

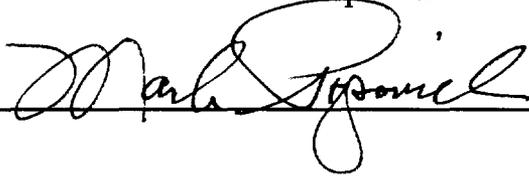
The Paperless Paper: Passing Fancy or Potent Possibility?

An Honors Thesis (HONRS 499)

by

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ABSTRACT

This discussion of the presence of newspapers on the World Wide Web serves two purposes. First, this paper serves as a snapshot of what newspapers are doing with web technology in early 1997, with glimpses of each area of newspaper business as it deals with the web: advertising, classifieds, circulation and editorial. While not intended to be a all-encompassing look at what every newspaper business in the country is doing with the web, this is a look at what the major opinions are as of April, 1997. Second, this paper takes a unique look at what newspapers in Indiana are doing with the web. While the purpose of taking a look at Indiana newspapers was to find a regional angle on a national topic, the newspaper industry in Indiana does provide a good cross-section of large, medium and small newspaper publishing companies, and could very well serve as a barometer of the popularity of web technology in Mid-America.

I. INTRODUCTION

Does the phrase "http://thestarpress.com" look like a line of nonsense? Or is that phrase a meaningful bit of information that can provide the key to a wide array of resources?

More and more, World Wide Web addresses, such as the aforementioned Muncie Star Press address, are becoming more familiar to the general population as valuable additions to everyday living. At the least, web pages tied to media outlets are a supplement to newspapers, radio and television; they could very well supplant the older media in the next century.

Or will they?

Despite the Web's popularity in 1997, the role of the medium in American and world media is still in its infancy. Most news sites are produced by conventional media, meaning web sites are often used, especially at smaller newspapers, as supplements to the main product. Combined with the expense of computers, which run nearly \$2,000 in 1997, and the uncertainty of future developments, there is some question as to whether the Web will become a mainstay in American homes or pass the way of the 8-track or Betamax video recorders.

There are three main questions to be answered when examining media use of the World Wide Web in 1997. First, the level of use of the web has to be calculated, not only in terms of how many people use it, but also in terms of how much people use it. Second, in order to gauge popularity on the production end, one has to compare the number of media outlets "on the web" to the actual number of media outlets. Third, in what probably the most important factor in considering this issue, is the actual scope and timeliness of information at media web sites, especially when considering how much original information is put on the web. There are also other issues, namely economic, that factor in to the web importance equation.

In this examination, the role of the print media is the main consideration. While radio and television have made their marks on the web, the similarities

between newspapers and the Web insofar as means of transmission [essentially the printed word] are very close. Also, the role of the print media was selected because of the author's interest in newspaper issues and management.

So who uses the web? And why is it popular?

II. JOURNAL OVERVIEW

Most information used in this presentation comes from various trade publications, such as *Editor and Publisher*, where there was a 40-page section on newspaper use of the Internet in the Feb. 8, 1997 issue, *Advertising Age and Quill*. Also, some work has been prepared for weekly national news magazines, such as Elizabeth Gleick's look at the newspaper industry in *Time* in October, 1996.

Much of the information I found in printed sources came from the last four months of 1996, when much was made of the creation of an online presence for *The Wall Street Journal*. However, developments in web technology and business occur at a fast rate, a rate that trade publications and journals hardly can keep up with in printed form. So with the help of personal interviews and research on the web itself, I have attempted to compare statements made in trade journals with what is actually on the web. Furthermore, for purposes of providing a regional angle to this paper, I am adding information relevant to the state of Indiana.

III. CURRENT TRENDS

There's no doubt that the World Wide Web [or simply "The Web"] is growing in terms of number of users at an ever-increasing rate. According to Fenton (1997), the number of users on the Web is growing at 200 percent per year. Spending on web advertising, meanwhile, grew at a 700 percent rate (Levins: 4i). And those numbers continues to rise.

In fact, the number of people currently experimenting with the Web is causing major delays in information transfer. According to Fenton's article, the Web is "so busy that nobody bothers to go online anymore. Even users with the patience of Yogi Berra are getting frustrated by long delays." (Fenton: 41).

But, despite the delays, people are getting on the Web. And they're going more and more places each day.

That argument, the one of continued exploration despite the delays, is used by researchers who claim the Web will have an expanded impact on everyday life in the next century. They claim the Web will become as much a medium as the telephone, radio, television and newspaper — all combined into one source.

According to Grove (1996), the power of the Internet on communications media will have a "10X", or typhoon, force on the industry. Like Harvard Professor Michael Porter's conclusion on the affect of the Web on business, communications companies can obtain "win-win" results: lowered media transmission costs combined with new sources of revenue.

Currently, the newspaper industry isn't a healthy one. Cities that traditionally had more than one newspaper now find themselves with only a single paper. Newsprint costs are skyrocketing. Advertising revenue is falling. Subscription levels are falling. And newspaper employees — especially those in editorial — are finding themselves without jobs.

While the average newspaper profit margin remains twice that of the average Fortune 500 company (Gleick: 67), the profit margin has shrunk to half of what is was in the 1980s. Some 300 daily newspapers have changed hands in the last five years, and circulation has dropped by three percent during the same time frame. As a result, 13,000 newspaper employees have lost jobs and newspapers in 38 cities have shut down.

That trend is present in Indiana as well. Two cities with newspaper holdings by Central Newspapers, Inc., Indianapolis and Muncie, each saw consolidation in

the 1990s. In Indianapolis, where business operations were combined for decades, the separated editorial departments were combined to form a one-staff operation to produce two newspapers. In Muncie, some employees were let go after the morning evening newspapers merged to form a single morning newspaper.

Three problems have dragged down the newspaper industry. First, the number of people reading newspapers has dropped considerably. According to Gleick (1996), 78 percent of adults surveyed in 1970 read a daily newspaper. In 1995, that number dropped to 64 percent. Among people aged 16-24, that rate dropped to 52 percent.

The second major problem facing newspapers is the recession cycle. Newspapers are recovering from the effects of recession in the early 1990s. That cycle started with retail industry, which meant the money available for retail advertising went down. That revenue loss hit newspapers hard, forcing drastic cutbacks.

The other problem is that of alternate media, including the web. Over the last decade, cable television, direct mail, niche publications and online services have cut away at newspaper advertising and circulation. As a result, newspapers have been sent scrambling to find additional sources of revenue.

IV. KEY ISSUES IN NEWSPAPER WEB PUBLISHING

The central question of the issue of newspapers making a presence on the net is simple: will newspapers go the way of the dinosaur if not on the web?

According to the third annual State of the Newspaper Industry survey released by Hearst Newspapers in June 1996, 45 percent of American newspaper publishers, editors and classified directors are worried about the long-term impact of the Internet, making it the fastest growing daily concern at newspapers. Thirty percent of survey participants also said the Internet would be the top reason print newspaper companies will be less healthy in the future.

However, what newspaper executives think about the possibilities existing on the web vary. While 44 percent of executives say new forms of interactive publishing can make companies more profitable, only 10 percent of those with an online presence said their service was currently profitable. One in three executives at papers starting a site said the company was doing so in order to turn a profit.

That makes the decision to go online difficult. Still, of the top 25 newspapers in the country in terms of circulation, all have a web site. But the decision to create a presence requires a lot of work in each area of the newspaper business — advertising, classifieds, circulation and editorial.

Advertising

Of the newspapers that rank in the top 25 in terms of circulation, each web site either charged subscription fees or sold advertising for its web product. While subscription fees were rare for sites (only three sites required registration, and only one — The Wall Street Journal — charged for using the site), advertising was present on every site.

While Internet advertising remains a small part of the total media advertising pie, it is the fastest-growing advertising medium in the world. Estimates place spending for web advertising at \$5 billion by the year 2000. That's compared to \$300 million in 1996 and just \$40 million in 1995 (Levins: 4i).

However, at least early on in the web advertising game, it appears smaller newspapers' sites are losing out on ad revenue to larger, national sites. According to Fenton (1997), more than 90 percent of the 800-plus web sites run by newspapers lost money in 1996.

Some of the problems local newspapers have in drawing major advertisers to their sites, according to Thomas E. Hyland, co-chairman of Coopers & Lybrand's Media and Entertainment Group, is in logistics. Hyland said in Fenton's piece that the large pool of web sites run by newspapers makes it difficult for national

advertisers to do business in specific geographical areas. Also, the local advertisers newspapers depend on for revenue might not be willing to go on-line considering the relative lack of users in the mid-1990s. (Fenton: 5i).

However, concerns with market reach might be diminished in the near future. Only 15 percent of U.S. households had Internet access in late 1996, but that number, according to a study conducted by Forrester Research, could reach 53 percent by 2001.

Forecasts of the growth of the Internet bode well for local web sites. As hits increase at local sites, local advertisers can begin to tailor ads to clients that access the local newspaper site, thus duplicating a major advertising revenue base currently found in print newspapers.

Classifieds

One area newspapers are looking at for web usage is classified advertising. A few papers already do it, and those that don't might do so should the right competitor come along.

According to the Newspaper Association of America, classified advertising accounted for \$13.7 billion in revenue for American newspapers in 1995, which was 38 percent of newspapers' total revenue stream. While the impact of classifieds on the Web is small (if any), the threat of non-newspaper companies putting classified-type ads on the Internet is prompting some newspapers into action. In fact, Peter Levitan, president of New Jersey Online, calls the Internet "the most significant new event we've had since someone figured out what a classified is." (Kelly: 23)

The players who are threatening to take on the newspapers' monopoly on classified advertising are such companies as Microsoft, who is developing a series of web sites classified by city. Those sites, called CityScape, will have local news and items of interest, including regionalized classified advertising. Other companies, such as America Online, Yahoo! and Lycos have similar plans.

In a response to planned moves by internet companies, six newspapers — The Boston Globe, Chicago Tribune, Los Angeles Times, The New York Times, San Jose Mercury News and The Washington Post — combined to launch CareerPath, a site that links the help wanted ads from those six papers. Also online are classified ads from The Newark Star Ledger, The Jersey Journal and The Trenton Times, who are posting all their ads on New Jersey Online.

Sites like CareerPath and New Jersey Online have two possible sources of income outside of charging web users. The first, which CareerPath uses, opens up the site for postings from other newspapers. Those newspapers that want to put their listings on the site pay for the postings. As of November 1996, 23 newspapers were putting their classified advertisements on CareerPath (Kelly: 24).

The other possible means of raising revenue from classified web sites, although not widely used, is charging individuals to place the ad both online and in print. According to Kelly (1996), most papers, such as The New York Times, are placing their print classified ads on the web as a value-added benefit to placing an ad in the paper. However, the prospects for web-based classifieds from newspapers isn't all that great, according to Randy Bennett, Newspaper Association of America vice president of new media.

"I think there's some incremental revenue, but generally we're not seeing huge cash flows. It's added value and a way to protect their existing franchises." (Kelly: 27)

The other major consideration when dealing with classified advertising on the web is its usefulness to those outside of the newspaper's marketing area. While help wanted ads can be utilized by those worldwide searching for work, the prospects of selling a car on the web to someone hundreds or thousands of miles away can be prohibitive.

Lancaster Newspapers of Pennsylvania places classified ads on the Ad One database for an additional charge of \$5 a month. According to Russ Gillespie, classified ad manager for the newspapers, not many ads outside of employment and

real estate make the web.

"It absolutely makes sense for real estate and employment, but someone in France probably isn't going to be too interested in buying your old couch or a second-hand washer and dryer." (Kelly: 27)

The bottom line for classifieds on the web is rather cloudy. Certain ads, such as help wanted, can be a money-maker for newspapers as more and more employment agencies realize the potential of the web. However, most other ads, such as sale ads, won't be profitable, as distant customers won't be interested in buying common wares.

Circulation

The World Wide Web, for the most part, is a medium that doesn't charge for information. For circulation managers, that statement becomes painfully clear when they find out the limitations in raising revenue by means of subscriptions. They just can't do it. Or at least that was being said in late 1996.

In 1996, The Wall Street Journal, according to Hodges (1996), had 600,000 people registered at its web site before Labor Day. Two weeks after that holiday, that number dropped to 30,000. The reason? The Journal started charging an annual subscription fee to access the site.

However, according to Timothy Andrews, editor and executive director of enterprise products at Dow Jones, the decision to charge a subscription fee started to pay off in early 1997. In a panel discussion held at Ball State University in March 1997, he claimed the WSJ site was drawing some 100,000 paying customers.

Andrews' claim defies a trend cited in late 1996. According to a study done by Forrester Research, few web sites will break even by the turn of the century. Of those that do turn a profit, some 90 percent of revenue will come from advertising. Only about six percent will come from subscriptions.

Although some information might be worthy of a subscription price for its unique qualities, charging for that information might be more trouble than it's

worth. Hodges (1996) cites the nature of the medium, small audience and costs of emerging technology as reasons to forego charging subscriptions.

Those markets that do charge subscriptions, such as ESPN's SportsZone site, have found a combination of free information and low-charge premium bits to be a compromise to the extremes of full-blown subscriptions and a no-charge site. Such sites provide basic news for free while charging around \$5 a month for expanded coverage, such as columns and audio clips. While ESPN won't comment on the level of success of its site, the idea set a standard for other sites to follow should an organization decide to charge for information.

Meanwhile, Andrews said the idea of charging for access to a news site will pay off as customers begin to sort out sites and settle in on a few favorites. He said customers will tend to see sites that charge as more reliable in terms of news coverage than free sites.

"We're making a lot of different decisions than a lot of other publishers that you see on the web," Andrews said in the panel discussion. "We believe that content matters, and we believe that people will be willing to pay for content.

"You can charge on the web for content that is of value for people that are subscribing."

Early on, however, the idea of charging readers for information found on the web, in an age of mostly no-charge sites, seems to be an idea that only turns away readers. For newspapers to turn a profit on its web site alone, advertising would be the better revenue source.

Editorial

Nationally, there appear to be three trends to what is included on newspaper web sites in terms of editorial content. While some newspapers offer web-specific stories, and while more have open forums and other bits of information on their sites, many smaller newspapers are merely repackaging their newsprint content for

web publication.

Larger sites, which tend to have more manpower resources, tend to have more in the way of original content. They are updated more frequently than once a day, offer special stories and offer other special items of interest.

In constructing The Wall Street Journal's site, Andrews said the major factor in maintaining a profitable site was fresh news and information. "[The WSJ site] is not merely a repurposing of the print newspaper. It is a living, breathing product. It has a separate editorial staff. We have 30 people who are specifically pulling from Dow Jones editorial resources worldwide."

Specifically, the WSJ site offers constant news and stock quote updates, web-specific features and other financial information from 75 bureaus worldwide. Also, the WSJ makes its archives available for database searches.

Andrews cites four advantages to electronic publication. They are:

- timeliness — instant updates
- easier to use
- 24-hour access to information
- ability to search documents faster

Of those points, the one that is most critical is the issue of timeliness. With thousands of web sites potentially putting up information at any time, the era of the single-deadline writer could be dwindling, especially if the web boom continues.

Tony Majeri, the Chicago Tribune's senior editor for web development, has one simple phrase to describe the worthiness of newspaper web sites.

"Content is king, bottom line."

Majeri, who also spoke at the Ball State panel discussion, said his involvement with the web brewed from an interest in taking part in a new form of storytelling. That form, in its ultimate version, would involve more than text: video and voice now become players in the newspaper industry the advent of the web.

"We don't need good technicians," Majeri said. "We don't need particularly

good camera people. What we need are people to tell stories...journalists that are able to understand the use of sight and sound and motion and the ability to create an interactive channel with those things."

At the Tribune's site, content from the printed paper, both text and photo, is reposted. However, the paper, according to Majeri, is experimenting with other forms of reporting, including television and the use of video and audio on its site. Also, the paper has created "virtual communities," or sites tailored to different neighborhoods or suburbs of Chicago.

With the help of the media lab at the Massachusetts Institute of Technology, Majeri and the Tribune are crafting a web site that merges the various technologies with present journalistic tools to tell "powerful" stories.

Of the 25 largest newspapers in the United States, the vast majority have developed material for their web sites that go beyond the printed paper. The most common addition to stories was information about area events and organizations, as well as general community information. Papers also provided search mechanisms, although some charged for archival service. Some — including the Cleveland Plain Dealer site — ran forums on selected topics that ran in the online version only. Only the New York Post failed to venture beyond story reposts.

While larger papers are developing diverse web sites, other papers with smaller budgets and staffs find themselves merely reposting stories from that day's paper — or not making an online presence at all. Such is the case with the vast majority of newspapers in Indiana.

V. THE HOOSIER STATE: WHAT'S HAPPENING?

Of the 70 daily newspapers in Indiana, only 26 maintained web sites as of February, 1997, according to a Newspaper Association of America listing. Of those, only one — The Indianapolis Star-News site — appeared to make changes to its site

more than once a day.

If anything, web sites run by newspapers were tied to promotions run by local Internet Service Providers. Newspapers in Anderson, Fort Wayne, Indianapolis and Muncie all had advertisements for local service providers tied into their sites.

Meanwhile, some of the smaller papers on the web, such as the New Castle Courier-Times and the Wabash Plain Dealer, featured layouts nearly identical to each other. Since both papers are owned by a common company (Nixon Newspapers), it is assumed that newspaper headquarters provided its subsidiary newspapers a common form to follow in web format.

No newspaper in Indiana has chosen to charge for access to web publications, although advertising is starting to make a presence on individual sites. Display ads, similar to those found at larger sites, are making a presence at the Indianapolis, Fort Wayne and Evansville sites. Classified ads, meanwhile, are finding a more diverse audience among smaller newspapers, namely in the form of reposts from the print version.

Information on web use, such as the number of "hits" per day at sites, was unavailable.

VI. CONCLUSIONS

There seems to be a dichotomy forming between large and small newspapers in terms of web presence. Larger newspapers, those with more readers and creative resources, seem to be taking advantage of the web through the availability of national advertising dollars. Small newspapers, with little or no ad revenue available, either avoid the web entirely or simply repost news from the printed version with little additional information.

As far as the necessity of a presence on the Internet, the positives outweigh the negatives. Although papers, especially smaller ones, won't see much of a profit margin, the ability to access information from a remote computer will help broaden

a paper's readership base, as well as form a new market for advertisers.

Meanwhile, as customers seek out reliable sources of information, the idea of charging subscription fees for sites will become a prominent issue. While Andrews makes a credible point about a sense of reliability at sites that charge, there is no guarantee as to whether people will use that idea when it comes to news judgment. With the tremendous amount of sources available, people can easily find another news site once an area becomes restricted to fee-paying users.

As for the newspaper industry itself, there will always be a market for the printed product. While profit margins might fall, people will always buy a printed paper to read during the morning commute, over breakfast or lunch at a restaurant, or even while using the bathroom. Also, there will be people who prefer newsprint over the computer terminal, as well as people who cannot afford the technology or are reluctant to use computers. As long as newspapers remain inexpensive to the consumer, people will buy the printed product.

To sum up the issue of the worthiness of newspapers and their involvement on the World Wide Web, the opportunities for expanded revenue, readership and expanded means of storytelling are well worth considering. While profit margins, especially at smaller papers, might not prove to be a bonanza early, a web presence can help newspapers make the transition to the 21st century.

Appendix 1: Web sites among the USA's top 25 newspapers

<u>paper</u>	<u>circ</u>	<u>site</u>
Wall Street Journal	1763140	http://www.wsj.com
USA Today	1523610	http://www.usatoday.com
New York Times	1081541	http://www.nytimes.com
Los Angeles Times	1012189	http://www.latimes.com
Washington Post	793660	http://www.washingtonpost.com
New York Daily News	738091	http://www.mostnewyork.com
Chicago Tribune	684366	http://www.chicago.tribune.com
Long Island Newsday	634627	http://www.newsday.com
Houston Chronicle	541478	http://www.chron.com
Detroit Free Press	531825	http://www.freep.com
Dallas Morning News	500358	http://www.dallasnews.com
Boston Globe	498853	http://www.boston.com
San Francisco Chronicle	489238	http://www.sfgate.com
Chicago Sun-Times	488405	http://www.suntimes.com
Philadelphia Inquirer	469398	http://www.phillynews.com
Newark Star-Ledger	436634	http://www.nj.com
New York Post	413705	http://www.nypostonline.com/
Cleveland Plain Dealer	396773	http://www.cleveland.com/
Minneapolis Star Tribune	389865	http://www.startribune.com/
Miami Herald	383212	http://www.herald.com/
San Diego Union-Tribune	379705	http://www.uniontrib.com/
Arizona Republic	365979	http://www.azcentral.com/
Detroit News	354403	http://detnews.com/
St. Petersburg Times	349874	http://www.sptimes.com
Orange County Register	349874	http://www.ocregister.com

sources: The 1997 World Almanac and Book of Facts, Newspaper Assn. of America

Appendix 2: Indiana newspapers on the World Wide Web

<u>newspaper</u>	<u>daily circ.</u>	<u>web site</u>
Anderson Herald Bulletin	32369	http://www.indol.com/tp.html
Auburn Evening Star	8257	none
Bedford Times-Mail	14690	www.tmnews.com/
Knox County Daily News	2416	none
Bloomfield Evening World	3478	none
Bloomington Herald-Times	30464	none
Bluffton News-Banner	4995	none
The Brazil Times	5315	www.nixonnews.com/news_ex/
Chesterton Tribune	4855	none
The Daily Clintonian	5448	none
Columbia City Post & Mail	4035	none
Columbus Republic	21679	none
Connersville News-Examiner	9187	none
Crawfordsville Journal Review	11401	none
Decatur Daily Democrat	5927	http://www.decaturnet.com/paper/index.html
Elkhart Truth	27338	none
Elwood Call-Leader	3679	none
Evansville Courier	75000	http://www.evansville.net/newsweb/
Fort Wayne Journal-Gazette	62889	http://www.fortwayne.com/jg
Fort Wayne News-Sentinel	53144	http://www.fortwayne.com/ns
Frankfort Times	7608	http://www.nixonnews.com/ftimes
Franklin Daily Journal	17158	none
Gary Post-Tribune	71113	none
Goshen News	16450	http://www.goshennews.com
Greencastle Banner-Graphic	6040	none
Greenfield Daily Reporter	8892	http://www.iquest.net/~brodt/greenreporter.html
Greensburg Daily News	6386	none
Hartford City News-Times	2210	none
Huntington Herald-Press	7893	none

Source: Newspaper Association of America

Appendix 2: Indiana newspapers on the World Wide Web

<u>newspaper</u>	<u>daily circ.</u>	<u>web site</u>
Indianapolis Star-News	231423	http://www.starnews.com
Jasper Herald	12763	none
Jeffersonville Evening News	12252	none
Kendalville News-Sun	8190	http://www.noblecan.org/~kpc
Kokomo Tribune	27111	http://members.aol.com/ktonline/index.html
Lafayette Journal and Courier	37993	http://www.jconline.com/
LaPorte Herald-Argus	13252	none
Lebanon Reporter	7132	none
Linton Daily Citizen	4664	none
Logansport Pharos-Tribune	13708	none
Madison Courier	9701	none
Marion Chronicle-Tribune	20610	none
Martinsville Daily Reporter	8301	none
Michigan City News-Dispatch	14197	http://www.nixonnews.com/news_dispatch
Monticello Herald Journal	5995	none
Muncie Star Press	36500	http://www.thestarpress.com
Munster Times	67911	http://www.calumet.com/newsA.html
New Albany Tribune	11813	http://www.tribnews.com
New Castle Courier-Times	12206	http://www.nixonnews.com/ctimes/
Noblesville Daily Ledger	9322	none
Peru Tribune	7200	http://www.nixonnews.com/ptrib/
Plymouth Pilot-News	7120	none
Portland Commercial-Review	4889	none
Princeton Daily Clarion	6182	http://www.pclarion.com
Rensselaer Republican	3620	none
Richmond Palladium-Item	19782	none
Rochester Sentinel	4744	none
Rushville Republican	4150	none
Seymour Daily Tribune	9479	none

Source: Newspaper Association of America

Appendix 2: Indiana newspapers on the World Wide Web

<u>newspaper</u>	<u>daily circ.</u>	<u>web site</u>
Shelbyville News	11420	http://www.shelbynews.com
South Bend Tribune	86872	http://www.sbtinfo.com
Spencer Evening World	3570	none
Sullivan Daily Times	4721	none
Terre Haute Tribune-Star	34906	http://www.tribstar.com
Tipton County Tribune	2730	none
Valparaiso Vidette-Messenger	15415	none
Vincennes Sun-Commercial	14047	none
Wabash Plain Dealer	6987	http://www.communinet.org/nixonnews
Warsaw Times-Union	12844	http://www.timeswrs.com/HOMEPAGE.HTM
Washington Times-Herald	10047	none
Winchester News-Gazette	4280	none

Source: Newspaper Association of America

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