper owners know what exactly to attribute losses in newspaper sales to especially in light of economic factors affecting buyers, digitisation and or effects of bad journalism.*

FINDING: As newspapers lose circulation and speculation about the anticipated demise of the sector increases, South African newspaper owners and editors have no empirical data on what the causes of the decline are. There is speculation about the impact of technology, bad journalism or even economic factors impacting consumer's ability to afford the purchase of newspapers.

MOTIVATION: The media studies professor asks a rhetorical question at the heart of which lies a data conundrum for the sector: "Are they giving me what I want (as a reader)? No. I am looking for analysis to get ideas on how to change the world and make sense of my world, my South Africa. And I am not getting it from the people that I am reading. Some of it is just very much opinion. I can write that. Sometimes you do get analysis, mainly there is a deficit of ideas on how to change the world".

For the sector to give the media studies professor what she wants, it must have data about who she is, what interests her and how many other people like her are out there and how their interests differ from those of other readers, their gender, age, their social standing and buying power. Basic reader engagement could help create a better picture, but analytics could do this much better.

The media studies professor says that newspapers make silly mistakes when deciding to target women, for example, by ignoring women's interest in politics. She says she is not interested in "adverts for which washing powder is better than the other. Or which butter has less fat than the other". She says readers - including the youth - must be targeted with a bit more thought. She says young people who grew up accustomed to reading news online are not future readers of newspapers.

The digital executive at Tiso Blackstar adds that the mistake the sector makes is that editors try to come up with strategies to capture the attention online of lapsed

newspaper readers. He says the options available online are many and it doesn't necessarily follow that a lapsed newspaper reader is a likely digital subscriber.

The digital executive at Tiso Blackstar concedes that he, as a former newspaper editor, and believes the South African newspaper sector too, have no facts to explain why newspapers are losing readers. “How do we know? We don’t. The thing is we don't have really good data. As a traditional print editor, I sat there and asked why (circulation was declining). I was told everything from your content stinks to the weather. It’s wet months, people don't buy newspapers. We don't really have good, usable data. It’s also difficult, costly and expensive, time consuming to gather that sort of data”.

The media studies professor says editors won’t know why they lose readers because they don't have funds for research. “There’s no money to pay for proper journalists let alone for research. It’s definitely digitisation and (also) no great journalism. Nobody bothered to ask if they do great journalism when I stopped my subscriptions from their papers. My guess is that they (are) guessing why circulation is falling.”

The management executive at Tiso Blackstar says that newspaper circulation has been falling because of a multiplicity of factors. He says economic factors are an important consideration, even when there are no statistics showing the percentage affected. He says some of the readers are forced to choose between buying cell phone airtime or a newspaper. He says an avalanche of choices also meant that just as no one rushes home to watch the 7pm television news bulletin, many also don’t wait for a newspaper to arrive in the morning.

The senior editor at Saturday Star shares a sad tale impacting her sales that unfolded before her eyes: “I stood in a Woolworths queue one Saturday. There was the paper (on the shelves). There’s a man and a woman in front of me and it’s about 12 o’clock. And he says to her, did you see this story? Here’s the paper, lets buy it. She says but I saw the story on IOL(website). And he says yeah man, lets buy it. She takes out her cell phone and says here’s the story, the whole story. Now that - at 12 in the afternoon - she's read the story because it has been there since eight o’clock. Now I am standing there as the editor and I want to say please, guys,

buy the paper. It's very hard". While the example is vivid, she points out that it was this self-sabotage by newspapers and other factors affecting their sales.

The senior editor of The Star says "it's very difficult" to know what to attribute declining newspaper sales to. "When the numbers go down - our circulation guy can try to give away KitKat chocolate or White Star maize meal, people buy the paper because they want a packet of maize meal. It works to a certain extent. But the reality is that you can't up your circulation based on this". He adds that young people are knowledgeable about world affairs even though they don't read papers - so digital is major factor. The journalism professor is hopeful though that if editors audited the losses properly, they will be able to make informed assumptions. Therein lies the challenge: There seems to be a major case of negligence by the sector in that most of the editors did not know the exact reasons for the demise of their publications. They all seem to hazard a guess that a number of factors impact of circulation decline - but none is able to indicate which factor has impacted their readership by what percentage. In other words, they seem at sea on empirical evidence that must support and or inform their understanding of the nature of the challenge they face. If they don't understand the challenge, how dare society expect them to champion a solution? It is indeed a case of groping in the dark.

4.2.7 Actors and Networks: Sector ignores Readers - critical partners in innovation

CONTEXT: *Respondents were asked to comment on the importance of readers to the innovation initiatives and general news processes of the newspaper.*

FINDING: All the editors and scholars interviewed agree that readers are a central cog on which the entire news business revolves. Without reader interest in some topics, there is no business. But a closer examination of the responses shows that while the importance of readers is acknowledged, the readers are, in practice, largely ignored.

MOTIVATION: The media studies professor says reader involvement is "what should play the biggest role - and it doesn't. Nobody asked why I don't want their newspapers anymore. There's arrogance there. They (editors) think they can just dish out whatever they have been dishing out (for years) and it will work".

The executive editor of City Press feels that readers are taken for granted by the entire sector. “This is the biggest mistake,” he says. Proper reader engagement is only feasible online which also comes with a number of challenges. One of these, observed the News24 digital executive, is the racism, insults and hate readers published online which forced Media24 to shut its news comment section on its websites whose inadvertent consequence is reduced reader engagement.

The senior editor at Saturday Star is also concerned at the level of disengagement but worries more about readers who don't want their newspapers to change - at a time when general consumer behaviour is changing. “Our readers are weird. They are very funny. They don't want change. People (digital experts) say why are you not doing that? They (readers) say we must not change. Entertainment must not change - readers tell us. We changed, like drastically, and lost a lot of readers. What we don't know is that we must do it gradually. We changed from 48 Hours (an entertainment inset in the Saturday Star) to SaturdayLive - and we lost readers. We changed it to save time and duplication and to save costs - but it didn't work because people in Gauteng want to know what is happening in Gauteng. They don't care what’s happening in Cape Town. They don't care what’s happening in Durban. What we did is that we gave them a national product and there’s very little local stuff. And people don't like that. We did it with Tonight, an entertainment insert in the daily newspapers, and it didn't work. And this (SaturdayLive) is not working. People want something specific to them. People don't feel like SaturdayLive is for them”. She feels that readers are punishing them for poor engagement.

The senior editor of The Star says that his readers don’t complain about major things like front page news - they complain about small things like cartoons, puzzles, crosswords and occasionally about too much advertising in the paper.

He says when Sekunjalo took over from Irish owners of Independent Media, they re-looked some of the contracts and decided to terminate some and get rid of certain things considered small. When those readers woke up in the morning and found that their favourite features were not there, they complained. He says he tries to create an intimate relationship with readers. An example includes inviting some of them to witness how the newspaper was produced and printed, when it turned 130 years in 2017.

The journalism professor says that sustaining an interactive relationship with thousands of readers was a very difficult thing to do. He says it's easier done online where editors make the effort to run polls or ask questions with a view to improving reader engagement.

The management executive at Tiso Blackstar says while reader engagement could be improved, all innovative projects under Tiso Blackstar are "based on research and feedback from our readers - not what the editor will decide. Either through focus groups or quantitative research".

He says most editors don't engage readers as they ought to. He says editors should be evaluating reader feedback on social media to get a sense of what interests their readers and this, in turn, must inform the news agenda for the next edition. "If you want feedback - use social media. You get it immediately. If you wait for a letter to the editor, you will get it from a small group of traditional letter writers".

Visser says City Press (across all platforms) is very aware of who its readers are. The newspaper, she says, tailor-makes the content to its readers. "Also, our digital audience is young and savvy, and not shy to engage – so they will be the future older reader of City Press, ensuring that the publication stays relevant".

The digital executive at Tiso Blackstar says a "significant shift in the industry is that readers are more important than they have ever been. International businesses are building their businesses on reader revenue. The model of delivering readers to advertisers is rapidly retreating. For us, we see reader revenue as a very important part of our business going forward. That means investing in getting to know them than ever before. Part of this is data. Opening the doors a bit more. Intimate knowledge. Less of their voices outside but through the door. It's also critical that we produce journalism that they care about. That relationship between the journalist and the reader has never been more important".

If indeed that relationship has never been more important, what exactly is being done to give effect to this importance? Not much, I argue. News24 has said most of the reader comments are laden with racism and hate and should therefore be silenced. When this was done, so too were many other well-intentioned readers

whose voices are now missing, whose interests are today less known and therefore less taken care of than was the case previously. The approach taken by News24 was also adopted by the three other major media houses. The point though, is that if readers were as important as most respondents claim they are, the news houses would allocate resources to ensure that as the racists are correctly silenced, readers who want to engage journalists and each other without insults are able to do so. It is one thing to articulate importance, and another to put your money where your mouth is.

4.2.8 COMPETITION

CONTEXT: *Respondents were requested to comment on the nature of competition they face in the sector and to explain whom they compete against.*

FINDING: While newspapers used to compete with each other and, to a degree, against radio and television platforms, the floodgates for competition are now wide open. All respondents say that a proliferation of digital platforms has forced newspapers to compete not just against themselves, but with their readers' proclivity to write and break news online themselves. The speed of these online platforms has the greatest potential than other newspapers to render them irrelevant.

MOTIVATION: The senior editor at Saturday Star says her paper no longer pays attention to what other papers do or what stories they carry.

"We compete with people's lives. People's lifestyles. It's a completely different market to anything else in the industry. We compete with shopping malls, the movies. For us, it's: 'Are people going to stop eating in the shopping Centre and look at the front page and say I have to read that?' Competition is what other people have seen. It's social media".

The journalism professor says convergence means newspaper houses must be everywhere and, consequently, compete against everybody who disseminates news and information.

The City Press digital executive says competition is not platform-specific but "money specific". She says the "brand that is still alive is the brand making

enough money to stay alive. We need to utilise the various platforms available to us to leverage the project that help us stay alive".

The nature of competition is, according to the digital executive at Tiso Blackstar, fierce. The scale is global.

"Competition has never been harder. Animosity is at very feverish level. Competitor pool is big. We start with Facebook, google, twitter then News24 and traditional publishers. It's very, very fierce. It's not domestic competition. We live in a platform defined by global competition".

The management executive at Tiso Blackstar and the senior editor at The Star worry that the sector has no solution to the advertising dominance presented by the duopoly of Facebook and Google. The management executive at Tiso Blackstar says companies eating the sector's lunch today are those who, when he started off in newspapers in 1997, were either not in existence or producing what he terms "ugly computers called Macintosh".

The executive editor of City Press says competition is not platform-specific. "We compete for time - not against other media houses. That happened many moons ago".

The senior editor at the Sunday Times says inasmuch as his newspaper must still find a strong story that City Press does not have, an important component of competition is 24-hour television news channels in South Africa. He says while The Sunday Times sells on exclusivity and will always try to find what other newspapers don't have, television news channels have become a staple source of news, alongside digital platforms, especially for the middle class.

Newspapers compete not just with each other, or with radio, television and news websites. The lethargic pace at which they deliver news gnaws away at their relevance much more than anything. At a time when society no longer awaits the 7pm television news bulletins, why would anybody wait for the news the following day? If the news is exclusive, has depth and the analysis of which the media studies professor spoke, and the presentation is compelling, there may still be lingering interest the following day. The challenge though is that as newspapers are forced

to shed jobs, it has also shed some of its quality offerings. This further exacerbates the papers demise.

4.2.9 COOPERATION

CONTEXT: *Respondents were asked to comment on the nature of cooperation in the sector and the form it takes.*

FINDING: Cooperation in the SA newspaper sector takes the form of both intra-newspaper house cooperation and sector-level working relations to achieve a number of goals. These include economies of scale in distribution of newspapers, sector-level research, regulation and collation of sector information about sales, among others.

MOTIVATION: The senior editor of The Star says there's a bit of sensitivity in the sector about cooperation. This follows news reports that the Competition Commission was investigating possible collusion among top four newspaper houses. The senior editor of The Star confirms that Independent Newspapers had agreed to pay a fine and cooperate with the commission in its investigations.

The investigation relates to a body created several years ago to canvass advertising for the main newspaper groups, leaving small players out in the cold.

In various newspaper groups, digital disruption has forced the sector to re-look internal processes with a view to improve efficiencies and reduce costs. Most respondents confirmed this cooperation - sharing stories within one newspaper group - as industry practice. For example, City Press may carry the same story carried by Rapport newspaper, which is an Afrikaans newspaper within the same group (Media 24). In Independent Newspapers, the Durban-based newspapers like Mercury, Post and Sunday Tribune share and exchange stories with Joburg-based (The Star, Pretoria News, Sunday Independent etc.) and Cape Town-based newspapers (Argus, Cape Times etc.) in the same group.

Further, the senior editor at Saturday Star says her newspaper cooperates with a public benefit organisation called The Conversation - which is run by a former edi-

tor of The Sowetan Mr Thabo Leshilo. The Conversation helps to give The Saturday Star news article with depth and substance by turning research information into news readable by ordinary people.

At Tiso Blackstar, similar practices are confirmed the management executive at Tiso Blackstar, the senior editor at the Sunday Times and the digital executive at Tiso Blackstar who go further to say there's a complete review of reporting lines which eventually must help the group not just save costs but be quick in how it provides news and interfaces with readers on multiple platforms. The recent appointment as the digital executive at Tiso Blackstar is meant to make multiple platform, multiple newspaper title processing and sharing of stories seamless.

The senior editor at the Sunday Times says breaking down silos - or fighting fierce internal competition between digital teams and legacy newspaper teams is important to foster internal cooperation. The separation of these teams

The sector used to contribute to funding the South African Press Association (SAPA), a body that wrote news stories and released these to newspapers that contributed to their operations.

Outside of the various groups, cooperation entails co-funding the South African Press Council, which is responsible for the regulation of the industry, setting of standards and adjudicating over claims of violation of the public's rights.

The Publishers' Research Council (PRC) is a sectoral institution established to conduct generic research about trends in the industry. The Publisher Support Service mainly assists with the management and cost saving with respect to posters, mainly around the country's commercial hub of Gauteng.

Allied Publishers is another body created to help save costs in delivering the main newspapers around Gauteng and other inland provinces. Independent Newspapers and Tiso Blackstar confirmed to be party to the arrangement.

The Audit Bureau of Circulation (ABC) is another structure - but one with a fair dose of controversies. The journalism professor claims the ABC used to ensure that circulation numbers (number of newspapers sold) were audited and rules were followed rigidly - until readership started declining at a great pace in the sector.

These rules included that newspaper copies given away for free as part of promotions and those sold to corporates at less than 50% of cover price are not counted as part of the total sales.

The journalism professor says the industry then changed the rules to make provision for inclusion of newspapers that were also sold at less than 50% of the cover price and those being given away for free. “This is why you see papers being given for free everywhere so that they (the SA newspaper sector) can boost their numbers,” says the journalism professor.

It is troubling that newspapers seem to be taking a while to sort out misalignments on how cooperation must happen within their companies. This is one of the low-hanging fruits. The greater challenge for cooperation, which excludes anti-competitive behaviour, is out in the market. The silos between the “digital guys” and the “dinosaurs” in one media house is self-sabotage.

In addition, counting freebies as part of total sale count is not only self-deception, but may have implications for uncritical advertisers who may naively be duped into thinking they are buying more eyeballs than they may be getting. The Publishers Research Council is a body the sector should be using more especially given the speed with which the communication environment is changing.

4.3 SUMMARY OF DATA PRESENTATION

The South African newspaper sector seems to be involved in many acts that suggest inadvertent self-sabotage. The relationship between newspapers and their readers is imperilled by arrogance of the sector, on the one hand, and technological opportunities that place readers as the primary content generators and distributors.

A major business risk that the sector fails to learn from Malerba and Nelson (2007) is that users, in this case readers, are very important key actors in the firms’ success. If they are ignored, newspaper firms are unlikely to succeed.

Amateurish mistakes on how to introduce new products or absence of simple gimmicks required to raise excitement about new ways newspapers are doing

things not only bode ill for the sector, they underlie a particular malaise characterised by disorganisation that has stunted the sector's growth.

CHAPTER FIVE: ANALYSIS AND DISCUSSION OF THE RESEARCH FINDINGS

5.1 INTRODUCTION

The demise of newspapers is a topic that has pre-occupied several scholars and journalists for the past two decades (Akenson, 2009; Singer, 2011; Domingos, 2015; Linden, 2016; Simons, 2017 Dickel and Scrape, 2017; O'Sullivan, Fortunati, Taipale, Barnhurst, 2017; McCollough, Crowell and Napoli, 2015; Zolkepli and Kamarulzaman, 2015). Rapid technological changes have introduced disruptions that changed consumer patterns in a manner unexperienced before.

While peer-reviewed research on the innovation-newspaper interface showed that several scholars around the globe were engaged with the topic, research from African scholars was either dated or scant. Of the limited research available, none relied on the Sectoral Innovation System (SIS) of Malerba (2002), Mani (2006), Malerba and Nelson (2007), Malerba and Mani (2009) to assess innovation challenges facing South African newspapers. Mabweazara (2010) observed that this area of research was in its development stage and was still limited and fragmented. Gicheru's research focused on challenges faced by newspapers considered independent from governments on the African continent.

While the research touched on the need to embrace technology, this was not the focus. Other scholars Mabweazara (2010); Nassanga (2008); Banda (2010) also focused on the predominant theme of media freedom, although Daniels (2014) shines a spotlight on how social media and other platforms are transforming how South Africans are communicating. There was, generally, no information on what the South African newspaper sector was doing to offset challenges brought about by digitisation. No research could be found where editors, particularly of South African newspapers, were grappling with what the sector must do to survive the onslaught brought about by platform innovations.

In this research, one of the surprise findings was that editors had given up the fight to save the newspaper in its current printed form. While there was a palpable sense of distress expected among editors, what was not expected was the level of hopelessness uncovered here.

5.2 Background

The discussion of the research findings is delineated into two main thrusts to ensure alignment with the two research questions but also with the Sectoral Innovation Systems (SIS).

5.3 Discussion pertaining to Research Question 1
Research Question 1 was crafted thus:

In the wake of technologically-induced disruptions in the newspaper sector, are South African newspaper editors introducing innovations to obviate an apparent crisis of relevance? If so, how do they go about it? What are the factors that encourage or inhibit innovation?

The findings of this research are in line with peer-reviewed literature about the challenges faced by the newspaper sector in the wake of technologically-induced disruptions elsewhere around the globe (Akenson, 2009; Singer, 2011; Domingos, 2015; Linden, 2016; Simons, 2017).

The constituent parts of the SIS, as explained by Malerba (2002), Mani (2006), Malerba and Nelson (2007), Malerba and Mani (2009), are an important arsenal for not only the performance of enterprises (newspapers), but for the sector to overcome perceptions that newspapers are fatally afflicted relics (O'Sullivan, Fortunati, Taipale, Barnhurst, 2017).

In South Africa, the findings show that newspapers are involved in several innovation activities even though these are at very early stages. It is too early to tell whether the sector will manage to exist alongside social network giants considered not only major, but entrenched players in the dissemination of news and information.

The finding shows that key players in the industry have a full grasp of the issues affecting the industry. The various innovations introduced and those at early stages of development are unlikely to halt the march of technology. Netwerk24 is a subscription-based portal established by Media24 for Afrikaans news readers. While Media24 appear to be the first movers to put a firewall on this website, it's also easy to do considering that Media24 runs a monopoly on Afrikaans news. It's a

captured market. If a reader doesn't want to pay, they are forced to read English news elsewhere.

BusinessLive, as a concept introduced by Tiso Blackstar, appears the bravest attempt by the sector. The group has not released statistics showing how many subscribers it has managed to gain which will give an indication of its feasibility or not. Augmented Reality (AR) initiative by the Saturday Star is also a great attempt which seeks to marry both paper and digital.

The attempt by Tiso Blackstar to come up with new magazines off the newspaper brands in the group could work - to the extent that the mother titles are able to survive which, most respondents charge, will not be for long.

While there is evidence of active knowledge creation exercises, much work still needs to be done by the sector. Getting executives on a plane to the US and UK to learn how other companies are innovating is one thing, but it is quite another when the firms don't create processes or structures to help the process of ideation within newsrooms. Most respondents say that any member of staff who has an idea that may work has the responsibility to approach any member of management who they believe could help bring the idea to life. This is chaotic. There might be value in organised chaos, but this is not the way to go.

Much must also be made of the fact that newspapers don't make an attempt to find out why subscribers are choosing to no longer subscribe. The Media studies professor's cancelled subscriptions were a case in point. She said she was bored by what newspapers published. Yet, the editors said they were in the dark about why people/readers had stopped reading newspapers. It is even more alarming when the newspapers plead ignorance of the reasons why subscribers no longer subscribe because they have addresses and telephone numbers of these subscribers. This is concerning because the point was made that readership losses could be attributed to a multiplicity of factors. Trite though it might appear, it is necessary to underscore the principle of newspaper subscription: subscribers are readers who agree in advance to pay for stories that have not yet been written in the hope that what the newspaper will eventually deliver will be a quality acceptable to them as the payee. These are loyal readers who agree to pay even before they know what the newspaper will produce. Now, if newspapers don't make an effort to find out

why loyal readers are deserting them - how are they going to resolve what they don't know?

Blaming the rain or wet seasons for loss of readership seems improbable. If sales are lower this year than last year and the reason given is that it is because of rain – is it to be assumed there's more rain this year than the previous years in spite of the drought throughout the country? This appears a lame excuse that ought not to be countenanced.

While Mierzejewska (2017) had charged that newspaper sector was complicit in its own demise owing to ill-thought out free online versions of their own papers, it appears from this study that the sector is still caught up in self-mutilating exercises. At Independent Newspapers, the group's website uploads newspaper content on its website (IOL) as soon as the newspapers hit the streets. News24 also does the same.

It seems a rather bizarre strategy: why would any reader buy the Saturday Star if its main offerings for the day are available for free on IOL website? And why would any City Press reader buy the paper on Sunday if News24 also provides the newspaper's exclusives for free? This appears the clearest sign that the owners of these titles expect less from the printed papers but from their online platforms. It is unclear, however, to those charged with producing these papers what the end game is and the effect is a disillusioned, demotivated workforce that feels sabotaged by their own firms. While firms are central to the process of innovation in economies (Schumpeter 1934; Christensen 2013; Christensen, Dillon, Hall and Duncan, 2016; Porter, 1990, 1995; and Malerba, 2002), the level of market confusion exhibited by the sector can only hinder the process of innovation.

The Economist magazine announced the death of newspapers in 2006. Over a decade later, newspapers are still around but grappling with how to change antiquated business models to remain relevant. In the end, though, newspapers in South Africa will surely not survive in their current form. What this research confirms is that even those in charge of newspapers who ought rightly to be doing everything possible to keep them running, have given up. They are riding out the tide.

5.4 Discussion pertaining to Research Question 2

Research question 2 was crafted thus:

Rapid advancement in technology has enabled firms and service organisations to use analytics and algorithms to improve customer relationships. What are the types of actors that newspaper editors interact with to improve competitiveness? Does the newspaper sector involve readers, considered key actors in the news ecosystem, in the search for solutions to disruptions occasioned by rapid technological changes? And what is the nature of these interactions?

Readers are what makes the sector. While there's an appreciation of the importance of the reader, it is telling that none of the three major newspaper houses have a reader engagement strategy. At best, the sector spews platitudes about the pride of place occupied by the reader. To revert to Media Studies professor example, if the reader was as important, the newspapers would have wanted to find out in what ways they stopped serving her best. If not to save her as a reader, at least to take corrective action to ensure more readers are not lost for similar reasons. Media studies professor does refer to an arrogance that says "they think they can just dish out whatever they have been dishing out (for years) and it will work". It may well be arrogance or, perhaps, a lack of imaginativeness or poor comprehension of the theory of change and how to manage it and how to build competitive advantage (Schumpeter 1934; Christensen 2013; Christensen, Dillon, Hall and Duncan, 2016; Porter, 1990, 1995; and Malerba 2002).

The Saturday Star Senior editor seems exasperated when she says her readers are funny and do not want change. Perhaps they do and, instead of just giving them what the management has established readers want, they (readers) need to be engaged first. They need to be made to feel part of the decisions being taken about how their favourite newspaper must reposition itself. In this way, when change (Porter, 1990, 1995) eventually happens, the reader will know a little more about it because they would have been part of the process - rather than being informed of what is changing. The same applies to Sekunjalo's decisions to simply change cartoons, puzzles and crosswords in The Star. Cost saving exercises can be done tastefully. It's not just about reviewing a contract, as The Star's Senior

Editor averred. It's about having a full appreciation of the importance of these puzzles, their interest to what number (statistics) of readers and then devising a way of engaging the reader before effecting change (Hanna, Rohm and Crittenden, 2011).

The management executive at Tiso Blackstar says all digital innovations are taken through some test with readers to check feasibility. He then expresses a frustration that most editors don't engage sufficiently with readers online to check what interest there is on the stories they are working on for the next paper edition. There are two concerns about this: if you already have feedback from readers on a particular story would this not suggest that the "new" in news is already out there? If so, what then would be the value proposition of an un-new story?

Secondly, does it follow that the people who comment on stories online are the same people who will buy a printed copy of the newspaper the following day? What portion or percentage of online news readers are in fact hardcopy readers? The newspaper sector in South Africa does not have this research which confirms, in part, that the sector is groping in the dark when it could be investigating hybridisation (Milosevic and Henriksson, 2014) or substitutability of mediums (Flavián and Gurrea, 2009) or reading overlap Mitchell, Gottfried, Barthel and Shearer (2016).

Other actors include those involved in competition with newspapers. Newspapers are in competition with each other, with radio, television (most importantly 24-hour television news channels), websites, social media networks and, as the Saturday Star Senior editor puts it, with people's lifestyles. Newspapers, as part of the broader media family, used to be the primary sense maker of societal information (Lewis, 2012).

Today, that gatekeeping role is wide open to individuals who are more writers than they are readers on social media networks, thus contributing to clutter (Edmunds and Morris, 2000; Eppler and Mengis, 2004). Competition, therefore, is not just between mediums and platforms: it's also about how the reader sees him/herself in relation to the medium.

Internally, newspapers in South Africa are engaged in major restructuring to align newspaper and digital processes. This may heighten automation anxiety (Akst,

2013). Where newspapers fail to do research internally on why they are losing readers, an industry body called the Publishers Research Council (PRC) could help with co-operation around the generation of generic but useful information on reasons for loss of readership. This could extend to many other areas that require research.

5.5 SUMMARY OF THE DISCUSSION

The analysis in this report strongly suggests that South African newspapers are not likely to survive in their current form. The sector is hopeful for a future on digital platforms. A major challenge is how to monetise digital operations given the fact that Google and Facebook have captured the online advertising market.

The industry is making major mistakes by making content that should be sold, freely available. It needs to delineate what is sold from what is free and create a market in the mould of Tiso Blackstar's BusinessLive and TimesSelect. If readers respond, this will be great.

According to Malerba (2002), Malerba and Nelson (2007), Freeman (1982); Rosenberg (1982), knowledge generation and learning; technology, processes and culture; actors and networks; competition; cooperation are important in the SIS. The processes used by the sector to arrive at new products or service innovations leaves much to be desired. It is almost as if this is not a sector in crisis trying to find a solution to its almost obsolete ways of engaging readers.

Another major mistake is that readers are treated as an afterthought by the industry. This is particularly troubling for an industry that depends on readers. This could be manifest arrogance or management inertia at a time of heightened competition.

CHAPTER SIX: CONCLUSIONS AND RECOMMENDATIONS

6.1 INTRODUCTION

Once the primary sense-maker of information in society, newspapers around the world today face extinction. While some blame innovation or, more specifically, the rapid advancement of technology, for the woes besetting the sector, it is also to innovation that they look for solutions to save the sector and jobs.

This is a ground-breaking research in South Africa because peer-reviewed literature showed that there is no single study conducted using the Sectoral Innovation System (SIS) to look into whether or not the South African newspaper sector is innovative or not.

6.2 MAJOR FINDINGS

Major findings for this research are:

1. South African newspaper companies and editors have given up the fight to save newspapers in their current form (newsprint).

2. Editors and newspaper companies are introducing myriad innovations in a bid to salvage the power of the print brands with a view to ‘sweating more life’ out of these online. The actual papers though are on an unstoppable descent to irrelevance.

3. Innovation processes used by various newspapers are mainly random and haphazard. There is neither a discernible innovation culture nor predictable, repetitive process of arriving at new products within South African newspapers.

4. Relationships with a number of innovation actors like venture capitalists and readers are, while considered important, not sufficiently explored through algorithms.

5. While many of the innovations are, at best, in their embryonic stages, the sector lacks quality data on what, in fact, is contributing to loss of readers.

6. Competition is across platforms and not just between media houses - but also against the very readers they compete for because readers' proclivity for writing and breaking news is taking off at great speed.

6.3 KEY CONCLUSIONS OF THE STUDY

The South African newspaper sector neither has a strategy nor the wherewithal to save newspapers. It is apparent from this research that many editors are simply waiting for the day nobody goes out to buy a newspaper.

The processes used by the sector to uncover innovations currently in use are random, uncoordinated and newspapers are without thought out structures to harness energies and guide employees, in various sections, to contribute in the generation of ideas. The predominant innovation culture excludes many who could be contributing if necessary, inclusive structures were in place.

The sector's relationship with its customers has suffered major neglect. While editors agree that readers are important and must be engaged, there is no one large-scale programme to give effect to the stated importance of the relationship with the reader.

6.4 RECOMMENDATIONS FOR THE NEWSPAPER SECTOR

6.4.1 The newspaper sector must invest resources to develop a relationship with its readers. In this age of technological disruption, it is important that the sector must evolve a relationship it has with readers to find out more on what interests the customers.

It is one thing to know that a particular story is read more than others or a particular journalist is more popular or receives more hits than others. It is quite another to use technology to establish base knowledge on patterns of behaviour or readers' areas of interest and disinterest. This is what, in part, former Burberry CEO Angela Ahrendts did to turn around the fortunes of the moribund UK clothing store before she was recruited by Apple to become Senior Vice President and head of its commercial wing a few year ago. But knowing, understanding and developing intimate relations with customers has now become a way of life for many brands.

6.4.2 Newspaper groups must appoint innovation champions.

These are not the same as Digital Editors. Innovation champions will be people who are not burdened with editing stories for online or digital platforms.

Instead, these are champions who will lead the process of ideation (idea generation), strategy formulation and implementation, and the purposeful instigation of an innovation culture within newspapers. The current practice of burdening digital editors with innovation responsibilities has stunted growth and slowed progress in the sector.

6.4.3 The sector must initiate discussions and develop close working relationships with not only journalism departments in universities, but also innovation departments. There exists an opportunity for the full realisation of a Triple Helix (university-industry-government) ecosystem which could enable the sector to deal with some of its intractable challenges.

6.4.4 There seems to be an assumption that because journalists work in a communication environment, they and the sector do not require much help in getting their messages across. There are several examples of products and process improvements that are poorly communicated to general newspaper readers and require services of marketing specialists.

6.4.5 The South African newspaper company owners must fully embrace technology and stop waiting for a Silicon Valley-inspired solution to challenges that, while global in nature, have local specificities.

6.4.6 The sector must adopt a uniform approach - without violating anti-competition laws - to utilisation of firewalls. When one group puts up a firewall and another does not, the sector may never know the usefulness of this exercise for the future of newspapers.

6.5 SUGGESTIONS FOR FUTURE RESEARCH

6.5.1. This research report looked at whether or not the newspaper sector is innovating and, if so, how. It also looked at the various actors involved in the process. There's a need for further research to compare the outcome of this research

with other similarly-sized and media-mature economies on the African continent but also in the Global South. Are the factors impeding innovation in the South African media landscape similar to other countries with similar indices?

6.5.2. There is a strong sense of haphazard activity and uncoordinated innovation actions coming out from this research. Future research could look more deeply at whether or not this was occasioned by management inertia or it is a general malaise afflicting owners, management and reporters.

6.5.3. There also seems to be confusion in the sector on the difference between innovation, digitisation, creativity and mere general action meant to help the firms to survive. A survey measuring the levels of awareness might shed light on the root of sector confusion.

6.5.4. Lastly, it is here recommended that the sector must fund research that will establish the exact reasons why newspapers are losing readers. There is a lot of dependence on anecdotal information.

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4. APPENDICES

4.1 RESEARCH INTERVIEW PROTOCOL

Interviewee:
Date:
Interviewer: Makhudu Sefara
Topic: Quo Vadis: The Innovation Challenge for South African Newspaper Sector

*** Desired Outcomes/Objective of the Interview**

- This is a qualitative research.
- I will use semi-structured interviews
- The objective of the interviews is to establish if the newspaper sector does, in fact, innovate. And to find out how it goes about innovating. What factors in the sector influence innovation.

*** Key data about the interview: or the structure of the interview**

- purpose and duration of interview
- These should take approximately one hour

*** Information on the interviewee:**

- In which profession is the interviewee:
- Title/Position:
- Career Highlights of the interviewee:

***Key information about the interviewee's firm:**

I will write information that briefly explains the company for which the interviewee works

*** Key points for how to introduce/position interview**

- We start the interview by establishing the interviewee's credentials
- This will help me confirm that the interviewee is suitable and or relevant for the interview
- I will then direct questions according to current and past innovation practices. This will be in line with the SSI framework - especially the two key themes of knowledge and technology, and Actors and networks.
- I then will move to what should be considered for the future.
- I round it off with contextual questions about factors that could be relevant but that may not have been asked. Or persons of interest who the interviewee may feel ought to be interviewed.

*** Documentation plan: Additional notes on which to rely when doing the interviews**

- I will access publicly available information about each interviewee's organisations ahead of the interview.
- These may include documents available on websites website about the performance of the company, assessments of the industry, their roles in various organisations and any articles they may have written that are relevant to the interview.
- These will be helpful for summarisation and comparisons when assessments are done

4.2 DRAFT REQUEST LETTER

Dear Sir/Madam

My name is Makhudu Sefara. I am registered for a Master of Management in the Field of Innovation Studies degree at Wits Business School, a graduate school of University of Witwatersrand. I am a former newspaper editor with keen interest in innovation.

I write to request your participation in my research which is a requirement for the completion of my degree. This is an enquiry into whether or not the newspaper sector in South Africa engages in innovation and, if so, of what kind and how. I will be looking into issues of technology transfers, learning, innovation culture in newsrooms, investment in research and development, competition, co-operation and if users (readers) play any role in innovation in the sector. The interview will take approximately 60 minutes of your time.

The intention is to speak to title editors, retired editors, media innovation scholars, digital editors, newspaper company managers and other people with expertise in the newspaper-innovation nexus. Your participation and contribution is important to me and could help the sector find systematic ways of resolving major innovation-related challenges and unlocking potential for future growth.

Should you feel inclined to participate, such participation will be voluntary. And you may, at any point, revoke your participation if you wish to do so. Should there be aspects you wish to share but not have them attributed to yourself for fear of victimisation by your organisation or the sector, you are free to point these out to me. The questions are here attached.

Thanking you in anticipation of your help

_____

Makhudu Sefara, Mr

Email: makhudu.sefara@gmail.com

Cellphone: 082 774 8489

4.3 INTERVIEW QUESTIONS

1. Understanding your area of work

1.1 Tell me more about your role and responsibilities?

1.2 Does your newspaper innovate?

1.3 How do you go about it? Is there are structure responsible for innovation? Is there an innovation champion and or strategy?

2. Knowledge and Technology

2.1 Of the innovations currently in use in your newspaper/sector, what was the process used to discover them and their possible use?

2.2 What is the predominant innovation culture in the sector/newspaper (firm innovation culture)?

2.3 Does the newspaper/sector invest in research into the changing communication ecosystem? If so, what are the figures for the last three financial year?

2.4 How do you arrive at new product developments? Is there a predictable process?

2.5 Do you procure new technologies (machine learning? Algorithms) to help with business growth? What is the process? Please elaborate and list examples.

3. Actors and Networks

3.1 Broadly, what is the nature of competition in the newspaper sector in South Africa? Who or what do you compete against?

3.2 Is competition platform or channel-specific?

3.3 Is there co-operation between newspapers in the sector? What form does it take?

3.4 What role do readers - as users - play in ensuring the continued relevance of the newspaper?

3.5 What is the relationship with venture capitalists (and other money lenders) given the massive costs associated with radical innovations, for example?

4. General

4.1 What successes have been attained as a result of innovations introduced

by the newspaper/sector?

4.2 What are the costliest mistakes and lessons learnt from new innovations you experimented with?

4.3 When there is a decline in circulation - how do you know what to attribute it to? How would you know if it’s digitisation or people just don't think you do great journalism anymore? Or, still, economic factors beyond your control (newspaper becoming unaffordable)?

4.4 Any relevant or contextual information you believe could help with this research? Any person you recommend I interview for this research?