

Chapter 6

Impact on the media

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The fast-evolving information and communication technologies of this decade offer a wider and wider range of choice to media consumers. The number of media offerings has been increased to such an extent that the information rich are experiencing real cases of information overload, and this trend has proved to be a bane for many media owners among whom insecurity is commonplace, because the new and changing technologies create uncertainties which may not be clarified in the near future. Nevertheless, for both media owners and consumers, quickly-evolving technologies signal the arrival of unlimited possibilities for innovation and growth.

CONVERGENCE AND GLOBALIZATION: IMPACT UPON MEDIA OWNERS AND CONSUMERS

Two words, 'convergence' and 'globalization', simultaneously arouse both hope and fear among media owners and concerned consumers of information. Convergence implies the dismantling of boundaries between the main types of media; and globalization breaches political borders and gives rise to international media organizations, which operate free from local supervision. Convergence and globalization are the result of digital technologies operating together with satellite broadcasting systems. Since media affect the lives of a majority of people, these two phenomena will have far-reaching consequences.

These are both disturbing and exciting times for media owners and consumers. The new technologies present them with opportunities to reinvent the industry if they so wish. If the choice is not to innovate but instead to consolidate, the new technologies are also making tools available for minimizing costs and maximizing efficiency.

Integration and expansion

The increasingly interconnected nature of the mass media industry has encouraged integration in a complex variety of reciprocal connections. The first set of logical mergers were between different types of media, such as television with radio and the press to create multimedia conglomerates. Mergers of media entities across countries and regions also occurred in order to attain the critical business strength needed to reach global markets.

A few hardware manufacturers made strategic moves to purchase media houses producing films, music and other media products. The strategy has paid off in recent years through co-ordinated releases of new generations of hardware, such as Digital Versatile Disk (DVD) players, digital television receivers, and digital music recording devices, together with media products and software to be played back on these new devices. The synergy is mutually beneficial. There would have been no demand for the hardware had there been a lack of attractive media products to play on the devices. Without the devices, the media companies would not have been able to launch a new generation of both old and new releases which help to produce a new stream of revenue for the existing libraries of intellectual properties owned by these media companies.

In an interesting new twist to integration and convergence, a major television sports broadcaster has mounted a takeover of one of the most famous soccer teams in the world. The business strategy is to acquire full control of broadcast and merchandising rights through the outright purchase of the team. If this proves to be a profitable move, it is not impossible that media companies may begin to purchase properties as diverse as universities and restaurants in order to secure publication copyright for scholarly titles and courses, and broadcast licences for cookery programmes.

There are two sides to integration and con-

vergence. The case against concentration of ownership can be seen within the printing sector in the United States, where extensive research shows that the twelve largest newspaper conglomerates control almost 50% of all circulation in the largest market for news in the world (Gitlin, 1996). In book publishing, nearly every one of the major commercial publishing companies has also been bought and assimilated into larger businesses, while independent bookstores are being forced out of business by a handful of powerful national chains.

On the positive side, the sale of some cable television companies, again in the United States, helped raise much-needed financial investment to upgrade distribution systems. The merger of Cable News Network (CNN) with the Time Warner group led to the pooling of extensive complementary intellectual properties, particularly in politics, which has resulted in service on the Internet which offers more depth and data than either company alone could have provided in the print and television media (Rattner, 1996).

The expansionary trends of the media conglomerates, coupled with media technologies which ignore political borders, have forced government-owned media organizations in newly developed and developing countries to respond. Within Asia, the response has generally been to privatize state-owned media in an effort to make them more competitive and attractive to domestic audiences. However, the privatization has been structured in such a way as to protect, preserve and empower traditional cultural values and maintain key government controls at the same time (Richstad, 1998). The Association of South-East Asian Nations (ASEAN) plans to launch a regional direct satellite television broadcast channel, but these plans have been delayed by the financial problems affecting the region.

Cross-selling

When several large media organizations merge, they create media giants with huge audiences. This is an

invaluable asset which helps in maximizing advertising revenue, the life-blood of media. The merger also pools strategic market information, such as subscriber and advertiser databases which are used to cross-sell media products and advertising across the organizations within the merged group.

Direct selling

This is probably the showcase innovation of the private sector on the Internet, and Amazon.com is the current undisputed star in this area. Amazon began by selling books over its Internet site and subsequently added music CDs to its virtual bookstore. A strictly e-commerce company, it has captured the imagination of media organizations because it has so far dealt exclusively with media products. Indications are that it will diversify rapidly to include a large variety of consumer products. Every media company with tangible products must at some time have reviewed Amazon's methods for possible emulation. The arithmetic of direct selling to consumers worldwide without having to incur high distribution and sales discounts is an irresistible idea, and an increasing number of media organizations with such product offerings have launched websites to test the feasibility of an Amazon-like sales outlet.

Attracting less public attention, but perhaps more exciting in its technological concept, are the direct sales facilities of newspapers, journals, bulletins, and electronic book publishers. Amazon uses the Internet only to promote and process payment for a product before resorting to fairly conventional means for delivering a traditional tangible media product to the consumer. In contrast to this, specialized publishers are offering articles and information from databases for instantaneous downloading over the Internet immediately after a payment has been made at the site. Book publishers will be interested in the mass consumer response to several electronic book (e-book) devices introduced recently into the market and which approximate the size and feel of a book. They lend

themselves to the direct sales of books bought and delivered over e-commerce systems. The North American book distributor Barnes & Noble has negotiated with various publishers to offer more than 1,000 titles of books for downloading into the devices which have a capacity to store anything from about 1,000 to 500,000 pages at any one time. The e-book is an extremely attractive proposition to book publishers because they do not have to commit expensive print-runs and warehousing expenses up front; the risks are therefore minimum. This may encourage publishers to accept a larger number of manuscripts for publication. It is likely to facilitate the release of traditionally short-run titles, which have been rejected in the past because they were not viable as expensive paper editions. The e-book is a viable alternative to currently available publish-on-demand technology, which deploys high-speed photocopying machines linked to collating and binding machinery.

The music industry may be on the verge of making similar direct sales. A new device which downloads and stores audio digital recordings from the Internet for repeated playback by consumers was cleared for public sale, following a court hearing in California (USA) to determine if such a device threatened the preservation of intellectual property rights. The legal endorsement for the device has set the stage for music to be sold directly to consumers, a song or 'cut' at a time, rather than as a compilation on longer-playing discs.

NEW BUSINESS MODELS, PRODUCTS, AND ECONOMICS

The evolution of a new generation of media technologies has presented the industry with many possibilities for developing new products and services. One of the key factors, which will help in identifying the final list of possibilities for sustained development, is the parallel evolution of business models applicable to these possibilities. The successful candidates must operate with a business model acceptable to the

consumers, and attractive enough to engage media operators. The private sector has long been the primary source for funding of media operations in North America, Europe, Latin America and parts of Asia. With the trend towards the privatization of state-owned media in developing countries, the importance of feasible business models has become critical in the determination of how technologies will be deployed, and what content and software will be offered.

Large audience base

This long-established business model continues to dominate for traditional mass media such as radio, print and television. It has also become one of the most important models for Internet-related operations where 'portal' sites offering search and directory services to the vast World Wide Web have drawn the largest number of users and attracted the keenest interest of investors and entrepreneurs. As with most broadcast organizations, portal sites do not charge for their services but instead derive revenues by selling advertising. In this model, the number of people served by a particular Web site or broadcasting station is crucial in determining the pricing of its advertisements, and eventually its revenue. The same applies to the print media products, which are often priced for the recovery of production and distribution costs only, while profits and creative costs derive from the sale of advertising space. These numbers will take on added importance when members of the audience become customers and shoppers on interactive television and electronic commerce Web sites. New audience-tracking technologies and sophisticated audience research methodologies enable these numbers to be desegregated into groups with a high propensity to purchase certain goods and services. These advances are a boon to advertisers and will pose a challenge to media operators, who, in the past, were required simply to broadcast advertisements for large groups. The tougher requirements are already apparent in advertising at Web sites where operators are

required to broadcast advertisements in the style of banners at the top or bottom of specified Web pages, and the cost of advertising was determined by the number of people accessing the page and seeing the advertisements ('eyeball exposure'). This simple formula became a little more complicated when the cost was computed on the basis of the number of people who clicked on the banners and visited the Web site linked to the advertisements (referred to as 'click-throughs'). The third formula which is evolving will very likely be based on a sales commission on the actual business transacted as a result of exposure, click-throughs and other services rendered at a particular Web site or page.

Electronic commerce

This model has captured the imagination of the industry as the most appropriate for the Internet with Amazon.com as the premier prototype company. Amazon has demonstrated both the potential and the problems of this model. Although it is popularly cited as the most successful electronic commerce company, it has not shown a profit since it started. On the contrary, Amazon consistently incurred losses until the end of 1998. Researchers who have tracked the company's exponential growth blame the losses on high operating costs. Its economics also reveal a staggering scale of business. One study estimated that Amazon must generate \$1 billion in annual sales just to break even (Junnarkar, 1998). The electronic publishing model has been given a boost with the introduction of secure electronic transaction software and systems which permit payments for purchases made over the Internet to be securely debited from credit card accounts. Further progress is expected in the near future when 'smart cards', which enable payment purchases using secure computer codes, are launched worldwide.

Subscription access

Subscription access was widely thought to be a promising model for the electronic publishing of

newspapers, magazines, journals, and newsletters. The typical electronic subscription begins when a person makes a lump sum payment to the publisher, who then provides the subscriber with a unique password, which then permits access to each new edition at a Web site.

Although the model was based on very sound logic, it was not well received by people on the Internet. For the present, it appears that the founding principle of the Internet for the free sharing of information still persists. Major content providers have indefinitely postponed plans to charge for access to their sites. To replace this, some providers require visitors to their Web sites to register themselves, or encourage them to click on the advertisement of a corporate sponsor, as a kind of surrogate payment. This has caused extensive revisions in the business plans of media companies started for the exclusive purpose of publishing and selling information over the Internet.

Conventional media, such as television news networks, newspapers, and magazines, which extended their dissemination by recycling selections from their products on the Internet, have enjoyed more prosperity (see box 6.1, Newspapers on line). Their sites regularly clock up millions of visitors each month who in turn each read several Web pages and help to generate a total of many millions more 'page views' for the sites. While people visiting the sites do not pay for their visits, the media organizations running the sites benefit in several ways: firstly, by promoting or cross-selling their flagship on printed or broadcast products via free access to excerpts at the Web site; secondly, by offering archival information such as previously published articles or transcripts of old broadcasts for sale through an automated system of database searches and electronic commerce; and lastly, by exposing people to this new outlet for their products and developing a global audience for future sales of a new generation of products and services. The *Economist* and *The Wall Street Journal* now publish simultaneously on paper and on the Internet.

Box 6.1 → Newspapers on line

There are many sites on the Internet that provide news. One type are the special Internet news sites, often provided by the Internet Service Providers (ISPs). Others are sites maintained by already-existing newspapers as a complement to the printed product. One can find daily newspapers and news-oriented periodicals from almost every country in the world, representing a mixture of national and regional/local press, as well as news targeting specific groups in terms of language and/or ethnic belonging. One significant result of this development is that, whereas the possibilities of access to traditionally disseminated press were limited, especially concerning regional and local press, news via the Internet means worldwide dissemination. Some examples of estimated number of newspapers and periodicals available by country of origin are given in Table 6.1.

Table 6.1 → Estimated number of on-line newspapers/news magazines (daily, non-daily and periodicals) for some selected countries, March 1999

Country	No of papers
Developing countries	
Angola	3
Botswana	2
Brazil	81
Egypt	11
Malaysia	11
Pakistan	23
Venezuela	18
Developed countries	
Australia	80
Denmark	24
Lithuania	2
Slovenia	6
Spain	35
Yugoslavia	15

Source: www.webwombat.com.au/intercom/newsprs/index.htm

The former provides subscribers to the printed product and free access to the Internet edition. The latter sells subscription access to both versions. Some newspapers have used their Internet editions to enhance the attractiveness of their classified advertisements by offering package deals, which place such advertisements simultaneously on both printed and Internet editions.

As a result of the financial crisis of 1997/98, media organizations throughout Asia, Latin America and Russia are struggling to stay solvent. The media in these regions have been hit by high increases in repayments of bank loans and other forms of business financing, increases in the price of newsprint, and significant drops in advertising revenue, as companies have trimmed their advertising budgets as part of cost-cutting measures.

Internet services providers have suffered from the crisis as well, because the values of local currencies have fallen in relation to the US dollar in which the cost of telecommunications connections are calculated. At the same time and for the same reason, the cost of imported networking hardware and software has also increased. Many media companies will therefore consider the new technologies with an eye on costs and their potential contribution to cost cutting.

SEIZING NEW OPPORTUNITIES IN DEVELOPMENT

The tendency to use new technologies to meet commercial objectives is problematic for people and regions without the necessary financial resources to attract companies to fulfil their needs. The challenge is made harder by the need for stable telecommunication links and electricity to power nearly all the new technologies. Both are in short supply in the poorest regions.

The case of developing countries illustrates the way in which technology evolves and is diffused at

different speeds across the world. Whereas new technologies are represented by state-of-the-art digital innovations in the developed world, for parts of the developing world telephones, television or even radio may be the latest technologies. It is in this context that two recent innovations in radio broadcasting represent important advances in the medium.

The clockwork (or wind-up) radio is the first. Communication specialists in development have been aware of the problem faced by isolated communities in obtaining dry-cell batteries to power radio receivers for several decades. Crystal-sets and solar-powered receivers have not proved to be entirely successful. The clockwork radio is powered by a patented power source, which with a few minutes of winding-up will keep a receiver playing for about an hour. It is an exciting invention which has been adapted to work on lap-top computers and other devices, which previously depended on batteries for electrical power. For the present, the relatively high-costs of these radio sets prevent their extensive diffusion across the developing world.

The other innovation is at the broadcaster's end. UNESCO has taken the lead in helping to develop affordable low-power radio transmitters for operating community broadcasting services. These transmitters are assembled from generic components by local technicians, who also assist with maintenance. Such services facilitate the decentralization of media control to the community. They help promote participatory communication, which empowers communities, and support the planning and implementation of sustainable development programmes. The main hindrance to the spread of this technology is legislative. Most developing – and even developed – countries discourage community broadcasting by limiting access to radio frequencies and to a broadcasting licence.

A classic example of a new technology converging to support an old predecessor is the technology to stream sound over the Internet. This is the developed world's version of the developing world's

evolution towards community broadcasting. The technology is very affordable at both ends. People can receive such Internet radio broadcasts with a relatively low investment while broadcasters can be 'on the air' broadcasting literally to the whole world at very minimal cost.

These technologies represent an extremely small fraction of the total number of innovations introduced into the media industry. The developing world with its highly limited purchasing power has sustained minimal research and development efforts to increase their access to relevant content and channels of mass communication. A study in the Philippines found that where privatization of media has been the norm, programming is not meeting the needs of local populations (Kenny, 1996). This sentiment may extend quite widely across the developing world.

Transmission frequencies are a very valuable resource in some areas of the world where finding a frequency for broadcasting to minority groups is a daunting uphill battle, since regulatory authorities and established media companies have vested interests to protect. The introduction of digital television broadcasting technology with the capacity to place four channels in the same space that one analogue channel used to occupy, will soon make plenty of new broadcasting space available. A significant amount of this newly freed-up space should be reserved for minority interest broadcasting, which is now limited. Developing countries will probably have to wait for several years before the cost of digital technologies reaches an affordable level. The early users, namely the developed countries, should therefore establish a precedent for safeguarding minority interests and those of disadvantaged groups by reserving such open digital spaces for them. Spaces must be held in trust, not only for minorities, but also for the common good in areas such as education, science and culture, which are not very profitable, but are socially vital.

NEWS AND NEW EXPECTATIONS

The latest technologies, with their capacities to move multimedia content anywhere in the world in a matter of seconds, provide the perfect tool for gathering and disseminating news. They have become available at a time when the demand for news is rising rapidly, fuelled by the globalization of trade and national economies. The increasing demand is not only for a greater quantity of news, but also for higher speeds in reporting. This in turn presents developers of technology with demands to increase further the capabilities and speed of technologies creating a powerful iterative spiral, which will lead to even more, exciting technologies.

The demand for news worldwide is obviously not uniform. Television ratings are a good yardstick by which to gauge demand. News dominated the top ten television shows in the United States; soap operas of different origins seem to be the most popular in many other countries such as Brazil, China and South Africa (*The Economist*, 1998). The demand for news over the Internet appears to be more consistent, with nearly all news sites registering the most number of visitors and Web pages downloaded (page views). Sites operated by newspapers around the world commonly serve millions of page views per month. While most newspapers continue to provide only text and static images on their Web sites, radio, television and other integrated media conglomerates now offer multimedia content which includes text, and sound and video clips of headline news items. Several financial publications operate Web sites with access to constantly updated databases and expert systems software to work out investment computations and projections.

The exponential growth of the Internet as a channel for distributing news can be seen in the meteoric growth of Microsoft National Broadcasting Company (MSNBC), a joint venture between Microsoft and the National Broadcasting Company (NBC) in the United States. By the first quarter of 1998, the news

site served an average of 300,000 users a day with the occasional peak of 900,000 users. Together, they read 200 million pages a month. Measured by reach, it is the fifth largest daily newspaper in the United States. The top four Internet news sites in the country, MSNBC, USA Today, CNN and the American Broadcasting Company, collectively serve up 700 million pages of news every month (Brown, 1998).

The twenty-four-hour news cycle

Direct satellite broadcast television news channels and the Internet benefit people around the world who want and need to have constantly updated access to news at all times of the day and night. This has caused an insatiable demand for the latest news, which has in turn created the twenty-four-hour news cycle. News operations in the past were governed by deadlines fixed by printing schedules, in the case of newspapers and magazines, and airtimes for conventional radio and television news. Now that the audience is global, every moment of the day and night is the deadline. All news programming is by definition perpetually incomplete and in a state of being constantly updated. The concept of 'the edition' has been replaced by devices such as 'breaking news' when regular programming is interrupted in television broadcasts, to show raw, unedited, live coverage about a still-evolving news item. On the Internet, a similar device is the 'latest' button, which provides a link to a usually brief write-up of a news event in the making.

Instant journalism

The race to be the first on the air or the Internet with the latest news has created an approach to news reporting which concentrates on the immediate, the gathering of eye-witness accounts, and a follow-up of the event as it unfurls and draws to a conclusion. Attention to analytical writing is on the decline. The twenty-four-hour news cycle, and the quickly changing news agenda discourages reflection, research and analysis which take up time, and time is what

the editorial departments no longer have to spare. The result is sometimes news reporting which is disconnected from history and the broader geopolitical context. Merrill Brown, editor-in-chief of MSNBC, is mindful of the shortcomings of journalism on the Internet: 'Those of us producing for the Internet haven't always been as thoughtful as we might about putting today's incremental developments into perspective' (Brown, 1998). Andrew Heyward, the News President of Columbia Broadcasting System (CBS), one of the dominant North American television networks, is equally conscious of television's shortfalls. He identified 'the seven daily sins of television news' as imitation, predictability, artificiality, laziness, oversimplification, hype and cynicism (Heyward, 1997).

Minimizing costs

Although not as profitable as the owners would like, the media is now big business. During the concentration of ownership, large financial investments were made; owners are now eager to recover them. At the same time, profits at many media organizations have shrunk. Together, these considerations have driven media organizations to cut costs and this has harmed the quality and diversity of news services. Among the elements which have been slashed are foreign news bureaus and the amount of original reporting undertaken (Hickey, 1998). News editors are also less inclined to dispatch their own reporters, photographers and camera crews to cover an event, preferring instead to rewrite wire service stories and tap into news footages from large television news agencies.

The impact of this trend is a significantly reduced plurality of perspectives, especially where international news items are concerned. The same television news clips are broadcast by stations around the world, while the same wire service dispatches are carried in the newspapers. This provides the handful of international news agencies which feed the media

organizations around the world with an oligarchic grip on the flow of news and views. This phenomenon is called 'consonance'. Research has shown that the further the geographic origin of a news story from the editorial headquarters of a media organization, the higher the level of consonance (Carroll et al., 1997).

Accuracy of information has also suffered as a result of cost-cutting. Reduced resources to research and confirm facts often lead to the release of not completely accurate news and content. Because of the concentration of media organizations, the effects of these errors are sometimes multiplied across several types of media.

Participatory journalism

The Internet has helped to inject a level of participation in news commentary that did not exist in the past. This has taken the form of on-line polls of audiences and readership using customized software which operate at media Web sites. Although the samples reached in such polls are obviously not always representative, they are nevertheless a good beginning in getting the audience involved in developing opinions about issues. Current methods of polling offer audiences a limited number of choices, identified by the media, which may not always reflect the full spectrum of opinion. Perhaps more useful are facilities at certain Web sites for visitors to post their comments. The Internet version of a phone-in comment is tremendously popular with interactive radio stations. A few international radio and television broadcasters have also started to use audience postings of comments at Web sites and e-mail, as a channel for the audience to participate in live panel discussions. The low cost of using the Internet by the audience permits this form of live participation at the global level on a sustained basis and, if facilitated effectively, will contribute towards enriching the diversity of perspectives in all types of media.

In participation of a different sort, newsmakers now use the Internet to reach out directly to the

audience, bypassing the media. Court judgements have been posted directly on to the Internet, as have copious copies of original reports of powerful government-appointed investigating authorities. Such events are being multiplied in a myriad of other events, ranging from the birth of a child to an expedition on Mount Everest.

Instrument of freedom

Quick-thinking editors and their lawyers have found an interesting innovative use of the new technologies in the defence of the freedom of the media. United States media organizations subpoenaed for information in their possession, and faced with prospects of losing the legal challenge (and the principle of freedom of expression which goes with it) when no important information is involved, have been known to publish photographs or broadcast footages so that they can honestly claim that they have not surrendered any unpublished material to the prosecutors. The new technologies allow news stories and pictures to be rushed out into the public domain over the Internet. Television companies, faced with the need to place uninteresting and insignificant footage in the public domain, have been known to broadcast this material in the middle of the night using an idle satellite (Gartner, 1998)!

New vulnerabilities

The danger of spreading unreliable information via the new technologies does not emanate solely from the information providers. The Internet is particularly vulnerable to interference from third parties. Skilled and determined computer hackers have been known to gain unauthorized access to all sorts of information serving systems to make disruptive, and sometimes malicious, alterations to the information posted. A stunning example of this occurred at the Web site of *The New York Times* on a Sunday in September, 1998, when a community of hackers mounted a coordinated attack. Technicians at the newspaper fought

with the hackers for the control of the system before being forced to shut down the Web site for nine hours (Shutz, 1998). The hackers launched the attack to retaliate against a reporter at the newspaper for having written a story about an imprisoned hacker which they had found unacceptable.

CONCLUSION: TECHNOLOGIES FOR THE NEXT MILLENNIUM

There is every indication that the exciting technological changes which have taken place over the past decade are just the beginning of an accelerated phase in the evolution of the media. The near future may possibly witness several trends.

People will 'de-link' from their personal computers. Innovations which will decentralize the access to new forms of digitally-encoded media content, away from the personal computer, may be introduced. Dedicated 'set-top boxes' and devices which connect to the television set, radio receivers, automobiles, and telephone handsets, which will permit ready access to new media content, will probably be developed and sold on the market.

The keyboard and mouse, two devices which many consumers find difficult to use, may be replaced by voice-activated control devices or greatly simplified key-pads or remote control units. Software, which acts as the interface between users and media-accessing devices will be further refined so as to become truly user-friendly and stable. All of this should facilitate increased access to the new hybrids of media products which have already been offered, or will be offered in the future to the consumer.

Delinking will also take place in terms of the portability of equipment; the smallest device for the present is the palm-top, which will fit quite conveniently into a large pocket. The next stage will be wearable devices, which may resemble present-day watches. They may be the ideal instruments for accessing financial information services, travel and

leisure guides, weather reports, and e-mail connections. Such wearable technologies present a myriad of possibilities when developed and used in connection with global cellular connections being provided by telecommunications companies.

One of the main challenges in developing wearable technology, capable of connecting to a cellular network, is the design and manufacture of miniature batteries, or alternative power sources, which can power data wireless modems and other components in these devices. One of the main obstacles to widespread use will be the cost of the devices, batteries, telecommunication links, and the price of media services and products. When such devices, services and products become available, market forces will no doubt put them within the reach of wealthy consumers who can afford the high prices normally associated with new products. This will be an irony, because the people who will probably need these devices most urgently, and stand to gain the most from them, are in isolated communities in the developing countries with no other access to media or channels of communication, and for whom the latest technologies seem best suited. This will be a challenge very much worth addressing for all managers and practitioners in the years to come, as they plot the future paths of the industry.

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