How to cite this article in bibliographies / References

R Salaverría Aliaga, MP Martínez-Costa Pérez, J Breiner (2018): "Map of digital news media at Spain in 2018: quantitative analysis". *Revista Latina de Comunicación Social*, 73, pp. 1034 a 1053.
http://www.revistalatinacs.org/073paper/1295/54en.html
DOI: 10.4185/RLCS-2018-1295en

Map of digital news media in Spain in 2018: quantitative analysis

Ramón Salaverría Aliaga [CV] [] [] Associate Professor. Universidad de Navarra (Spain). rsalaver@unav.es

MP Martínez-Costa Pérez [CV] [] [] Associate Professor. Universidad de Navarra (Spain). marcosta@unav.es

J Breiner [CV] [] [] Visiting Professor. Universidad de Navarra (Spain). jbreiner@unav.es

Abstract

Introduction: On the verge of reaching their first quarter of a century, the digital news media in Spain continue with their unstoppable growth. This research presents an updated map, as of March 2018, of digital news media in Spain. **Methodology:** It identifies and analyses a sample including 3,431 digital media, identified thanks to a thorough review of directories of the media industry, as well as the use of several advanced search strategies. This dataset provides the largest sample of Spanish digital publications so far. **Results:** Among the media studied, aspects such as the current status of these publications (either active or inactive), number and type of platforms where they are published, news topic, scope, territorial distribution, publishing languages, ownership and business model are studied. **Discussion and Conclusions:** The result is the most updated and comprehensive, although not exhaustive, map of digital news media in Spain, which portrays these publications as a highly consolidated and expanding medium.

Keywords

Digital journalism; digital media; media markets; typologies; Spain.

Contents

1. Introduction

Since the middle of the 1990s, as in many other countries, Spain experienced a steady growth of digital journalism (Gómez-Borrero, 2010; Micó, 2006; Salaverría, 2017). After nearly a quarter century, these digital media have diversified, first, because of changes in technology (Cabrera, 2013) and, more recently, thanks to innovations in the production, distribution and commercialization of news contents (Sádaba et al., 2016).

Recent years were characterized by an acceleration of these disruptive changes (Roitberg & Piccato, 2015), marked by new models of production and consumption of information, as well as a transformed relationship with the public, thanks to the expansion of social networks (Campos Freire, 2008) and mobile platforms (Aguado & Castellet, 2013; Arroyo, 2012). Spanish digital media have included new journalistic and non-journalistic entrepreneurships, both local and regional, as well as national and even global. And they have done so both in the field of general news as well as in the multiple specialized thematic areas. Therefore, it is necessary to identify and classify these digital media so that the current sector in Spain could be profiled in a systematic manner.

However, measuring this evolution, has proved to be an especially arduous task. Unlike the traditional media (press, radio, television, news agencies), which have relatively exhaustive directories of outlets, the sector of digital media barely has reliable quantitative references available. Neither public institutions, the news media industry, nor universities have compiled a general directory and updated all active digital media in our country. Existing studies usually limit themselves to specific case studies that, even though they describe media in particular, they do not profile the full dimension of the market (Salaverría, 2016b).

The most recent list of Spanish digital media, admittedly limited, was the census of native digital media produced in 2015 by the Observatory on New Media (www.nuevosmedios.es). This directory included 812 native digital media startups in Spain, besides some other hundreds in Latin American countries. However, precisely the fact that it is limited to digital native media means that even this valuable census leaves out most of the active digital media in our country; that is, non-native digital media that were outgrowths of pre-existing journalistic brands in press, radio, television and agencies.

Thus, many questions are still waiting for answers. How many digital media are active in Spain today? How are they distributed throughout the country? What is their business profile? In what languages are they published? These and other unknown variables can only be addressed by producing a census as exhaustive as possible of digital media in Spain that comprises all kinds of digital news media. This is the objective of this study.

2. Theoretical Framework

The evolution of digital journalism or cyberjournalism has progressed hand in hand with the expansion of the information society and changes in news consumption habits (López García, 2015; Meso Ayerdi, 2006; Yunquera Nieto, 2016). These changes have forced media companies to branch out on the internet and to "recognize in it the core territory of news in the XXI century" (Salaverría, 2016a:170).

The birth of digital journalism media in Spain dates back to 1994. In the spring of that year the digital version of the cultural magazine *El Temps* saw the light of day and, some months later, online editions of two main newspapers appeared, *El Periódico de Catalunya* and *El Mundo*, all these through the private network Servicom (Díaz Noci, 2005; Salaverría, 2008). In 1995, the first publications were launched on the internet, first in a slow trickle and, shortly after, in a deluge (Salaverría, 2016a). It wasn't long until pioneering researchers of this discipline published the first classifications of Spain's internet news media. The first one was by Díaz Noci and Meso Ayerdi (1997). Aware of the leading role that the internet was assuming in the spread of information and the fast growth the sector experienced in just a few years, they produced an initial catalog of publications. This study classified web media based on their traditional parent organization— depending on whether they were newspapers, magazines, agencies and groups of press, radio or television— and their topics —general or specialized news. In addition, it included a list and description of websites of press offices, kiosks of electronic national and international press, university communication departments, and search servers, among others, to complete the landscape of resources related to journalism. This directory entailed, in brief, a first exploratory approach to a sector that soon incorporated new titles and started to show some casualties.

Ten years after the birth of the first digital media, when practically all Spanish newspapers already had a digital version, an extensive study about the status of digital media in Spain was published, a result of the collaboration of researchers of several universities (Salaverría, 2005). That study showed, among other things, a general census of digital media in the whole country: 1,274 active media were registered, classified by their media of origin, geographic distribution, and thematic specialty. The distribution of these media was as follows:

Table 1. Parent company of Spanish digital media in 2005 (N=1,274)

Parent media	Number of media	%
Newspapers and magazines	695	54.6 %
Radio	352	27.6 %
Television	111	8.7 %
Native digital media and others	116	9.1 %
Total	**1,274**	**100.0 %**

Source: Salaverría, 2008, p. 375.

As can be seen here, in 2005 the media outlets with the greatest presence on the internet were print media (54.6%), followed by radio (27.6%), while digital natives at that moment represented a scant 9.1% of identified active digital media. The report showed that 40.27% (513) of digital media were of specialized information, while 59.73% (761) were general information (Salaverría, 2005: 51 y 64). This overview revealed that digital journalism in Spain experienced a process of “clear professional consolidation”, with the emergence of new media, new professional profiles, and new audiences, although without any stable business structure or defined payment model.

After the first decade of digital journalism in Spain, three challenges were still pending: finding a feasible business model (Gómez-Borrero, 2010; Casero-Ripollés, 2010), developing a complementary strategy between traditional and digital media (Campos Freire, 2010; López García & Pereira Fariña, 2010), and taking advantage of expressive possibilities of hypertextual, multimedia and interactive language of the internet to explore new forms of communication (Micó, 2006; Salaverría, 2008: 362).

Studies describing the second decade of digital media have been mainly of a qualitative character. López García and Pereira Fariña (2010), together with *Infotendencias* researchers, made an analysis of the situation of digital media in Spain, focused on the characteristics, processes and consequences of the convergence of the country’s media. The study, of qualitative methodology, made it possible to build on the challenges of the previous stage and analyzed the level of convergence and complementarity of platforms and languages in digital media. It also allowed the establishment of a baseline for the study of the evolution of the impact of convergence on productive and organizational processes of Spanish digital media (Cabrera, 2013), as well as the description and analysis of processes of innovation undertaken to confront changes in the media model (Sádaba et al., 2016). According to Salaverría, this second decade of digital media was marked by three factors: the boom of social networks, the diversification of digital media, and the impact of the economic crisis on the industry and the profession (2016a: 196).

These and other studies (Guallar, 2015; López García, 2008b; Domínguez & Pérez Colomé, 2012, 2013), show that digital media in Spain have reached their maturity and started their third decade with features that are very different from the market of non-digital media. López García (2015) emphasizes the dynamism the internet has shown in these recent years and how the evolution of audience, technology, and companies is making room for a new scenario of production, narratives, and distribution networks that was unthinkable back in the 1990s.

García Avilés and Arias Robles (2016) review the history of digital media by doing an analysis of the innovation processes that have improved production, organization and distribution of news content on the internet. Thus, they differentiate the following stages: 1) birth of the first newspapers and content production (1995-1999); 2) increase of advertising revenues and portalization (2000-2001); 3) increased adoption of multi-media and the bursting of the technological bubble (2002-2004); 4) adaptation of contents to the web (2005-2008); 5) arrival of innovation on the scene (2009-2011); 6) consolidation of innovation in contents and entrepreneurial journalism.

Salaverría (2016a: 206) also makes an optimistic assessment of these first two decades of digital journalism in Spain, which he qualifies as “wide, diverse and in expansion”, although the unresolved issue is still "finding a profitable and sustainable business model". In that respect, digital natives showed a greater capacity for adaptation, the emergence of some innovation laboratories suggests changes ahead (Sádaba & Salaverría, 2016; González Alba, 2017), and internet audiences are gaining importance: the internet ranks second among media in Spain with a reach of 75.7% according to data from the General Study on Media.

Although the bibliography and analysis about business models, digital entrepreneurs, and their impact on audiences is abundant, a general census of digital media in Spain had not been done since 2005. For this reason, the qualitative evolution of those media described in the studies referred to earlier cried out for a quantitative study that would enable the drawing of an updated map of digital media in Spain. Besides profiling the true dimensions of the digital journalism industry in our country, this empirical evidence would be useful to enrich typologies of digital media proposed over the years, and would allow the measurement of the degree of restructuring experienced by the media sector on the internet.

In short, a broad census, and therefore a statistically significant one, would allow the capture of an updated quantitative profile of Spanish digital media, while at the same time allowing the testing of the following four hypotheses guiding this research:

> H1 – Spanish digital media have experienced a significant growth and have been consolidated into the news media ecosystem, mainly on a local level, despite the crisis of traditional media.
>
> H2 – The territorial distribution of digital media follows demographic characteristics in such a way that the greatest number of digital media are concentrated in the most populated autonomous communities.
>
> H3 – General interest news predominates as the main topic in the beginning of this third decade of digital media, compared to the first years, in which many of the new media were specialized.

H4 – Although there is evidence of diversification of income sources, digital media, both emergent as well as consolidated, still depend mostly on advertising and sponsorship for funding.

To confirm these hypotheses, we developed a research project whose methodological model is detailed as follows.

2. Methodology

Using the typology of digital media built by Salaverría (2017), this work suggests their characterization based on the following criteria: 1) platform (web, tablets, mobile, or multiplatform), 2) periodicity (periodic, continuous or multitemporal publication cycles), 3) topic (general or specialized information), 4) reach (global, national, local or hyperlocal), 5) ownership (public or private), 6) authorship (individual or collective), 7) approach (journalistic or non-journalistic), 8) economic purpose (profit or non-profit) and 9) dynamism (static or dynamic). When designing and developing this database, the previous criteria were complemented with six additional descriptive variables: follow-up in social networks, funding sources, languages, years in business, type of company, and headquarters.

To produce the updated database of digital media in Spain, the baseline was the census of 1,274 digital media elaborated in 2005 by the researcher (Salaverría, 2005). Starting from this base, the investigation 1) reviewed registered media, identifying which continue active and which stopped operating; and 2) searched for new media launched after 2005 or that weren't registered in the first data base.

The exhaustive process of identifying digital media was carried out through various search strategies drawing on a variety of documentary sources. To begin with, we used specialized directories and sector reports, where complementary lists of digital media were found. Among the sources used for these searches were the following directories: Asociación Española de Editoriales de Publicaciones Periódicas (www.aeepp.com/lista-de-asociados); Observatorio de Nuevos Medios (www.nuevosmedios.es); Agenda de la Comunicación del Gobierno de España (www.lamoncloa.gob.es/serviciosdeprensa/agendacom); Asociación de Editores de Diarios Españoles (www.aede.es/asociados); Guía de la radio (www.guiadelaradio.com/provincias.html); Asociación de la Prensa de Madrid (www.apmadrid.es/nuevos-medios-lanzados-por-periodistas/); Asociación Española de la Radio Online (aeroasociacion.es); Asociación Española de Radiodifusión Comercial (www.aerc.es/quienes-la-forman/relacion-de-emisoras); Emisoras de radio españolas, radios online de España (www.emisora.org.es); Opennemas (www.opennemas.com/es/clientes); as well as thirty other regional entities and directories. In addition, we used different types of advanced searches with Google. For instance, we performed searches combining the term "news" with the name of the most populated municipalities of every province (in general, populations of more than 20,000 inhabitants, except the least populated provinces, where the threshold was reduced). As a result of these advanced searches, hundreds of digital media were found that did not appear in any of the lists or directories mentioned previously.

The tracking task was performed by a team made up of the researchers on the project affiliated with this research, supported for some months by an assistant who was trained and whose contributions were reviewed afterwards. The search of digital media was performed during the year 2017 and continues to be updated with periodic reports, as new digital media keep being launched or, on the other hand, disappearing. For the analysis in the present study, the database included 3,431 digital media, nearly three times larger than that of the largest previous census, the one of 2005, which registered 1,274 digital media (López García *et al.*, 2005; Salaverría, 2008). Despite the large size of the new sample, a fact that fully guarantees its statistical significance, it must be considered a non-exhaustive sample, since it is not possible to ensure that it contains all digital media in the country.

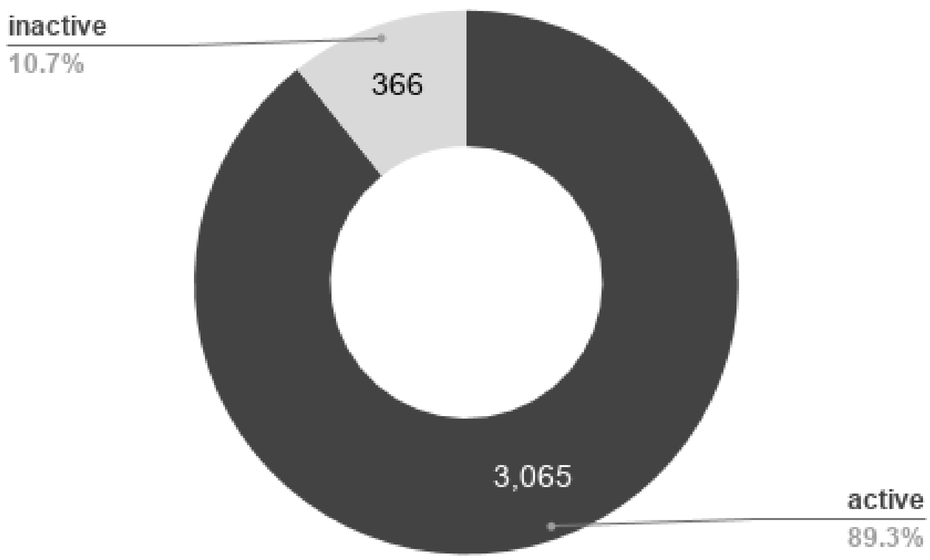
To code these 3,431 entries, we used a spreadsheet produced in Google Sheets and shared by codifiers. For each one of the digital media, the document consists of 73 variable columns, to which the codification registry data were added. Part of these data are updated metrics of the activity of these media on social networks. To obtain these metrics, we hired the services of a specialized company: Metric Salad Métricas and Analíticas Digitales S.L. From December 2017 until March 2018, this company provided a weekly report to the research team with the evolution of Twitter data (number of followers, followed, published tweets, averages, etc.) of media included in the data base. The combination of our own coding and data provided by Metric Salad resulted in a document that included 295,066 cells when performing this analysis. Specifically, this analysis corresponds to data updated through March 12, 2018.

Data were examined through statistical procedures. In addition, we produced data visualizations in two ways: a basic graphical analysis provided by Google Sheets and an advanced graphic treatment through Tableau software which, among other things, allowed us to do a cartographic visualization of digital media.

4. Results

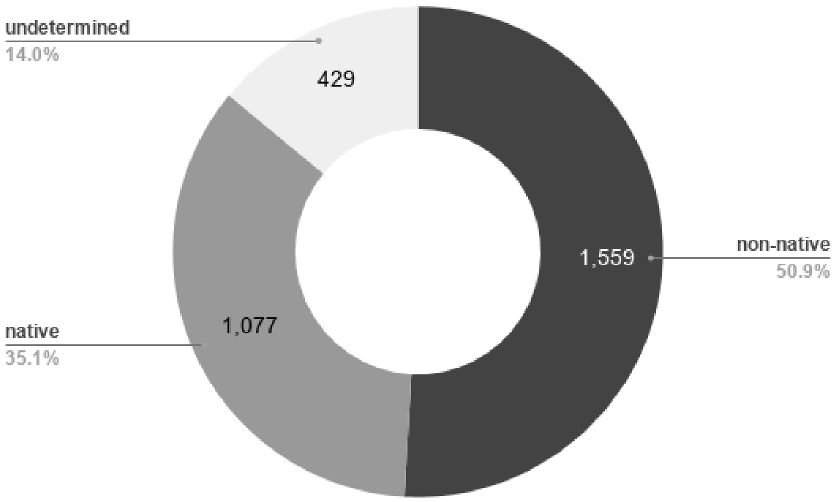
In March of 2018, reference date for this updated map of digital media in Spain, we identified a total of 3,431 digital media. Of these, 89.3% (3,065) were active, compared to 10.7% (366) with unregistered activity. We identified as inactive every media outlet that, despite being visible and accessible on the web, had not updated its contents at least once in the three months previous to the day of observation.

Graphic 1. Digital media in Spain in 2018 by status (N=3,431).



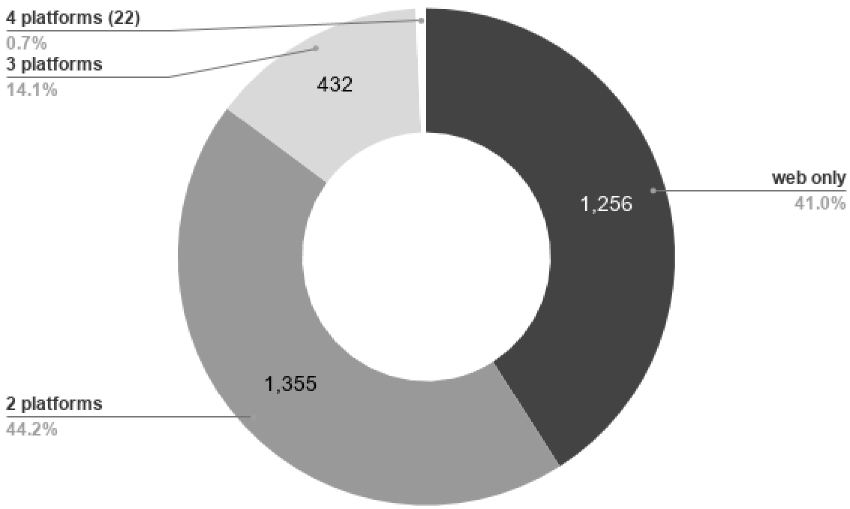
Out of the active digital media, a total of 1,077 (35.1%) were digital natives, compared to 1,559 (50.9%) that were non-native media, which represents a significant increase of natives compared to previous studies (López García *et al.,* 2005; Salaverría, 2008); this also surpasses the number of 812 digital media registered in 2015 by the Observatory on New Media. Subsequent studies will have to determine the origin of the 429 (14%) remaining digital media, either native or non-native, because they did not provide any conclusive information about it in their corporate homepages. In all variables, when the nature of a media couldn't be determined regarding, a value of "undetermined" was assigned in the data base (abbreviation "ND" was used). This circumstance explains the fact that the N value of some graphics, tables, and figures showed below is less than 3,065 active digital media identified.

Graphic 2. Active digital media in Spain in 2018 by origin (N=3,065).



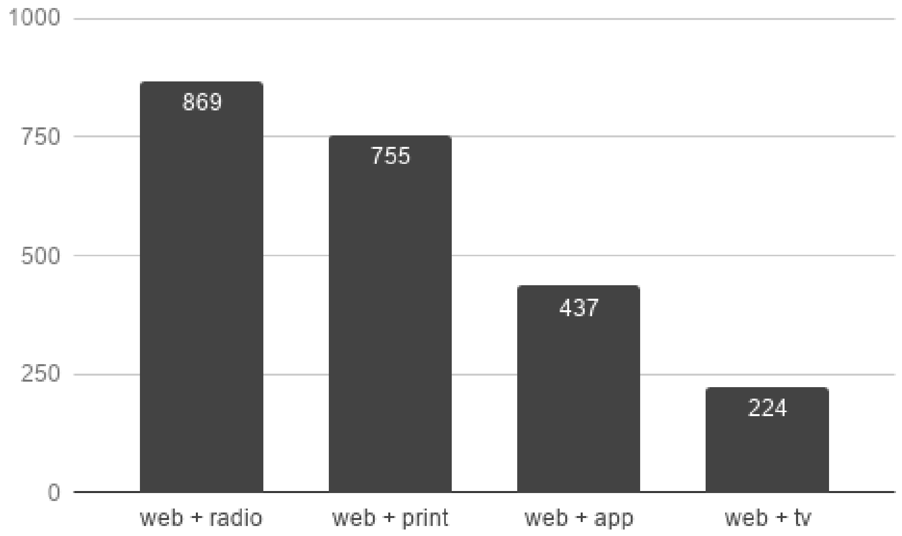
Regarding platforms used by active digital media, almost 60% (1,809) combine publication on the web with presence in two, three, or four platforms (press, radio, television, and/or mobile applications). The most frequent situation was the simultaneous application in two platforms.

Graphic 3. Active digital media in Spain in 2018 by platform (N=3,065).



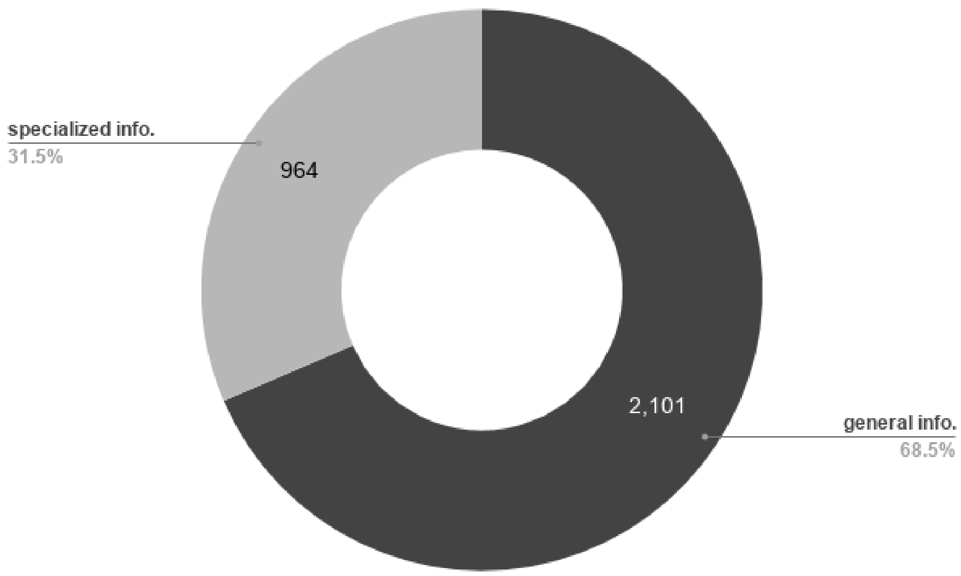
Out of the 1,809 media that combined the web with another platform, most of them were linked to radio stations, with 869 (48%) cases, and printed publications, with 755 (41.7%). Digital media associated with a television station totaled 224 (12.4%), while those having applications for mobile phone and/or tablets totaled 437 cases (24.1%), almost a fifth of the total (this group exceeds 100% because, as we indicated, certain digital media were published in three and even four platforms simultaneously). The significant evolution in use of applications, a platform that didn't exist in the census of 2005, stands out as an issue that would need to be studied more thoroughly.

Graphic 4. Active digital media in Spain in 2018 by complementary platforms (N=1,809).



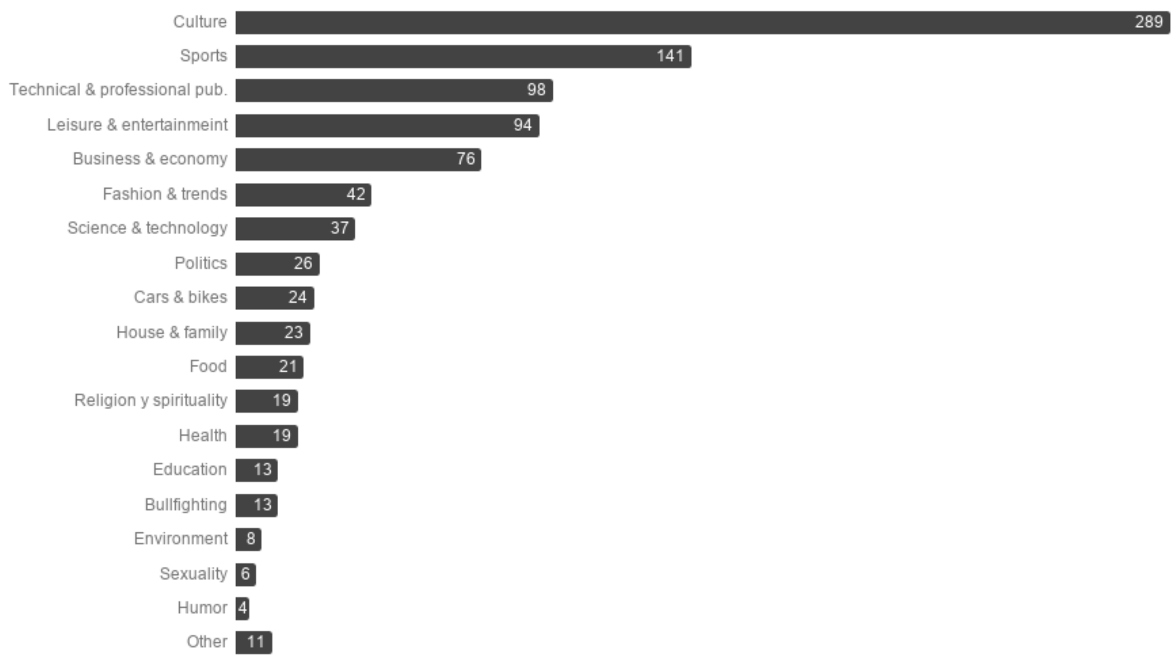
Regarding the type of content, 2,101 digital media (68.5%) developed contents related to general news, while 964 (31.5%) offered specialized information.

Graphic 5. Active digital media in Spain in 2018 by type of content (N=3,065).



Specialized topics were quite varied. Digital media dedicated to culture predominated, with 289 outlets, almost a third (30.0%) of specialized media. In this category of culture, publications on various topics were included, such as literature, cinema, music, and art in general. Following cultural publications, the most common specialized areas were sports (141 digital media; 14.6% of specialized media), technical and professional publications (98; 10.1%), and leisure and entertainment (94; 9.7%). It is worth clarifying that publications focused on news about celebrities, commonly referred to as 'gossip press', were included in this category of leisure and entertainment.

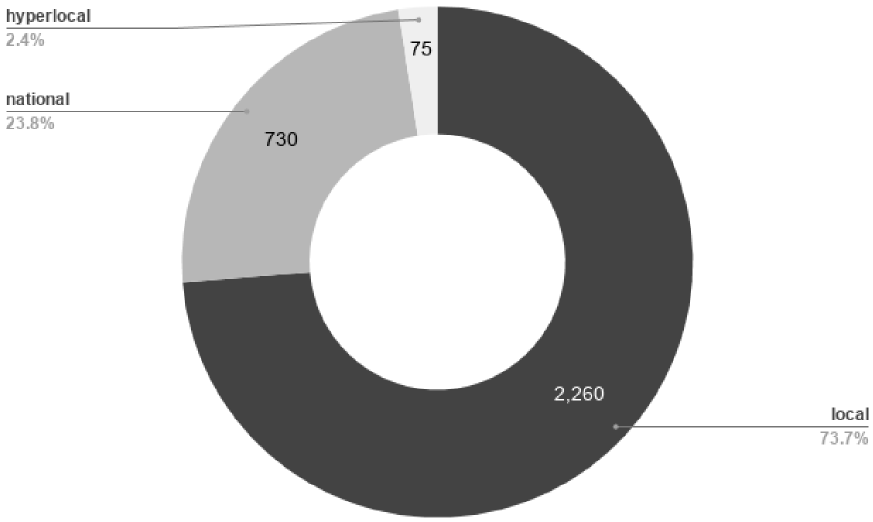
Graphic 6. Active specialized digital media in Spain in 2018 by specialty (N=964).



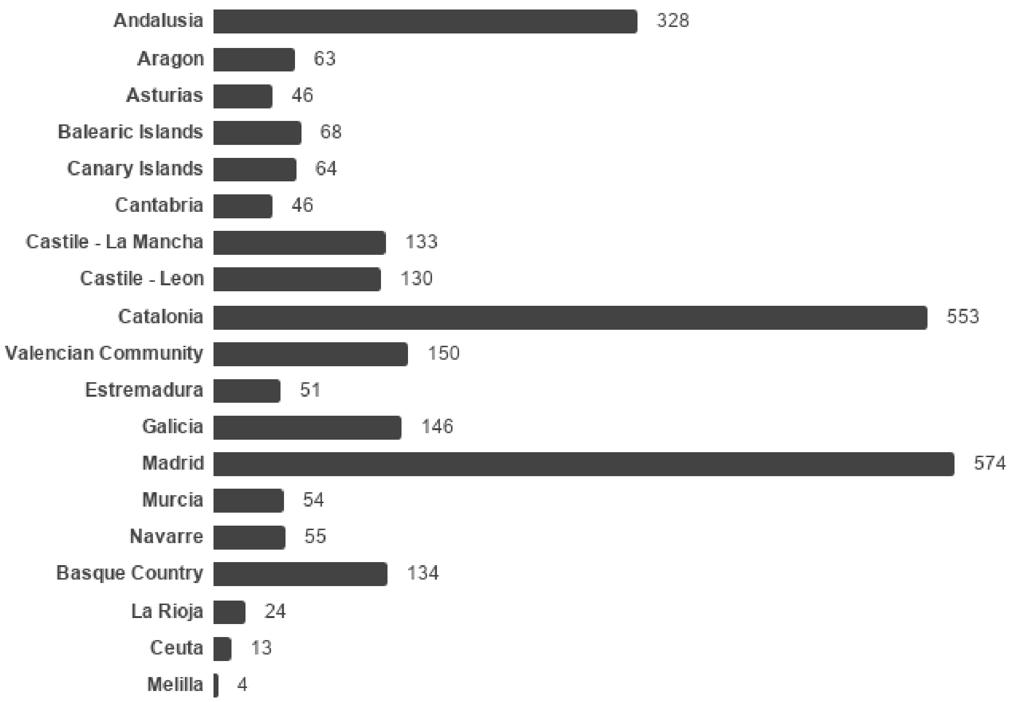
Regarding the geographic coverage area, local digital media predominated with 2,260 examples (73.7%); we understood as local media those including municipal media up to media oriented towards an entire autonomous community, including regional and provincial media. The group of media oriented to a national market followed with 730 (23.8%) publications, trailed by hyperlocal digital media, namely media published for a neighborhood or a district; this last category included 75 examples (2.4%).

Regarding territorial distribution, autonomous communities with the greatest number of digital media were Madrid (574, 21.8%), followed closely by Catalonia (563, 21%) and, farther back, by Andalusia (382, 12.4%). Then followed the Valencian Community (150, 5.7%), Galicia (146, 5.5%), and Basque Country (134, 5.1%). In this category it was not possible to identify the headquarters of 429 digital media, mainly of specialized topics, which explains why the analysis of this variable is based on only 2,636 active digital media.

Graphic 7. Active digital media in Spain in 2018 by geographic reach (N=3,065).



Graphic 8. Territorial distribution of digital media in Spain in 2018 (N=2,636).



The autonomous communities with the highest number of digital media correspond to the zones of highest population concentration. To obtain the ratio of digital media per capita in every autonomous community, we proceeded to weight the value with that of the population included in the census of the National Statistical Institute (INE) in 2017. From these data, we conclude that the number of digital media per inhabitant is higher in more populated communities, while in less populated communities, the relationship of inhabitants per digital media is lower.

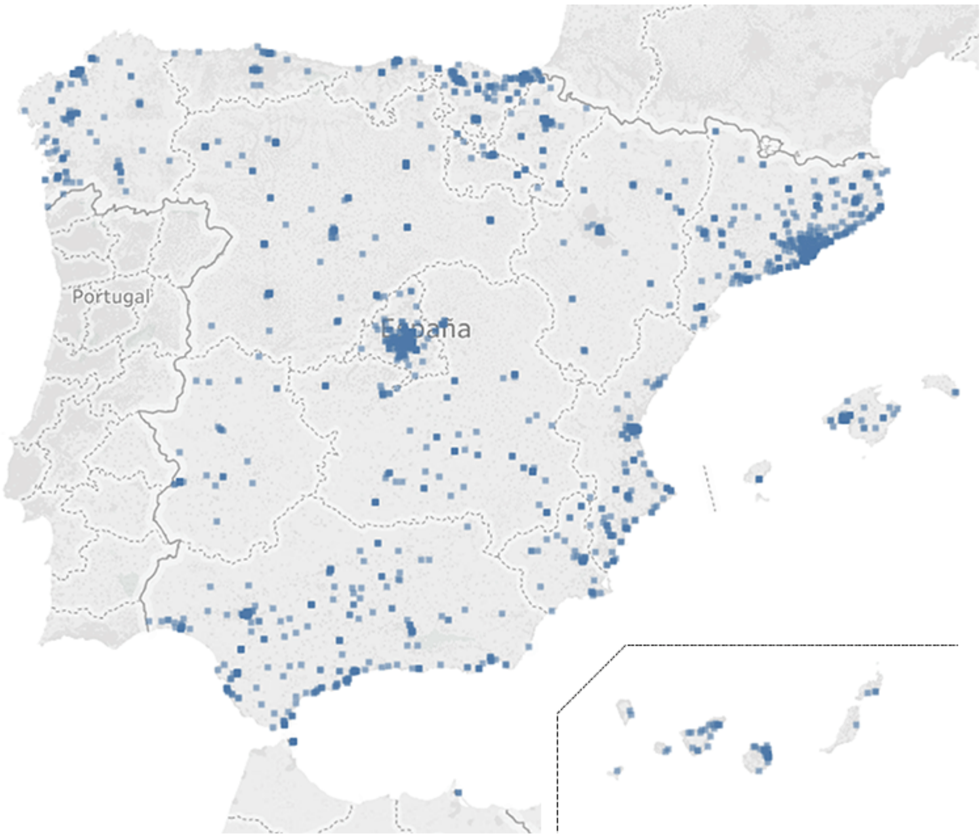
Table 2. Active digital media in Spain in 2018, by population and autonomous community (N=3,065).

Autonomous Community	Population 2017[i]	Nº of digital media	Nº of inhabitants per digital media
Andalusia	8,379,820	328	25,548
Aragon	1,308,750	63	20,774
Asturias	1,034,960	46	22,499
Balearic Islands	1,115,999	68	16,412
Canary Islands	2,108,121	64	32,939
Cantabria	580,295	46	12,615
Castile - La Mancha	2,031,479	133	15,274
Castile - Leon	2,425,801	130	18,660
Catalonia	7,555,830	553	13,663
Valencian Community	4,941,509	150	32,943
Extremadura	1,079,920	51	21,175
Galicia	2,708,339	146	18,550
Community of Madrid	6,507,184	574	11,337
Region of Murcia	1,470,273	54	27,227
Navarre	643,234	55	11,695
Basque Country	2,194,158	134	16,374
La Rioja	315,381	24	13,141
Ceuta	84,959	13	6,535
Melilla	86,120	4	21,530
Autonomous Community not identified	—	429	—
Spain Total	**46,572,132**	**3,065**	**15,194**

[i] Population data obtained from the National Statistics Institute (www.ine.es).

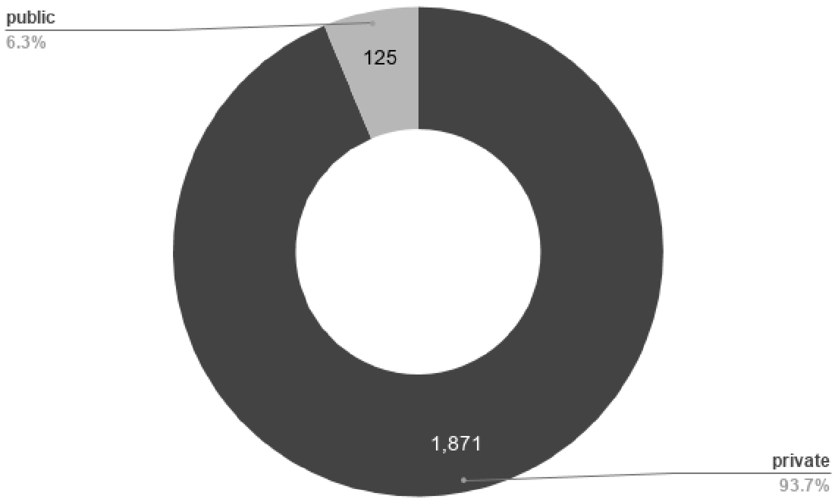
In the following map (Figure 1) we show the territorial distribution of digital media from their geo-localization. The map does not include all of the 3,065 active digital media, but just 2,492, 81.3% of the total of registered publications. The reason is that only in this four-fifths of the total was it possible to obtain the postal code of the digital media headquarters, a data point needed to elaborate the map. In any case, despite not reflecting all of active digital media, the map clearly shows a greater concentration of digital publications in those autonomous communities of higher population and, in particular, around the main cities.

Figure 1. Geolocalization of active digital media in Spain in 2018 (N=2,492).



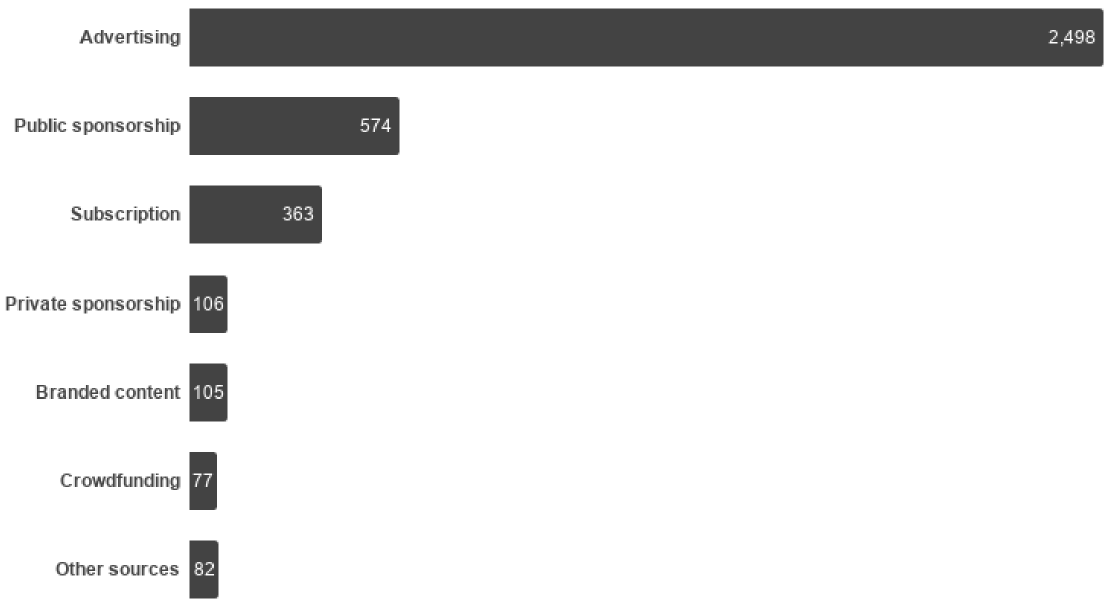
Regarding ownership, this study identified and coded the ownership of 1,996 active media, barely two-thirds of the registered total. Despite this somewhat low number, it is a significant total that indicates a clear trend: the great majority of digital media in Spain, 93.7% (1,871), are privately owned. Publicly funded initiatives mainly correspond to digital media of municipal corporations and represent a small sample of the total: only 6.3% of cases (125).

Graphic 9. Active digital media in Spain in 2018 by ownership (N=1,996).



In regard to funding, advertising was the predominant option: 2,498 digital media (81.5%) used advertising as part of their revenue model. However, data revealed that this type of funding is starting to be combined with other complementary funding sources. Public sponsorship, present in 574 digital media (18.7%), was the second most common type, and subscription the third, with 363 (11.8%). Funding through donations from the public, also known as 'crowdfunding', showed itself to be an unusual practice (77 digital media, 2.5%). Also several dozen media included among their funding sources such things as consulting services, 'merchandising' sales, organization of events and the like. In any case, we must consider that all these funding sources are not mutually exclusive; that is, there were digital media that simultaneously combined two, three, four and, in a half-dozen cases, up to five of these funding sources.

Graphic 10. Active digital media in Spain in 2018 by funding model (N=3,065).



Among autonomous communities, Madrid outstands as the one where more digital media used advertising as a funding method (490), followed by Catalonia (430) and Andalusia (265). In any case, the data is relative, because other communities with a lower total number of digital media showed a similar percentage of advertising use as a funding method. By volume, the second most used funding type for digital media was sponsorship or subsidy by public administrations. This funding type was particularly widespread in Catalonia (191), Andalusia (72) and Basque Country (55), mainly among local media. From the territorial perspective, the funding types were distributed as follows.

Regarding languages used for publication, we found, as expected, that Spanish was the main one: 2,293 (75.8%) digital media used it as the main or complementary language. Together with Spanish, there was a significant presence of all official languages of the State. Catalan stands out with 534 (17.5% of the national total), followed at a distance by Basque 109 (3.6%) and Galician 88 (2.9%). In Catalan's case, it was used in nine out of ten digital media in Catalonia. Likewise, it is worth mentioning that in zones of tourism and/or European immigration, there was a significant number of digital media published in English and German, as well as other less represented languages.

Table 3. Active digital media in Spain in 2018 by funding type and autonomous community (N=2,636).

Autonomous Community	Advertisement	Subscription	Sponsored content	Private sponsorship	Public sponsorship	Donations
Andalusia	265	32	12	9	76	7
Aragon	47	9	1	1	12	0
Asturias	33	6	1	0	4	1
Balearic Islands	59	9	4	3	11	2
Canary Islands	59	3	2	3	9	1
Cantabria	32	6	1	2	8	0
Castile - La Mancha	120	6	2	1	22	1
Castile - Leon	123	13	7	1	17	2
Catalonia	430	81	8	14	191	8
Valencian Community	127	9	10	8	17	4
Extremadura	48	4	8	9	16	1
Galicia	127	22	8	6	21	4
Community of Madrid	490	116	20	23	45	23
Region of Murcia	44	3	2	2	7	2
Navarre	48	6	4	1	14	1
Basque Country	109	14	5	6	55	5
La Rioja	21	2	1	2	2	0
Ceuta	10	3	1	1	2	0
Melilla	4	2	0	0	0	0
Total	**2,196**	**346**	**97**	**92**	**529**	**62**

Another notable aspect is the significant linguistic diversity of digital media. As expected, digital publications using Spanish are a wide majority: three out of four active digital media (2,294 publications; 74.8%) use Spanish as their only publication language, or combined with other languages. Meanwhile, in the autonomous communities with co-official languages, the presence of digital media published only in the local language or in bilingual format is quite remarkable —and there are even some digital media that publish more than two languages. Specifically, in the Basque Country and, very especially, in Catalonia, there are more digital media published in Basque or in Catalan, respectively, than in Spanish. By autonomous communities, the distribution of the different languages in March 2018 was as follows:

Table 3. Territorial distribution of active digital media in Spain in 2018 by publication languages (N=3,065).

Autonomous Community	Spanish	Catalan	Basque	Galician	Valencian
Andalusia	365	0	0	0	0
Aragon	71	1	0	0	0
Asturias	48	0	0	0	0
Balearic Islands	54	19	0	0	0
Canary Islands	98	0	0	0	0
Cantabria	51	0	0	0	0
Castile - La Mancha	144	0	0	0	0
Castile - Leon	150	10	0	0	0
Catalonia	133	508	0	0	0
Valencian Community	153	2	0	0	51
Extremadura	59	0	0	0	0
Galicia	116	0	0	85	0
Community of Madrid	628	3	0	2	2
Region of Murcia	60	0	0	0	0
Navarre	46	0	20	0	0
Basque Country	75	1	89	0	0
La Rioja	26	0	0	0	0
Ceuta	13	0	0	0	0
Melilla	4	0	0	0	0
Total	**2,294**	**534**	**109**	**88**	**53**

5. Discussion and conclusions

This quantitative study of digital media in Spain resulted in an updated, extensive, and significant profile compared to previously available data. We identified 3,431 digital media in March 2018, of which 3,065 were active (that is, were updated at least once in the previous three months). This number of digital media demonstrates a spectacular growth in the last decade, since it practically triples the 1,274 digital media included in the census in the previous decade (Salaverría, 2005). The growth is especially significant because it coincided with a period of deep economic crisis, which contributed to the decline of traditional media (Díaz Nosty, 2011). In addition, we have confirmed that the growth occurred especially among digital media with geographical reach at the level of municipal, provincial, and autonomous communities: three-fourths of digital media identified for this study were local or hyperlocal (75%). On the other hand, a third of the total of digital media in the country (35%) were digital natives. All these evidences fully confirm the H1 of this study.

However, the local reach means, by definition, a limited audience. In general, this means that these media are destined for a precarious existence, with very small editorial staffs made up of professionals with low expertise in the use of digital technology or commercial strategies. In a 2015 report produced by the Press Association of Madrid (APM), 458 active media launched in Spain by journalists between

2008 and 2015 were studied, of which almost 30% focused on local or hyperlocal news (APM, 2015). The study concluded that most of these publishers had very limited commercial and technological abilities, which translated into a high financial vulnerability (Breiner, 2016). This current study provides context for those conclusions, offering new empirical evidence regarding the great magnitude of the phenomenon.

Furthermore, our study highlights a new relevant factor that has not been included in the APM research: the increasing relevance of public funding (15.9% of analyzed digital media), both at the level of municipal and autonomous communities, for the sustainability of digital media. This public source of funding, even though it was useful to develop local media in quantity and diversity, promoting for instance a great linguistic diversity, puts at risk the editorial independence of those digital media at the local level.

In a survey of 194 leaders of digital media in 29 countries, elaborated by Reuters Institute for the Study of Journalism, 44% believed that in 2018 subscriptions would be a "very important" source of digital income, above digital advertising (38%) or sponsored content (39%) (Newman, 2018: 5). The Spanish market of digital news media diverges considerably from that expectation, since advertising still is, undeniably, the most widely used funding source among digital media.

Even so, it is remarkable that 363 digital media (11.8%) in this study use some form of subscription payment and that another 77 (2.5%) try to get funds from crowdfunding strategies. Barely a decade ago it was widely believed that nobody would pay for digital news, especially in Spain. Even though advertising and sponsorship still lead among funding sources, we detect a significant percentage of media that use innovative programs to attract subscribers, operating under various names such as "partner", "member", "super-friend", "sponsor", or others that suggest a bond with the user beyond the mere economic transaction. The payment represents the support for the media's mission, which is often positioned as an independent or different journalism (Breiner, 2017).

This group of funding sources that is more and more diverse requires at least a partial reconsideration of H4: the funding of digital media in Spain no longer depends on advertising—even though this source is still dominant (81.5%)— but it is complemented more and more with subscription programs and, above all, public subsidies or sponsorships, the latter mainly -in local media. Future research will need to answer the question of whether these emerging funding strategies are being incorporated equally by different types of digital media, as well as whether public subsidies to digital media have developed with the same intensity in each of the seventeen autonomous communities.

In any case, the national map of digital media fully confirms H2 because it reveals a marked concentration of these publications in cities, provinces and autonomous communities with greater population density. Nevertheless, these data leave the issue open of whether this concentration of digital media not only responds to population factors but is also linked to other elements, such as income per capita or the percentage of Internet use of each region. These hypotheses are still unknown and should be cleared up in future studies.

Regarding the use of platforms, the study has confirmed that the number of broadcast stations using the web in combination with the traditional antennae increased noticeably. While back in 2005 they represented 27%, by 2018 they grew to 38%, even though the total number of digital media is almost three times higher. In the case of traditional printed media, the use of other platforms declined, from 54.6% in 2005 to 33% in 2018. This percentage decrease of digital media linked to the printed press can be related to the closure of magazines and newspapers, both free and subscription, that occurred during the long economic crisis. It is also important to highlight that 1,256 active media—that is, 41% of the total— were exclusively published on the web; in 2005, this percentage was barely 9.1%. Therefore, we conclude that one of the main distinctive features of the digital media map in Spain is the strong growth of digital native publications. The rest of the media complement their presence on the web with two (44.2%), three (14.1%) or even four (0.7%) platforms. Therefore, we can state that the complementarity of platforms has also consolidated.

Regarding contents, a wide majority of media prefer general news and information (68.5%), hence confirming H3. The percentage of general information media increased almost ten percentage points compared to the census of 2005, where 59.7% of media were of general information. This is explained, to a great extent, by the boom of local and hyperlocal digital media, which are more inclined to produce local news of general interest. On the other hand, specialized digital media declined from 40.3% in 2005 to 31.5% in 2018. The topics most notable among them are culture (30%), sports (14.6%), technical and professional publications (10.2%), and leisure and entertainment (9.8%). It is eye-catching that business (7.9%), as well as science and technology (3.8%), had relatively low totals.

The group of these data reveals a market of digital media in Spain that is expanding l , quite diversified and with a noticeable level of consolidation. Although the business model is still the main sticking point, digital media have learned how to swim against the current and, in an adverse economic climate, they have expanded in number while at the same time diversifying their typology. Future studies should explore whether this development has equally affected the different types of media and whether it has been distributed in a homogeneous manner throughout the country.

* This study has been conducted from the Center for Internet Studies and Digital Life of Universidad de Navarra, in the framework of the research project titled “Informative uses and preferences in the new media map in Spain: audiences, companies, contents and management of the reputation in a multiscreen environment”, co-funded by the Ministry of Economy and Competitiveness and the European Fund of Regional Development, reference CSO2015-64662-C4-1-R MINECO/FEDER, UE.

6. List of references

APM (2015): “Medios lanzados por periodistas”. Madrid: Asociación de la Prensa de Madrid. Available at http://www.apmadrid.es/nuevos-medios-lanzados-por-periodistas/

Aguado, Juan Miguel, & Castellet, Andreu (2013): “Periodismo móvil e información ubicua”. In: Aguado, Juan Miguel; Feijóo, Claudio; & Martínez, Inmaculada J. (Coords.). *La comunicación móvil. Hacia un nuevo ecosistema digital* (pp. 187-218). Barcelona: Gedisa. ISBN: 978-84-39784-782-7

Arroyo, Natalia (2012): *Información en el móvil*. Barcelona: Editorial UOC. ISBN: 978-84-9788-496-9

Breiner, James (2017): “Cómo los medios digitales monetizan su ‘capital social’”. *Periodismo Emprendedor en Iberoamérica*. Available at http://newsleaders.blogspot.com.es/2017/01/como-los-medios-digitales-monetizan-su.html

Breiner, James (2016): “12 mapas mundiales de medios sostenibles”. *Periodismo Emprendedor en Iberoamérica*. Available at http://newsleaders.blogspot.com.es/2016/06/12-mapas-mundiales-de-medios-sostenibles.html

Cabrera, Mª Ángeles (Coord.) (2013): *Evolución de los cibermedios. De la convergencia digital a la distribución multiplataforma*. Madrid: Fragua. ISBN: 978-84-70745-66-9

Campos-Freire, Francisco (2015): “Adaptación de los medios tradicionales a la innovación de los metamedios”. *El Profesional de la Información*, 24(4), 441–450. DOI:10.3145/epi.2015

Campos Freire, Francisco (Coord.) (2010): *El cambio mediático*. Seville: Comunicación Social. ISBN: 978-84-92860-25-8

Campos Freire, Francisco (2008): “Las redes sociales trastocan los modelos de los medios de comunicación tradicionales”. *Revista Latina de Comunicación Social*, 11(63), 277–286. DOI:10.4185/RLCS-63-2008-767-287-293

Casero-Ripollés, Andreu (2010): “Prensa en internet: nuevos modelos de negocio en el escenario de la convergencia”. *El Profesional de la Información*, 19(6), 595–601. DOI:10.3145/epi.2010.nov05

Díaz Noci, Javier. (2005): “Historia de los cibermedios en España”. In: Salaverría, Ramón (coord.) *Cibermedios. El impacto de Internet en los medios de comunicación en España* (pp. 21–38): Seville: Comunicación Social. ISBN: 978-84-96082-33-5

Díaz Noci, Javier, & Meso Ayerdi, Koldo (1997): *Medios de comunicación en Internet.* Madrid: Anaya Multimedia. ISBN: 84-415-0140-8

Díaz Nosty, Bernardo (2011): *Libro negro del periodismo en España*. Madrid: Asociación de la Prensa de Madrid. ISBN: 978-84-87641-47-3

Domingo, David (2008): “Interactivity in the daily routines of online newsrooms: Dealing with an uncomfortable myth”. *Journal of Computer‐Mediated Communication*, 13(3), 680–704. DOI:10.1111/j.1083-6101.2008. 00415.x

Domínguez, Eva, & Pérez Colomé, Jordi (2012): *Microperiodismos: aventuras digitales en tiempo de crisis*. Barcelona: Editorial UOC. ISBN: 978-84-978-8498-1

Domínguez, Eva, & Pérez Colomé, Jordi (2013): *Microperiodismos II: aventuras digitales en tiempo de crisis*. Barcelona: Editorial UOC. ISBN: 978-84-978-8498-3

García Avilés, José Alberto, & Arias, Félix (2016): “Evolución de los cibermedios en España: claves de innovación”. In: Sádaba, Charo; García Avilés, José Alberto; & Martínez-Costa, María Pilar (Coords.). *Innovación y desarrollo de los cibermedios en España* (pp. 63–71). Pamplona: EUNSA. ISBN: 978-84-313-3125-2

Gómez-Borrero, Pilar (2010): *Prensa e Internet, ¿dónde está el negocio?* Madrid: MediosON y EOI. ISBN: 978-84-614-4945-3

González Alba, José Antonio (2017): "Los labs de medios en España: la innovación desde el área de la organización periodística". *Cuadernos de Periodistas*, 33, 49–64.

Guallar, Javier (2015): Prensa digital en 2013-2014. *Anuario ThinkEPI*, 9, 153–160. DOI:10.3145/thinkepi.2015.37

López García, Guillermo (2015): *Periodismo digital. Redes, audiencias y modelos de negocio*. Salamanca: Comunicación Social. ISBN: 978-84-155-4493-7

López García, Guillermo (Ed.) (2008a): *Comunicación local y nuevos formatos periodísticos en Internet: Cibermedios, confidenciales y weblogs*. Valencia: Universidad de Valencia. ISBN: 8-84-691-6818-9

López García, Xosé (2008b): *Ciberperiodismo en la proximidad*. Seville: Comunicación Social. ISBN: 978-84-96082-72-4

López García, Xosé; Limia Fernández, Moisés; Isasi Varela, Antonio; Pereira Fariña, Xosé; Gago Mariño, Manuel; Calvo Diéguez, Rosario; & Orihuela, José Luis (2005): "Tipología de los cibermedios". In: Salaverría, Ramón (Coord.). *Cibermedios. El impacto de internet en los medios de comunicación en España* (pp. 39–82). Seville: Comunicación Social. ISBN: 978-84-92860-02-9

López García, Xosé, & Pereira Fariña, Xosé (Coords.) (2010): *Convergencia Digital. Reconfiguración de los Medios de Comunicación en España*. Santiago de Compostela: Servicio Editorial de la Universidad de Santiago de Compostela. ISBN: 978-84-9887-379-5

Martínez-Costa, María Pilar; Amoedo, Avelino; & Moreno, Elsa (2013): "Multiplataforma en cibermedios de matriz radiofónica". In: Cabrera, María Ángeles (coord.). *Evolución de los cibermedios. De la convergencia digital a la distribución multiplataforma* (pp. 157–166). Madrid: Fragua. ISBN: 978-84-7074-566-9

Masip, Pere; Díaz-Noci, Javier; Domingo, David; Micó-Sanz, Josep-Lluís; & Salaverría, Ramón (2010): "Investigación internacional sobre ciberperiodismo: hipertexto, interactividad, multimedia y convergencia". *El Profesional de la Información*, 19(6), 568–576. DOI:10.3145/epi.2010.nov.02

Meso Ayerdi, Koldo (2006): *Introducción al ciberperiodismo. Breve acercamiento al estudio del Periodismo en Internet*. Bilbao. Servicio de Publicaciones de la Universidad del País Vasco. ISBN: 84-8373-861-9

Micó, Josep Lluís (2006): *Periodisme a la xarxa. Llenguatge nou d'un ofici vell*. Barcelona: Eumo Editorial. ISBN: 84-9766-172-9

Newman, Nic (2018): "Journalism, Media, and Technology Trends and Predictions 2018". *Digital News Project 2018*. Reuters Institute for the Study of Journalism. Available at http://reutersinstitute.politics.ox.ac.uk/sites/default/files/2018-01/RISJ%20Trends%20and%20Predictions%202018%20NN.pdf

Noguera-Vivo, José Manuel (2016): “Metamedios y periodismo: revisión panorámica de los nuevos cibermedios”. *El Profesional de la Información*, 25(3), 341-350. DOI:10.3145/epi.2016.may.03

Roitberg, Gastón, & Piccato, Franco (eds.) (2015): *Periodismo disruptivo. Dilemas y estrategias para la innovación*. Buenos Aires: Icrj Futuribles. ISBN: 978-987-601-245-4

Sádaba, Charo; García Avilés, José Alberto; & Martínez-Costa, María Pilar (Coords.) (2016): *Innovación y desarrollo de los cibermedios en España*. Pamplona: EUNSA. ISBN: 978-84-313-3125-2

Sádaba, C., & Salaverría, R. (2016): “Los ‘labs’ de medios en España: modelos y tendencias”. In: Casero-Ripollés, A. (Ed). *Periodismo y democracia en el entorno digital* (pp. 149-164). Salamanca: SEP. ISBN: 978-84-606-6945-6

Salaverría, Ramón (coord.) (2005): *Cibermedios. El impacto de Internet en los medios de comunicación en España* (pp. 21–38). Seville: Comunicación Social. ISBN: 978-84-96082-33-5

Salaverría, Ramón (2017): “Tipología de los cibermedios periodísticos: bases teóricas para su clasificación”. *Revista Mediterránea de Comunicación*, 8(1), 19–32. DOI:MEDCOM2017.8.1.2

Salaverría, Ramón (2016a): *Ciberperiodismo en Iberoamérica*. Madrid/Barcelona: Fundación Telefónica & Ariel. ISBN: 978-84-08-15457-0

Salaverría, Ramón (2016b): “Redefinir al comunicador”. *El Profesional de la Información,* 25(2),163-167. DOI:10.3145/epi.2016.mar.02

Salaverría, Ramón (2008): “Ciberperiodismo. Diez años de prensa digital en España”. In: Fernández Sanz, Juan José (Ed.). *Prensa especializada. Doce calas* (pp. 355–383). Madrid: McGraw-Hill. ISBN: 978-84-691-6818-9

Yunquera Nieto, Juan (2016): *Revistas y diarios digitales en España: historia de una evolución*. Barcelona: Editorial UOC. ISBN: 978-84-9116-407-4

How to cite this article in bibliographies / References

R Salaverría Aliaga, MP Martínez-Costa Pérez, J Breiner (2018): “Map of digital news media at Spain in 2018: quantitative analysis”. *Revista Latina de Comunicación Social*, 73, pp. 1034 a 1053.
http://www.revistalatinacs.org/073paper/1295/54en.html
DOI: 10.4185/RLCS-2018-1295en

Article received on 19 April 2018. Accepted on 20 May.
Published on 25 May 2018.