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**BRAZILIAN NEWSPAPERS:
THE RISK OF BECOMING IRRELEVANT**

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Introduction

Brazilian newspapers are shrinking despite never having been genuinely mass-market. After nearly doubling their circulation between 1990 and 2010¹, paid-for dailies are rapidly losing in this decade the capacity to reach a sizeable readership. Not only did total paid-for dailies average circulation fall 9.3 percent from 2010-14,² but also the percentage of the Brazilian adult population that reads newspapers every day fell by almost one-quarter over this period, slumping from 27 percent to 21 percent.³ Compared to other Latin American countries and to some of the BRICS, this is one of steepest declines in the “newspaper reach” indicator.⁴

Not long ago the future seemed bright for the newspaper industry in Brazil: from 2005 to 2009 paid circulation rose 20.7 percent, practically twice the growth of the Chinese dailies during the same period.⁵ So why do Brazilian newspapers face the risk of becoming irrelevant? The easiest answer to this question would be to blame the Internet but that would mean ignoring the historical difficulty of the print press to penetrate the masses and find a broad appeal. In the early fifties, the newspaper industry in Brazil was selling 110.6 copies per 1,000 people,⁶ a penetration figure that, by the end of the 1960’s, had declined to 45.4 copies⁷ and then went further down to 36.7 copies in 2014.⁸ This paper will address the historical reasons for the weakness of the Brazilian print press (Straubhaar, Olsen and Nunes 1993) as well as the difficulty of the newspapers to reach the lower income classes: the prohibition by the Portuguese Crown of any printing in Brazil until 1808 and the initial adoption of an economic system based on slavery (Sodré 1977); the high illiteracy rates that characterized the country until recently; the lag in the development of a national cultural industry; the censorship during dictatorial regimes; and the incentives given by the military governments to consolidate television as the main national medium (Guedes-Bailey and Jambeiro Barbosa 2008), among many other factors.

But it will also advance further, into the past two decades, to show why the same economic and social changes that boosted the newspaper industry’s fortunes are now contributing to its downfall. From 1994 to 2014, Gross Domestic Product (GDP) per capita increased more than threefold⁹ and the number of students enrolled in tertiary education has risen more than four and

¹ <http://www.anj.org.br/circulacao-diaria-2/>

² <http://www.anj.org.br/circulacao-diaria-2/>

³ Source: World Press Trends Database

⁴ Sources: World Press Trends Database, TGI Latina, ACIM Colombia, Departamento Administrativo Nacional de Estadística (DANE) and KantarMedia Research Peru Anuario 2015

⁵ <http://www.economist.com/sites/default/files/special-reports-pdfs/bulletins-from-the-future.pdf>

⁶ Ratio calculated using demographic data from the Brazilian Institute of Geography and Statistics (IBGE) (<http://www.censo2010.ibge.gov.br/sinopse/index.php?dados=4&uf=00>) and circulation data from the book “História Cultural da Imprensa: Brasil - 1900-2000”, by Marialva Barbosa, page 154

⁷ Ratio calculated using penetration data available in “História Cultural da Imprensa: Brasil - 1900-2000”, page 176

⁸ Ratio calculated using population data from the World Bank (<http://data.worldbank.org/indicator/SP.POP.TOTL>) and circulation data from the National Association of Newspapers (<http://www.anj.org.br/circulacao-diaria-2/>)

⁹ <http://databank.worldbank.org/data/reports.aspx?source=2&country=&series=NY.GDP.PCAP.CD&period=>

a half times.¹⁰ At least 30 million Brazilian moved out of poverty to the new middle class during the 2000's (Power 2016), thus altering the consumption patterns. The period of relative macroeconomic stability initiated in 1994, with a drastic decline in inflation, paved the way for a surge in the consumption of goods and services among the lower social classes (Stycer 2015). By 2000, of the 12 best-selling Brazilian newspapers, six were considered of popular appeal.¹¹

Fuelled in part by this new-found readership, paid circulation expanded at an average year-on-year growth rate of 4.42 percent between 1991 and 2000.¹² However, the relatively fast pace of expansion achieved during the 1990's, would decrease significantly through the following decades. Through the 2000's and 2010's (so far), the country's population increased at a much faster pace than the paid-for dailies circulation. In fact, between 2011 and 2014, circulation shrunk at an average rate of 4.31 percent year-on-year,¹³ while the number of inhabitants in the country continued to rise. Consequently, newspaper readers are becoming an increasingly smaller share of the Brazilian population.

Although readership and penetration figures indicate a major transformation in the way Brazilians consume news, to address the reasons behind these changes is necessary to examine - in addition to the historical, social and economic factors - the digital revolution that has swept the country in the past few years. Internet penetration jumped from 40.7 users per 100 people, in 2010, to 57.6, in 2014,¹⁴ a 41.5 percent hike over five years. During the same period, smartphone sales increased more than elevenfold to 54 million¹⁵ and the average speed of broadband rose 76 percent.¹⁶ In urban Brazil, online media has surpassed TV as the main source of news.¹⁷

The consumer's shift towards a digital environment shouldn't be necessarily bad news for the legacy media since all the main newspapers in the country are present on the Internet. Yet, by 2013 advertisers were converging not to traditional news websites but to Google and Facebook, where most readers search for news without any sense of loyalty to established journalistic brands (Herscovitz 2016). A massive survey, released in 2014 and based in 18,312 interviews,¹⁸ revealed that Facebook is the main source of information for the Brazilians on the Web, easily eclipsing news brands owned by some of the most powerful national media groups.

Evidence provided by other studies suggest that it might be useful to consider the increasingly important role that social media is playing in the changing habits of the Brazilian readership. Since

¹⁰<http://www.valor.com.br/empresas/4343162/numero-de-matriculas-no-ensino-superior-sobe-71-em-2014-segundo-mec> and <http://portal.inep.gov.br/web/censo-da-educacao-superior/evolucao-1980-a-2007>

¹¹ Source: "World Press Trends Report 2001", by the World Association of Newspapers

¹² Rate calculated using data from the National Association of Newspapers (ANJ) (<http://www.anj.org.br/circulacao-diarial-2/>)

¹³ Rate calculated using data from ANJ (<http://www.anj.org.br/circulacao-diarial-2/>)

¹⁴ <http://data.worldbank.org/indicator/IT.NET.USER.P2>

¹⁵ Source: IDC

¹⁶ <http://www.teleco.com.br/blarga1.asp>

¹⁷ Newman, Nic, Levy, David A. L. and Nielsen, Rasmus Kleis. *Reuters Institute digital news report*. Oxford: Reuters Institute for the Study of Journalism, 2015

¹⁸ <http://www.fndc.org.br/download/pesquisa-brasileira-de-midia-2014-habitos-de-consumo-de-midia-pela-populacao-brasileira/publicacoes/198/arquivo/pesquisabrasileirademidia2014.pdf>

2010, the number of Facebook users in the country has grown twelve times to 89 million.¹⁹ In January 2015, there were 96 million active social media accounts in the country²⁰ - nine out of ten Brazilian Internet users access any social network.²¹ Thus social media is the starting point for 48% of the people looking for news online in urban Brazil. That's the highest rate among the 18 countries included in the "Reuters Institute Digital News Report 2015" and its supplementary report.²² Brazil is also the biggest user of WhatsApp for news and the country with the highest percentage of people sharing journalistic content via social network, says the report.

The first section of this paper examines the reasons for the late development of the print press in Brazil, focusing specifically in the period between 1808 - when the first Brazilian newspaper was published - and the coronation of the second and last Brazilian emperor, Dom Pedro II, in 1841. The following section encompasses the gradual transition of the Brazilian newspapers from extremely small and simple enterprises to more structured companies - a transformation that gradually happened along the second half of the 1800's until the first decades of the 20th century. The third section covers six decades - from the mid 40's to 1994 - to explain some of the reasons why the print press has hardly ever been a truly mass media in the country. The fourth section analyses how the economic and social changes in Brazil during the last 20 years are altering radically the consumption of news in the country and, consequently, challenging the dominant media outlets. Nevertheless, television remains the only truly national news source (Straubhaar, Olsen and Nunes 1993). The fifth discusses whether Brazilian papers are heading toward irrelevance. The most important findings are summarized in the conclusion. Data sources used for each chapter vary greatly. Whilst the three first sections rely on information provided by historians, reference books, academic articles and the National Association of Newspapers (ANJ), the last two are based on data gathered by the World Association of Newspapers and News Publishers (WAN-IFRA), consulting firms and international institutions (World Bank and Unesco), besides a few complementary interviews.

¹⁹ <http://www.emarketer.com/Article/Social-Network-Facebook-Base-Latin-America-Smaller-than-Expected/1009420> (2010) and http://www.bbc.com/portuguese/noticias/2014/10/141028_eleicoes2014_internet_rb (October 2014)

²⁰ Source: We Are Social (http://pt.slideshare.net/wearesocialsg/digital-social-mobile-in-2015/72-We-Are-Social-wearesocialsg_72ACTIVEINTERNET), slide 72

²¹ Ratio calculated using data from We Are Social (http://pt.slideshare.net/wearesocialsg/digital-social-mobile-in-2015/72-We-Are-Social-wearesocialsg_72ACTIVEINTERNET), slides 72 and 75

²² Newman, Nic, Levy, David A. L. and Nielsen, Rasmus Kleis. *Reuters Institute digital news report*. Oxford: Reuters Institute for the Study of Journalism, 2015 and Fletcher, Richard, Radcliffe, Damian. *Reuters Institute digital news report: supplementary report*. Oxford: Reuters Institute for the Study of Journalism, 2015

1. A latecomer: the origins of the Brazilian press

The colonial period

It took nearly three centuries, since the beginning of colonization, for the print press to reach Brazil, but when the first newspapers were published, in the early 1800's, one can hardly say that there was a vibrant market waiting for them. Back then, illiteracy was the rule and 30% of the population consisted of slaves (Abreu and Barros 2009). There were almost no private libraries, as books were considered to be “heretic instruments” (Sodré 1977), capable of disseminating the ideals of the French Revolution in Brazil, a Portuguese colony at that time. Even when compared to its South American peers, Brazilian print press had a late development. The first Peruvian newspaper came out in 1790 while Colombia's first paper was published one year later.²³ In North America, Boston had 15,000 inhabitants and two newspapers by 1719. By 1735, there were five papers in the city (Brock 2013, p. 22).

Terrified by the possibility that the “abominable French principles” (as said by a Portuguese diplomat) could spread out across its biggest colony, the Portuguese Crown put a ban on printing in Brazil until 1808 (Sodré 1977). That year, the Royal Court was transferred to Rio de Janeiro to escape the invasion of Lisbon by Napoleon's troops. The first printing press officially introduced in Brazil came from Europe, in one of the vessels of the fleet that took Prince Regent Dom João VI and his court to the colony.²⁴ It would be used initially to print official documents, under strict control of the government. Seven years earlier, in 1801, London had 13 daily and ten tri-weekly newspapers. Annual total sale of newspapers was then 16 million (Brock 2013, p. 19).

Before the arrival of the Portuguese Royal Court there were at least two isolated attempts to install printing presses in Brazil. One in 1706, in the north-eastern city of Recife, and another one in Rio de Janeiro, in 1746. In spite of being supported by local governors, these printing workshops were shut by the colonial authorities (Sodré 1977). With the arrival of the Portuguese Royal Court in 1808, the situation remained unchanged since there was no freedom of press at all. In order to circumvent prior censorship, the first Brazilian newspaper - “Correio Braziliense” - was published in London, by Hipólito José da Costa,²⁵ on 1 June 1808.

Son of a Portuguese military, Costa was exiled in England after fleeing from the jails of the Portuguese Inquisition. Being a friend of the Duke of Sussex, son of British King George III, he enjoyed all the necessary protection and support for printing “Correio Braziliense” monthly until 1822.²⁶ “Five hundred copies were printed [each month] and these copies were very expensive. Shipping [to Brazil and Portugal] was expensive. The other newspapers, that would be published subsequently, were also pricey but this one was more”, says the historian Isabel Lustosa, from Casa de Rui Barbosa, a public foundation based in Rio de Janeiro. In 1822, a reader in Rio de

²³ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

²⁴ *Ibid.*

²⁵ Source: personal interview with historian Isabel Lustosa

²⁶ Source: personal interview with historian Isabel Lustosa

Janeiro looking for one of the few available copies of “Correio Braziliense” would have to pay 1,280 réis, an amount that - by mid-2010 - was roughly equivalent to £27.²⁷

Just a few months after the launching of “Correio Braziliense”, a second newspaper was circulating in the capital of the colony. First published on 10 September 1808, “Gazeta do Rio de Janeiro” is known as the first paper actually printed in Brazil. It was an official publication of the Portuguese Royal Court, thus being edited and censored by redactors (and ministers) that were entirely trusted by the prince regent (Meirelles 2008). Over the years, the institutional newspaper would have its name changed from time to time until its final edition, in 1822.

Though the ban of any printing activities until 1808 clearly contributed to the late development of the Brazilian press, the key factor for this slow evolution was the lack of capitalism in the colony and, consequently, the absence of a bourgeoisie (Sodré 1977). According to Skidmore (2004), Portugal intended Brazil to be “little more than an illiterate agro-export outpost of the empire”, Since the beginning of the colonization, in the first decades of the 16th century, the colony’s main purpose was to enrich the Crown.

Except for the exporting companies, industrial enterprises were almost non-existent in colonial Brazil (Melo 2003). By 1823, there were 1.14 million slaves in Brazil amongst a population of nearly four million people (Abreu and Barros 2009, p. 38) - that is to say almost one third of the inhabitants in the colony neither had the freedom nor the means to consume newspapers. Compared to the Spanish colonies or to North America, slavery in Brazil was a far more massive institution (Skidmore 2004) and it would only be totally abolished in 1888. The situation contrasts with that in Britain, which - by 1821 - had a labour force of 2.4 million people employed in manufacturing businesses (Golby 1994). Within this economic framework, education was never a priority in Brazil during the colonial period. In 1822, when Brazil became independent from Portugal, a foreman responsible for supervising the slaves’ work earned a salary three times higher than that of a teacher.²⁸ The first Brazilian universities would only appear in the early 20th century, whilst in Spanish colonial America a university degree could be obtained in the 1570’s in Mexico City and Lima (Jefferson and Lokken 2011). The absence of the printing press in Brazil became a unique case in colonial Latin America (Skidmore 2004) as a result of all these negative factors combined.

After independence

Shortly after Brazil’s independence, a Constituent Assembly was established in 1823, a move that stimulated the political debate and, consequently, the creation of several radical newspapers. Known by media academics as the ideological period, this phase combined a more interpretative and polemic discourse with literary influences (Matos 2008). Ideological journalism prevailed in the wake of the increasing politicization of the population and gained strength due to the lack of “raw material” for the production of hard news (Bandeira de Melo 2005). “It was an incipient media: small newspapers in which the editor was at the same time the redactor and did everything else”,

²⁷ <http://www.anj.org.br/cronologia-jornais-brasil/> (conversion to GBP by the exchange rate of June of 2010, when the content was first published)

²⁸ <http://laurentinogomes.com.br/blog/2015/10/a-dura-vida-dos-professores-na-historia-do-brasil/>

explains Isabel Lustosa, adding that generally these papers were not sold on the streets but only by subscription. "They had no more than 200 subscribers."

The first Brazilian constitution - promulgated in 1824 by the emperor Dom Pedro I, son of Dom João VI - established the freedom of press as a rule. However, the document included articles vague enough to allow reprisals by the government.²⁹ In practice, the recently won freedom of press was already being undermined by the absolutist tendencies of the emperor, who dissolved the Constituent Assembly by the end of 1823. One year later, an uprising in northeastern Brazil - the Confederação do Equador - caused the emperor to declare a state of exception in the rebellious provinces.³⁰ Both events led to a weakening of the emergent press, even though newspapers continued to flourish in different parts of Brazil.

Only nine years after his coronation as the first Brazilian emperor, Dom Pedro I abdicated the throne in 1831, in favour of his five year-old son, Pedro II. The emperor's departure was the result of a crisis generated by - amongst other reasons - the constant political instability during his reign and, also, by his notorious oscillation between the Brazilian and Portuguese interests.³¹ The press played a decisive role in the abdication of Dom Pedro I, as most of the newspapers were opposed to the emperor, often criticizing him harshly (Silva 1992). By early 1832 - when Brazil was already governed by regents on the young Pedro II's behalf - there were about 50 newspapers in Brazil and headlines were filled with stories about the political dispute between right wing conservatives (that dreamed of the return of Dom Pedro I), liberal leftists and right wing liberals (Sodré 1977). The Regency Period in Brazil would come to an end in 1840, with the ascension of Pedro II to the throne, at the age of 14. Throughout this Second Reign, the country will experience an unprecedented freedom of press, which can be attributed to a tolerant attitude of the emperor.³²

Despite its technical shortcomings, artisanal production and restricted circulation reach, the Brazilian print press exerted remarkable political influence in 1830-50. Publications produced in an artisanal way - written, edited and printed by one single person - would lose ground to more "industrial" ones, published by companies from the second half of the 19th century onward, when new technologies were introduced in the country (Sodré 1977).

²⁹ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

³⁰ http://www2.uol.com.br/historiaviva/reportagens/caneca_nosso_primeiro_padre_querrelheiro_imprimir.html

³¹ <http://laurentinogomes.com.br/blog/2015/04/os-motivos-da-abdicacao-de-dom-pedro-i/>

³² http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

2. From craft to industrial stage: the turn of the 20th century (1841-1945)

Embryonic companies

The 48-year reign of the emperor Pedro II, from 1840 to 1889, is generally regarded as a period of political stability and economic prosperity (brought by coffee exports). Nevertheless, social and economic constraints were still limiting the development of Brazilian print press at that time.³³ By 1872, 84 percent of the population were illiterate³⁴ and 94 percent lived in rural areas (Santos 2008, p. 22), whilst in Europe literacy rates and urban population were increasing as modern nation-states were being formed and the Industrial Revolution was gathering speed.

In Italy, the overall percentage of literate people rose from 21 percent, in 1861, to 31 percent, ten years later, though in urban centres like Rome the rate was considerably higher at that time: 57 percent. It is estimated that, around 1800, 80 percent of all people were literate in the Dutch Republic (Harms, Raymond and Salman 2013).

In nineteenth-century Europe, as part of the creation of modern nation-states, “enrolling people into primary schools became a key challenge for governments”, explains historian Tania Regina de Luca, a professor at the Universidade Estadual Paulista (Unesp). “From the French Revolution onwards, education is considered a basic right and national identity is forged on the school benches.”

During the 19th century, compulsory schooling spreads throughout Europe and the United States (Justino 2014), creating the conditions for the flourishing of the editorial industry. “With the establishment of schools on a large scale, each child would receive five or six books. That gives rise to a publishing industry”, adds Tania.

In France, by the end of the 19th century, there was already a media culture in place,³⁵ whereas in Brazil the books were, in the overwhelming majority of cases, printed abroad - usually in Portugal, France or Germany (Sodré 1977). This situation remained unchanged from the 1850’s to the first decades of the 20th century (Hallewell 2005). Furthermore, primary schooling would only be made compulsory in Brazil during the 1930’s (Flach 2011), long after Greece (1834), Portugal (1844) and Ireland (1892), for instance (Justino 2014).

³³ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

³⁴ <http://biblioteca.ibge.gov.br/visualizacao/livros/liv2434.pdf>

³⁵ Source: personal interview with Tania Regina de Luca

Table 1: Year that compulsory schooling was established (selected countries)					
Country	Year	Country	Year	Country	Year
Prussia	1763	Norway	1848	Ireland	1892
Denmark	1814	Austria	1864	Netherlands	1900
Greece	1834	Switzerland	1874	Luxembourg	1912
Spain	1838	Italy	1877	Belgium	1914
Sweden	1842	United Kingdom	1880	Brazil	1934
Portugal	1844	France	1882		

Sources: "Escolaridade obrigatória: entre a construção retórica e a concretização política", by David Justino, and "Direito à educação e obrigatoriedade escolar no Brasil: entre a previsão legal e a realidade", by Simone de Fátima Flach

Despite all these obstacles, the Brazilian press was able to enter a new phase with the rise of Pedro II to the throne. The ephemeral publications with a pamphleteering style are gradually replaced by more substantial and well-structured newspapers, though the alignment with political movements remains in place.³⁶ The development of these embryonic newspaper companies was made possible by the enrichment of the Brazilian coffee-exporting elite, as well as the growing urbanization and industrialization of the country - a shift that began around 1880 and was intensified during the first decades of the 20th century (Seabra 2002, p. 34). Newspaper circulation had been growing since the mid-1870's, but this expansion was limited by the continental dimensions of the country and the limited geographical reach of the railway system (Luca 2008). Despite the fact that Brazil had 9,000 km of railroad built by 1889,³⁷ the trains reached only a few regions, limiting the newspaper distribution to the state capitals, especially outside Rio de Janeiro and São Paulo.

The flourishing print press in Brazil gained new momentum in 1874, when the northeastern city of Recife was connected to London via an undersea cable. Brazilian newspapers were no longer dependent on the news brought from Europe and America on ships (Sodré 1977). The existing network - the electric telegraph was introduced in Brazil in 1852 - was interconnected to the submarine cable and, by May 1889, the national terrestrial network spanned a total of 172 stations, covering 10,755 km.³⁸ "The laying of the first submarine cable linking London to Recife changed the Brazilian newspaper's temporality. It is no coincidence that two major Brazilian newspapers - 'O Estado de S. Paulo' and 'Gazeta de Notícias' - were founded in 1875", recalls Tania de Luca.

By 1895, Brazil's main newspapers were structured as companies (Sodré 1977). In Rio de Janeiro, then the capital of the country, dailies and magazines were already publishing photographs, as part of the effort to ensure their entry into modernity (Louzada 2009). Besides the linotype machines and the new photochemical methods that made colour printing possible,

³⁶ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

³⁷ *Ibid.*

³⁸ *Ibid.*

the turn of the 20th century is marked by a new phase of “aesthetic informative” journalism. According to Roberto Seabra (2002), this transitional phase encompasses the period between the late 19th century and the end of World War I. It combines the initial literary influences that shaped Brazilian journalism with a more market-oriented approach.

The new winds of censorship

The proclamation of the republic in 1889 changes dramatically the Brazilian media landscape in terms of freedom of press. While during the Second Reign newspapers and magazines were not censored at all, the Republican Era brought back restrictions to freedom of expression. Acts of violence became routine - initially against the few newspapers that still supported the overthrown monarchy.³⁹ Known as the Old Republic (“República Velha”), the period between 1889 to 1930, was characterized by repressive measures against civil liberties and, particularly, against the press. “Censorship [in Brazil] was in force many times throughout the 20th century and companies have had to adapt to survive. Those that failed were hopelessly decimated”, says Marialva Barbosa, professor at Universidade Federal Fluminense (UFF).

As urbanization and literacy continue to advance, so does the print press. In spite of remaining low, the percentage of Brazilians living in urban areas jumps from 6% to 10% between 1872 and 1900.⁴⁰ However, just over a third of the population (aged 15 and over) knows how to read by the beginning of the 20th century.⁴¹ In Rio de Janeiro, one in four inhabitants buys a newspaper in 1900. At that time, the combined circulation of the five most important papers in the city reaches 150,000 copies and the population is slightly above 600,000 (Barbosa 2007, p. 41). “The circulation of daily newspapers was significant, indicating that the print press was then a mass media”, explains Marialva Barbosa. By way of comparison, in July 2015 the five best-selling newspapers based in Rio had a total circulation of 692,546,⁴² whilst the city’s population have had surpassed the 6.4 million mark.⁴³

Despite the readership’s growth, a significant part of the print press had been receiving public subsidies since the early years of the republican regime, as part of a strategy to ensure that newspapers would only praise the government (Luca 2008). Legal measures were also used in an attempt to control the media during the Old Republic. Promulgated in 1923, the Press Law - popularly known as Adolfo Gordo’s Law, in an allusion to the senator who wrote the bill - was harshly criticized for limiting the freedom of speech. However, the number of daily titles had a noticeable increase in the mid-1920’s, due to the interest of the media entrepreneurs in the urban middle class (Luca 2008). Between 1920 and 1940 the urbanization rate doubled in Brazil.⁴⁴

In 1930, a coup led by the defeated presidential candidate Getúlio Vargas and backed by the Army puts an end to the Old Republic. The following year, Vargas creates a government

³⁹ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

⁴⁰ <http://www.oei.es/quipu/brasil/historia.pdf> - page 22

⁴¹ <http://www.oei.es/quipu/brasil/historia.pdf> - page 22

⁴² Source: Instituto Verificador de Circulação (IVC)

⁴³ <http://cidades.ibge.gov.br/xtras/perfil.php?codmun=330455>

⁴⁴ <http://www.oei.es/quipu/brasil/historia.pdf>

department specifically for political propaganda and information control. Within Vargas' political project, the media is essential to create a new national identity that encompasses the urban workers (Barbosa 2007), an increasingly important group in a country which is getting more and more urban. Controlled by the government, the tax-free import of newsprint was a powerful instrument to force the newspapers to comply with the political guidelines established by the state (Luca 2008), since this kind of paper was not manufactured in the country.

In 1937, Vargas is granted dictatorial powers by another coup and press freedom virtually disappears. By 1939 it was compulsory for all the periodicals to register with the department responsible for controlling press and propaganda. In all, 420 newspapers and 346 magazines were denied registration.⁴⁵ It's estimated that 30 percent of the existing publications at that time went out of business (Luca 2008). The (forced) departure of Vargas in 1945 initiates a new phase of press freedom that would last until 1964.

⁴⁵ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

3. The tricky mission of competing with television (1945-1994)

The rise of the media conglomerates

The end of World War II and the ouster of President Getúlio Vargas, both in 1945, affected positively the print press in Brazil as newspapers underwent a new cycle of technological modernization⁴⁶ and censorship was no longer a problem. During the war, there was hardly any technical improvement in the Brazilian print press since the major equipment suppliers for the media companies were based in developed countries that were using their manufacturing capacity for the war effort.⁴⁷ Newspaper printing was still precarious and the photographs transmitted by radio were not good quality.⁴⁸

Print press was heavily concentrated in the two major Brazilian cities: Rio de Janeiro and São Paulo. Back in 1945, eight out of nine publications with a circulation of more than a 100,000 copies were based in Rio de Janeiro (and just one in São Paulo).⁴⁹ Nowadays, there's still a large imbalance in the media sector: 85% of the TV and radio content broadcast in the country is generated in the Rio de Janeiro-São Paulo area (Herscovitz 2016).

Following World War II, the manufacturing of capital and consumer goods went back to normal and some of the technological discoveries made during the conflict were applied for non-military use.⁵⁰ By the late forties, the Brazilian economy was growing at an astonishing pace: 9.7 percent in 1948 and 7.7 percent in 1949.⁵¹

In the early 1950's, there are 230 dailies being published throughout the country, with a combined circulation of 5.75 million copies per day (Barbosa 2007, p.154). At that point, Brazil's population is around 52 million.⁵² In other words, for every group of a thousand people, there are 110,6 copies being sold. Almost seven decades later, in 2014, this ratio had fallen to almost a third (less than 36.7 copies per thousand people).⁵³

Along with new equipment brought from abroad, the Brazilian print press adopts major stylistic changes inspired by American newspapers. "Novelties" such as the lead and the inverted pyramid model are adopted by Brazilian news companies but the transition from a more ideological journalism - mainly concerned about expressing opinions - to a more objective and informative

⁴⁶ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

⁴⁷ *Ibid.*

⁴⁸ <http://observatoriodaimprensa.com.br/jornal-de-debates/a-midia-vai-a-guerra/>

⁴⁹ <http://www.ibge.gov.br/home/presidencia/noticias/29092003estatisticasecxhtml.shtm>

⁵⁰ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

⁵¹ <http://portalibre.fgv.br/main.jsp?lumChannelId=402880811D8E34B9011D97C18E8F0195>

⁵² <http://www.censo2010.ibge.gov.br/sinopse/index.php?dados=4&uf=00>

⁵³ Ratio calculated using demographic data from the World Bank (<http://data.worldbank.org/indicator/SP.POP.TOTL>) and circulation data from the Brazilian Association of Newspapers (<http://www.anj.org.br/circulacao-diaria-2/>)

way of narrating the facts was not a quick one, emphasizes Marialva Barbosa, professor at Universidade Federal Fluminense (UFF). “It was a long process that lasted almost the entire 20th century”, says the historian.

By the 1950’s, Brazilian journalism was undergoing an “informative utility” phase (Seabra 2002), in which clarity and conciseness are highly valued. The consolidation of the industrial model of news production is another characteristic of that period, which would last until 1960. These changes gather pace due to the emergence of new media outlets: radio and TV. Although radio had been introduced in Brazil in 1922,⁵⁴ its expansion would accelerate only during the two next decades. More than half of the existing 63 radio stations in 1937 had been installed in the previous three years.⁵⁵ Radio was particularly important in a country with continental dimensions and high illiteracy rates (Luca 2008). Between 1945 and 1960, Rádio Nacional - the most important radio station in Latin America during this period - received nearly 8 million letters from listeners (Guedes-Bailey and Jambeiro Barbosa 2008, p. 50). “Radio didn’t shake the print press in Brazil. Newspapers adapted themselves to this new reality”, analyzes professor Tania Regina de Luca (Unesp).

However, a second competitor - television - would prove to be far more ferocious over the next decades. The first commercial TV broadcasting in Brazil (and in South America) happened in September 1950, in São Paulo. It was watched by a very small audience: at that time there were only 200 television sets installed in Brazilian homes and 22 in the shop windows of 17 stores.⁵⁶ By 1963, just 7.5 percent of the Brazilian households had a TV set, whereas 27 percent had a gas cooker.⁵⁷ Television would become a popular medium with high household penetration only in the mid-1960’s (Porto 2012).

The owner of the first Brazilian TV station, Assis Chateaubriand, was also the founder of Diários Associados, the first commercial media conglomerate in the country. The group’s origins date back to 1924.⁵⁸ Chateaubriand’s example is far from being the exception in the Brazilian media landscape, wherein mainstream newspapers and magazines generally are part of print press conglomerates or media groups that include press and broadcasting (Guedes-Bailey and Jambeiro Barbosa 2008). Furthermore, the newspapers with higher circulation are owned by a few family groups (Porto 2011). Currently, seven media companies account for 80 percent of what is read, heard or seen in the country (Herscovitz 2016).

Throughout the 1950’s, the development of capitalism in Brazil paved the way for Gross Domestic Product (GDP) growth rates of up to 10.8 percent per annum,⁵⁹ thus creating a national market

⁵⁴ Source: personal interview with Tania Regina de Luca

⁵⁵ <http://www.ibge.gov.br/home/presidencia/noticias/29092003estatisticasecxhtml.shtm>

⁵⁶ <http://cultura.estadao.com.br/noticias/televisao,ha-60-anos-era-inaugurada-a-tv-tupi-primeira-emissora-de-tv-do-brasil,611809>

⁵⁷ <http://www.abinee.org.br/programas/imagens/livro.pdf> , page 21

⁵⁸ <http://www.diariosassociados.com.br/linhadotempo/decada20.html>

⁵⁹ <http://portalibre.fgv.br/main.jsp?lumChannelId=402880811D8E34B9011D97C18E8F0195>

for cultural products that flourished remarkably under the Juscelino Kubitschek government (1956-1961), according to Guedes-Bailey and Jambeiro Barbosa (2008). From 1945 to 1964, the private sector's advertising expands its share in the revenue of the media companies due to the modernization of the Brazilian economy. Consequently, for an increasing number of newspapers, the advertising revenues become larger than those of subscription and non-subscription sales.⁶⁰

TV shows its teeth

After Kubitschek's government, characterized by further increases in the levels of industrialisation and urbanization, the country went through a period of political turmoil that culminated in the military *coup d'état* of 1964. Censorship - banned by the 1946 constitution - is restored by the military. In the first years of the dictatorial regime, the most common form of censorship is a phone call to the newsroom forbidding the publication of news about a particular subject, but after 1968 - when tensions escalate between the military and some institutions of the civil society - censorship intensifies (Barbosa 2007). Prior censorship on the media is established in that year and would be abolished only in 1978.⁶¹

In an effort to disseminate the regime's ideology, building a single mindset within the society (Barbosa 2007), the military needed a media outlet with a national reach capable of drawing in the masses and appealing to the illiterate. At the same time, building a general telecommunications system - something the country didn't have yet - was vital for economic development and for security reasons, besides helping to reinforce a sense of national identity (Straubhaar c1989, p. 236). The government's plan to achieve these priorities would encompass subsidies to television infrastructure - including microwave and satellite relay systems - and favorable credit terms for the purchase of TV sets (Straubhaar, Olsen and Nunes 1993), among other measures. From 1960 to 1970, the number of TV stations soared from 15 to 63,⁶² while the volume of television sets in use in Brazil grew more than sevenfold.⁶³

Thanks to the policies enacted during the military regime (1964-1985), TV became the dominant information medium in the country (Straubhaar, Olsen and Nunes 1993). It was in this context that, in 1965, TV Globo was launched in Rio de Janeiro. The Brazilian broadcaster - founded by Roberto Marinho, who was already involved in the newspaper and radio businesses - emerged as the dominant media group between the late 1960's and the early 1970's, achieving a status of virtual monopoly as a result, in part, of the military's policy of national integration (Porto 2011). As a result, the Globo network now receives 75 percent of spending in television advertising in Brazil (Herscovitz 2016).

At the end of the 1960's, 90 percent of the country's newspapers were still based in Rio de Janeiro or São Paulo; and total circulation of Brazilian dailies was virtually stagnant due to the expansion

⁶⁰ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

⁶¹ <http://www1.folha.uol.com.br/folha/brasil/ult96u30481.shtml>

⁶² <http://www.ibge.gov.br/home/presidencia/noticias/29092003estatisticasecxhtml.shtm>

⁶³ <http://www.andi.org.br/sites/default/files/legislacao/02.%20Um%20perfil%20da%20TV%20brasileira.%2040%20anos%20de%20hist%C3%B3ria.pdf>

of the television (Barbosa 2007). At that point, there were 45.4 copies being published for every 1,000 people,⁶⁴ down nearly 60 percent from the figures of the early fifties.⁶⁵ The 1973 oil shock adds further pressure on the print press, as the price of the newsprint rises 87 percent from 1971 to 1974 (Barbosa 2007, p. 199). During the decade, the number of newspaper titles fell in the biggest cities, but market leaders were able to boost their circulation and, also, to adopt new technologies such as offset printing and phototypesetting.⁶⁶ In Rio de Janeiro, there were 22 dailies by 1950, 16 in 1960 and just 7 by the end of the 70's (Barbosa 2007, p. 199).

The military regime comes to an end in 1985 and during that decade Brazil experienced a surge in investigative journalism boosted by the rise of a more autonomous and market-driven press (Porto 2011). In terms of style, the Brazilian press had been departing from the traditional approach since the 1970's, embracing "interpretative journalism" in which stories would often explore different angles instead of following the strictly informative model (Seabra 2002). This shift not only reconnects Brazilian journalism with its literary roots but also stimulates the development of investigative skills among the reporters (Seabra 2002).

Investigative journalism gains further strength in 1992 with the impeachment of Fernando Collor de Mello, the first president to be elected by direct vote after the military dictatorship period. The crucial role of the print press in unveiling Collor's involvement in a huge corruption scheme seems to reinvigorate the newspapers: in 1992, paid-for dailies circulation grows 5.2 percent⁶⁷ over the previous year, despite 0.5 percent⁶⁸ contraction on the Brazilian GDP. The following year, newspaper sales jump 12 percent.⁶⁹ In 1995, Brazil was introduced to commercial Internet (Knight 2014) but the effects of this major breakthrough over the newspapers' revenues and circulation would be felt only in the next decade.

⁶⁴ Ratio based on the proportion of one newspaper for every 22 inhabitants. This number appears on page 176 of Marialva Barbosa's book "História cultural da imprensa - Brasil - 1900-2000"

⁶⁵ Percentage variation calculated using demographic data from the Brazilian Institute of Geography and Statistics (<http://www.censo2010.ibge.gov.br/sinopse/index.php?dados=4&uf=00>) and circulation data from Marialva Barbosa's book "História cultural da imprensa - Brasil - 1900-2000", page 154

⁶⁶ http://www.anj.org.br/wp-content/uploads/Imprensa_Brasileira_dois_seculos_de_historia.pdf

⁶⁷ <http://www.anj.org.br/circulacao-diaria-2/>

⁶⁸ <http://www.bcb.gov.br/pec/boletim/banual97/banualc1.asp?idpai=BOLETIM1997>

⁶⁹ <http://www.anj.org.br/circulacao-diaria-2/>

4. The digital revolution and the ‘Inclusionary Decade’ (1994-2015)

New heights

Near the turn of the 21st century, the newspaper industry in Brazil hardly had any reason to be pessimistic about the future. Paid-for dailies circulation, which was nearly 4.3 million copies per day in 1990, had gone up almost 70 percent, to 7.2 million, by 1999.⁷⁰ The number of daily titles also increased remarkably from 313 to 465, a 48.5% hike in 1990-99, though growth was concentrated exclusively in the regional media.⁷¹ Rising newspaper sales were in part a consequence of the successful macroeconomic policies initiated in 1994. Known as “Plano Real”, the stabilization program conducted by the government resulted in a sharp decline of inflation rates, enabling some of the poorer segments of the population to consume more services and goods, including newspapers (Stycer 2015).

Internet penetration was still extremely low in Brazil by the mid-1990s - less than one user for every group of a hundred people⁷² - but this did not stop the major print groups venturing onto the web. Virtually all of them had websites by 1996, including the publishing companies of the best-selling newspapers in the country (“Folha de S. Paulo”, “O Globo”, “Estado de S. Paulo”) and the magazine publishing giant Abril (Pinho 2003, p.114). In Brazil, portals with focus on content (including news) were born inside journalistic companies (Ferrari 2014), while in United States newspaper companies initially established partnerships with online service providers, such as AOL and Prodigy (Herndon 2012).

As happened in other countries (Bastos 2015), in the mid-1990’s Brazilian news sites were simply duplicating the content originally produced for a parent publication (Mielniczuk 2003). “Initially the website of ‘O Globo’ only mirrored the language of the newspaper. The content was simply transposed from one media to another”, recalls Claudia Sarmento, a former editor and correspondent in Japan for “O Globo”. Brazilian online journalism entered a second phase in the late 1990’s. Although the websites were still tied to the print editions, new interactive features were added in an attempt to explore the possibilities of the Internet (Mielniczuk 2003). A third phase would come with the inclusion of multimedia and interactive features (Mielniczuk 2003), as the Internet grew in popularity throughout the 2000’s.

In the case of “O Globo”, the turning point toward a more interactive digital coverage in real time came in 2001 with the terrorist attacks of September 11, says Sarmento, who joined the newspaper in 1994. “News sites were uploading amateur videos and photos shot by people on the streets”, adds the journalist. “O Globo’s website crashed because people were no longer willing to wait for the next day’s newspaper. That day we published an extra edition of the paper. Who would do such a thing today?”

⁷⁰ <http://www.anj.org.br/circulacao-diaria-2/>

⁷¹ Newman, Nic, Levy, David A. L. and Nielsen, Rasmus Kleis. *Reuters Institute digital news report*. Oxford: Reuters Institute for the Study of Journalism, 2015

⁷² <http://data.worldbank.org/indicator/IT.NET.USER.P2?page=3>

Back then, the supremacy of the print media over the news sites was fully supported by figures. In June 2001, the estimated audience of news websites in Brazil was 1.22 million users, a number that would grow approximately 130 percent within one year (Pinho 2003, p.116). On the other hand, circulation of paid-for dailies was approaching 8 million by the end of 2000,⁷³ driven mainly by the economic recovery of the country after two years of stagnation and by the success achieved by newspapers of popular appeal.⁷⁴

Additionally, Brazilian newspapers were in a rather comfortable position in terms of advertising revenue. In 2000, five years after the Internet's commercial debut in Brazil, the newspapers' share of the national advertising market was 21.5 percent.⁷⁵ Despite the variation in numbers year to year, that figure was not a significant departure from the results obtained - for instance - in 1950 (23 percent) and 1960 (18 percent) (Ferrareto 2002, p. 64), when television was not such a powerful competitor.

However, there were already some dark clouds on the horizon, as the growth of advertising revenues of the Brazilian newspaper industry remained below that of the national average in 2000.⁷⁶ By 2014, the share of the newspapers in the country's advertising market had shrunk to 11.4 percent.⁷⁷ "Looking back, I don't think there was a lack of [strategic] vision. We were going with the tide, following the [newspaper] industry", says Claudia Sarmento. "At that time, the Internet was not a priority."

Telecom services penetration received a major boost in Brazil with the privatization of the sector in 1998. Just one year later the number of active landlines had soared 25 percent (to 25 million), while the mobile telephony market had doubled in size, reaching 15 million lines.⁷⁸ Internet access was also growing at a fast pace - between 1998 and 2001 the number of web users rose from 2.5 million to 8 million.⁷⁹ But the figures were still low for a country that had more than 170 million inhabitants at the beginning of the new millennium.⁸⁰ It would take more 12 years for the Internet to reach half of the Brazilian population - something that happened only in 2013.⁸¹

Mobile Internet was already available in Brazil by 2000 but the poor performance of the service based on the Wireless Application Protocol (WAP) was initially frustrating for its users (Ferreira

⁷³ <http://www.anj.org.br/circulacao-diarica-2/>

⁷⁴ World Association of Newspapers (WAN). *World press trends*, 2001 ed. Paris: World Association of Newspapers, 2001

⁷⁵ *Ibid.*

⁷⁶ *Ibid.*

⁷⁷ <http://www.meioemensagem.com.br/home/midia/noticias/2015/04/27/Mercado-cresce-1-5-porcento-em-2014.html>

⁷⁸ Source: Brazilian Association of Telecommunications (Telebrasil) - http://www.telebrasil.org.br/component/docman/doc_download/1289-o-desempenho-do-setor-de-telecom-series-temporais-1t14?Itemid= , page 39

⁷⁹ Source: Brazilian Association of Telecommunications (Telebrasil) - http://www.telebrasil.org.br/component/docman/doc_download/1289-o-desempenho-do-setor-de-telecom-series-temporais-1t14?Itemid= , page 144

⁸⁰ <http://data.worldbank.org/indicator/SP.POP.TOTL?page=2>

⁸¹ http://www.bbc.com/portuguese/noticias/2015/04/150429_divulgacao_pnad_ibge_lgb

2007). Nevertheless, the print press wasted no time in embracing the new technology. In March 2000, the publishing company of “Folha de S. Paulo” launched a mobile website, a decision that was quickly followed by other major players, such as “Estado de S. Paulo”, Abril and Yahoo!, (Ferreira 2007). The enthusiasm for the new technology was a reflection, on a smaller scale, of the Internet Bubble that was about to burst in the United States (Ferreira 2007).

A popular readership

Still, in the bricks-and-mortar world, Brazilian newspaper companies were placing their bets on dailies of popular appeal. By 2000, of the 12 Brazilian newspapers with highest circulation, six were considered of popular appeal.⁸² Of these titles, three had entered the market in the previous three years.⁸³ Sensationalist press was already a success in Brazil by the beginning of the 20th century - crime and disaster stories were increasingly replacing political headlines on the cover of most of the newspapers in Rio de Janeiro during the 1920’s (Barbosa 2007).

Though the popularity of the yellow press never faded in Brazil, it would experience a great leap forward between the late 1990’s and early 2000’s. “The phenomenon of popular newspapers was the result of a virtuous circle that happened between the end of [President] Fernando Henrique Cardoso’s government and the beginning of the Luiz Inácio Lula da Silva’s presidency”, argues Ricardo Pedreira, executive director of the National Association of Newspapers (ANJ). “We had the sense that there was a market to be conquered.”

Companies were successful - says Pedreira - in attracting a new readership, especially the new middle class that recently flourished in Brazil. By 2008, a regional tabloid - “Super Notícia” - was the second best-selling newspaper in the country,⁸⁴ just behind “Folha de S. Paulo”, a highly influential paper with national coverage. And three years later, in 2011, “Super Notícia” became the market leader, a position that the tabloid held until 2013.⁸⁵ “A new readership emerged, [people] that didn’t use to buy newspapers”, explains Pedreira.

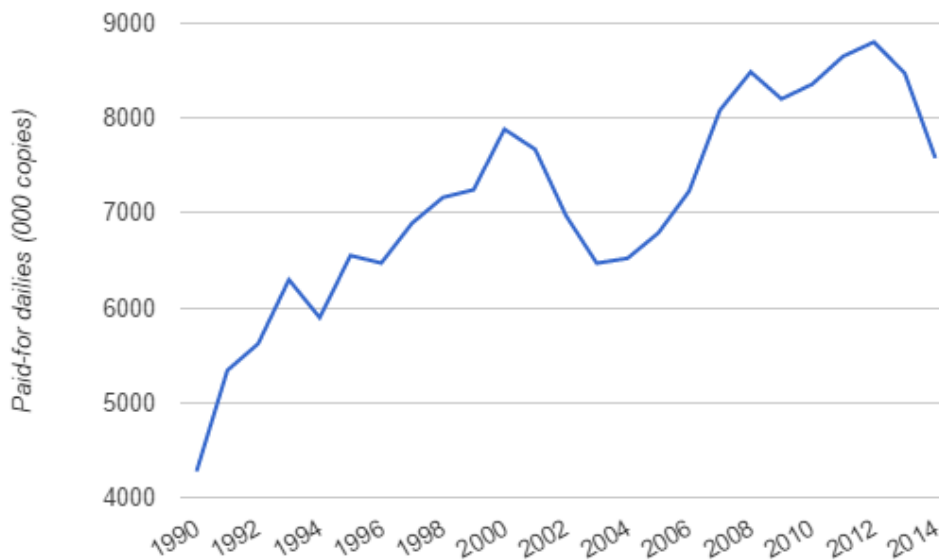
⁸² World Association of Newspapers (WAN). *World press trends*, 2001 ed. Paris: World Association of Newspapers, 2001

⁸³ *Ibid.*

⁸⁴ Source: Instituto Verificador de Comunicação (IVC)

⁸⁵ *Ibid.*

Chart 1: Average daily circulation in Brazil (1990-2014)



Source: National Association of Newspapers (ANJ)

In fact, between 2001 and 2011⁸⁶, a period known as the “Inclusionary Decade”, the country went through a major social transformation, as the Gini coefficient (an inequality indicator) declined to its lowest recorded level and as the incomes of the poor expanded at triple the rates of those of the rich (Power 2016). In 1993, the percentage of Brazilians that lived under the poverty line was around 43 percent, a number that fell considerably after hyperinflation had been tamed but remained steady at 35-36 percent between 1995 and 2002, only to decrease again throughout the rest of the decade (Power 2016). In 2010, the poverty rate had decreased to 20 percent (Power 2016).

After 2003, newspaper sales enjoyed five consecutive years of growth, with circulation topping 8 million in 2007⁸⁷ and reaching 8.8 million in 2012 (the best result in more than two decades⁸⁸), as shown in the chart above. But, while circulation broke records, advertising expenditures in papers rose only 9% between 2007 and 2012⁸⁹ in local currency. In the meanwhile, total advertising expenditure in Brazil (including other media) increased 61% within this time frame.⁹⁰ “Until 2008, advertising expenditure used to be in line with demographic growth, but the entry of new global players, such as Google and Facebook, has messed up the market. The competition for a slice in the ‘advertising cake’ became harder and the market now is more fragmented”, Pedreira points

⁸⁶ http://www.ipea.gov.br/portal/images/stories/PDFs/comunicado/120925_comunicado155rev3_final.pdf

⁸⁷ <http://www.anj.org.br/circulacao-diarica-2/>

⁸⁸ Circulation data from 1990 to 2014 available on <http://www.anj.org.br/circulacao-diarica-2/>

⁸⁹ Source: World Press Trends Database

⁹⁰ *Ibid.*

out. According to the Instituto Verificador de Comunicação (IVC), which is a nonprofit entity responsible for the circulation auditing of major newspapers, the paid-for dailies digital circulation expanded 118 percent in 2014, but Pedreira admits that “profitability is lower even in the digital editions.”

Actually, between 2011 and 2014 the publishing company of “O Globo” slipped from the 391st to the 581st position among the 1,000 largest Brazilian companies - the ranking is published annually by the financial newspaper “Valor Econômico”.⁹¹ During the same period, the net profit of Grupo Estado - the publishing company of the traditional newspaper “O Estado de S. Paulo” - was cut to one third,⁹² despite the fact that the circulation of the daily had only slight fluctuations.⁹³ Another newspaper, “Zero Hora” - which had the fifth largest circulation in Brazil by July 2015 - reported financial losses in 2013 and 2014.⁹⁴ The newspaper industry in Brazil closed 2014 with a paid-for dailies circulation of 7.57 million.⁹⁵ This represented a 10.59 percent contraction compared to 2013, when the National Association of Newspapers (ANJ) had already reported a 3.69 percent decline in circulation.⁹⁶

⁹¹ In the latest ranking, the company appears under the name O Globo/Extra (http://www.valor.com.br/valor1000/2015/ranking1000maiores/Comunica%C3%A7%C3%A3o_e_Gr%C3%A1fica), while in the 2013 ranking its name is Infoglobo (http://www.valor.com.br/valor1000/2013/ranking1000maiores/Comunica%C3%A7%C3%A3o_e_Gr%C3%A1fica)

⁹² Source: consolidated financial statements of the company, available on <http://www.estadao.com.br/relatorio-da-administracao/DF%20Dez14%20Combinado%20com%20parecer.pdf> and <http://www.estadao.com.br/relatorio-da-administracao/DF%20Dez11%20SA%20consolidado%20com%20parecer.pdf>

⁹³ Source: Instituto Verificador de Comunicação (IVC)

⁹⁴ http://www.valor.com.br/valor1000/2015/ranking1000maiores/Comunica%C3%A7%C3%A3o_e_Gr%C3%A1fica and http://www.valor.com.br/valor1000/2014/ranking1000maiores/Comunica%C3%A7%C3%A3o_e_Gr%C3%A1fica

⁹⁵ <http://www.anj.org.br/circulacao-diaria-2/>

⁹⁶ Calculations based on circulation data available on <http://www.anj.org.br/circulacao-diaria-2/>

5. A journey towards irrelevance?

Some really bad news

When paid-for dailies circulation peaked at 8.8 million copies in 2012, it seemed that the Brazilian newspaper industry had reached the Promised Land. But a deeper look - beyond the raw circulation data - shows that print press was rapidly losing its capacity to reach a sizeable readership in the country. Between 2010 and 2014, the percentage of adults that read newspapers daily in Brazil shrunk from 27 percent to 21 percent⁹⁷, according to the World Association of Newspapers and News Publishers (WAN-IFRA). Herscovitz (2016) outlines an even more dramatic scenario, using data from the National Association of Newspapers (ANJ): readership of daily print newspapers among adults fell 51 percent in 2010-13. Though the frequency for the data may vary - some surveys consider the daily readership while others estimate the weekly or monthly reach of the papers - there is no recent sign of a shift of that magnitude among nearby countries - such as Chile, Colombia and Peru - and also among other BRICS nations (China, Russia, India and South Africa)⁹⁸ – see Table 2 and Table 3.

% of all adults	2010	2011	2012	2013	2014	Frequency
Argentina	44.4	42.6	40.1			Monthly
Brasil	27	27	26	24	21	Daily
Chile			65	68.3	63.2	Weekly
Colombia				63	67	Monthly
Peru	48.2	49	48.4	51	49.2	Weekly

Sources: World Press Trends / Ipsos / [TGI Latina](#) / [Asociación Colombiana de Investigación de Medios - Estudio General de Medios Colombia III - 2013](#) / [Departamento Administrativo Nacional de Estadística \(DANE\)](#) / [KantarMedia Research Peru Anuario 2015 \(newspaper reach in Lima\)](#)

(% of all adults)	2010	2011	2012	2013	2014
China	66.8	63.1		39.8	39.8
India	41.8*	41.8*			
Russian Federation	7	6.1	8.5	10.4	9.1
South Africa	29	31	30.9	29.8	

Sources: "World Press Trends 2015" report / World Press Trends Database / Ipsos - *Figure 2009
[Weekly](#) / [daily](#)

⁹⁷ Source: World Press Trends Database

⁹⁸ Sources: World Press Trends Database, TGI Latina, ACIM Colombia, Departamento Administrativo Nacional de Estadística (DANE) and KantarMedia Research Peru Anuario 2015

This major shift has been going on in the Brazilian market at least since the end of the 1990's, but at a rather slow rate.⁹⁹ Then, after a period of relative stability between 2007 and 2011, the newspaper reach indicator started to drop sharply.¹⁰⁰ Even though paid circulation achieved a record level in 2012, it rose only 1.8 percent in comparison to the previous year and this expansion was fueled by online access (Herscovitz 2016). "There's a major change going on in terms of reading platforms. Do we have an idea of what this will mean for the print newspaper in the future? Not yet. It's still too early to say", admits Ricardo Pedreira.

Not long ago, the future seemed brighter. In 2011, a special report about the news industry published by "The Economist" highlighted the fast increase of print paid circulation in Brazil and India.¹⁰¹ From 2005 to 2009, average circulation of Brazilian papers climbed 20.7 percent, almost twice the growth of the Chinese paid-for newspapers during the same period.¹⁰² Nevertheless, the magazine questioned if the interest in news in Brazil and India would survive the spread of Internet access. In the case of Brazil, it clearly didn't. Circulation fell in 2013 and 2014¹⁰³ and advertising expenditures in newspapers also dropped 11.6 percent within this period.¹⁰⁴ "Circulation fell less than it should, thanks to the popular newspapers and magazines", says Professor Jorge Tarquini, coordinator of the postgraduate programme in digital journalism at the Superior School of Advertising and Marketing (ESPM), in São Paulo.

To be sure, recent circulation figures are useful to the understanding of the changes that the Brazilian print press is going through, but - on the other hand - Meyer (2009) warns us that raw circulation "is fraught with ambiguity". That is to say, to have a consistent measure of the business success within the newspaper industry, is necessary to adopt a broader perspective, analyzing the change in circulation over relevant time periods and also examining penetration data - circulation divided by households (Meyer 2009). In this paper, we measure penetration by the number of copies sold for every group of a 1,000 people, since population data are more easily available than those related to households in Brazil.

Taking a more long-term approach, it becomes clear how the media in Brazil evolved from a scenario where the press was the dominant player, in the first half of the 20th century, to one in which mass broadcasting industry occupied centre stage (Matos 2012). In the early fifties, total paid-for dailies circulation was 5.75 million (Barbosa 2007, p. 154) within a total Brazilian population of around 52 million.¹⁰⁵ That meant a penetration of 110.6 copies per 1,000 people.¹⁰⁶ By the end of the 1960's, when television was on its way to become the dominant media outlet in

⁹⁹ Source: World Press Trends Database

¹⁰⁰ *Ibid.*

¹⁰¹ <http://www.economist.com/sites/default/files/special-reports-pdfs/bulletins-from-the-future.pdf>

¹⁰² <http://www.economist.com/sites/default/files/special-reports-pdfs/bulletins-from-the-future.pdf>

¹⁰³ <http://www.anj.org.br/circulacao-diaria-2/>

¹⁰⁴ <http://www.meioemensagem.com.br/home/midia/noticias/2015/04/27/Mercado-cresce-1-5-porcento-em-2014.html>

¹⁰⁵ <http://www.censo2010.ibge.gov.br/sinopse/index.php?dados=4&uf=00>

¹⁰⁶ Ratio calculated using demographic data from the Brazilian Institute of Geography and Statistics (<http://www.censo2010.ibge.gov.br/sinopse/index.php?dados=4&uf=00>) and circulation data from the book "História Cultural da Imprensa: Brasil - 1900-2000", by Marialva Barbosa, page 154

Brazil (Porto 2012), that ratio plunged to 45.4 copies sold for every group of a 1,000 people.¹⁰⁷ In 2014, penetration had tumbled to 36.7.¹⁰⁸ However, to blame television for the underperformance of the print press in Brazil in the past six decades would mean ignoring other factors that were presented in the previous sections of this paper. According to Straubhaar, Olsen and Nunes (1993), the role of television is enhanced by the weakness in other media structures and the limits on audience access to other media in Brazil.

Until recently, newspapers were generally elite-oriented in the country (Matos 2008). On a historical perspective, this characteristic can be traced back to the origins of the print press in Brazil, much more connected to the elites than to the population's poorer strata. The first two Brazilian papers were published, respectively, by a former diplomat exiled in London ("Correio Braziliense") and by the Portuguese Crown ("Gazeta do Rio"). From that starting point, it took decades for the newspapers to become market-oriented businesses, simply because there was hardly a market at all: besides the prohibition of any print until 1808, a low literacy rate combined with the absence of a working class and a bourgeoisie (Sodré 1977) proved to be remarkable obstacles for the Brazilian press.

As pointed out by the professor Tania Regina de Luca in the second section of this paper, the late development of the educational system and, consequently, the weakness of the cultural industry also hindered the formation of a readership. Other factors such as the continental size of the country and the poor transport infrastructure limited for decades the reach of the national newspapers.

The "Dilution Trend"

Nevertheless, despite all these obstacles, Brazilian dailies managed to increase circulation throughout the second half of the 20th century and the first decade of the new millennium, though the pace of this expansion varied greatly. From 1950 to 1978, paid circulation increased at an average year-on-year growth rate (CAGR or Compound Annual Growth Rate) of 0.11 percent.¹⁰⁹ But by the end of the eighties, a decade plagued by a sharp drop in economic growth and significant increase in inflation,¹¹⁰ paid circulation in Brazil was lower than in the early 1950's.¹¹¹

Reinvigorated by a new wave of investigative journalism that culminated in the impeachment of President Fernando Collor de Mello (1992) and by the macroeconomic stability brought by Plano Real (1994), the newspaper industry expanded at a quick pace over the nineties. Between 1991 and 2000, the Compound Annual Growth Rate (CAGR) for paid circulation in Brazil was 4.42

¹⁰⁷ Ratio calculated using data from the book "História Cultural da Imprensa: Brasil - 1900-2000", by Marialva Barbosa, page 176

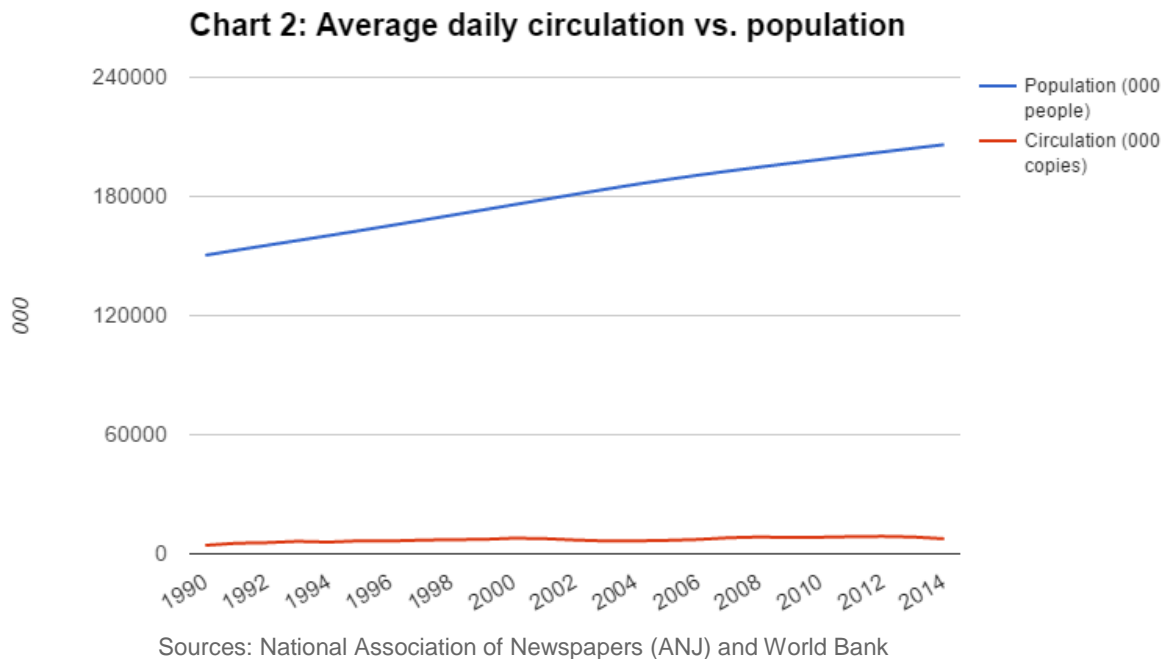
¹⁰⁸ Ratio calculated using demographic data from the World Bank (<http://data.worldbank.org/indicator/SP.POP.TOTL>) and circulation data from the National Association of Newspapers (<http://www.anj.org.br/circulacao-diarica-2/>)

¹⁰⁹ Rate calculated using data from the National Association of Newspapers (ANJ) (<http://www.anj.org.br/circulacao-diarica-2/>)

¹¹⁰ <http://www.brasil.gov.br/economia-e-emprego/2012/04/inflacao>

¹¹¹ Comparison based on circulation data from the book "História Cultural da Imprensa: Brasil - 1900-2000", by Marialva Barbosa (page 154), and from the "World Press Trends 1994" report, by WAN-IFRA

percent,¹¹² a number that fell to 0.96 percent in 2001-10¹¹³ and to minus 4.31 percent in 2011-14.¹¹⁴ At same time, demographic growth rate across these three different periods was 1.56 percent, 1.20 percent and 0.92 percent, respectively.¹¹⁵ If this trend continues, the natural consequence would be a further dilution of the newspapers' reach and influence. With circulation expanding at a slower pace than population, dailies would be read by a diminishing share of the Brazilian population. This slowdown has taken its toll on the newsrooms. Over 1,200 journalists lost their jobs in 2012 and, in São Paulo, the main media hub in the country, 280 professionals were fired in the first semester of 2013 (Herscovitz 2016).



As a note, it's important to clarify that in its "World Press Trends 2015" report, WAN-IFRA estimates a total paid-for dailies average circulation of 8.47 million in Brazil for 2014, a figure which is 10.6 percent higher than the one presented by the National Association of Newspapers (ANJ).¹¹⁶ Nevertheless, even if we consider this favourable piece of data, the "dilution trend" would continue, since the average year-on-year growth rate would remain negative (- 0.67 percent)¹¹⁷ and therefore lower than the population increase in 2011-2014. Curiously, both associations have almost identical figures for the 2010-13 period.

Blame it on the Internet?

¹¹² Rate calculated using circulation data from ANJ (<http://www.anj.org.br/circulacao-diarica-2/>)

¹¹³ *Ibid.*

¹¹⁴ *Ibid.*

¹¹⁵ Rate calculated using population data from World Bank (<http://data.worldbank.org/indicator/SP.POP.TOTL>)

¹¹⁶ <http://www.anj.org.br/circulacao-diarica-2/>

¹¹⁷ Rate calculated using circulation data from the World Press Trends Database

By the end of 2013, Internet access was available to more than half of the Brazilian population.¹¹⁸ That same year, “Folha de S. Paulo” - the best-selling daily in Brazil nowadays - had a monthly audience of 21 million unique visitors in its web page, while the print edition of the paper was selling an average of 294,812 copies per day,¹¹⁹ a relatively low circulation considering that the newspaper is based in São Paulo, a city with a population of 11.9 million at that time (Herscovitz 2016). As other major players in the Brazilian media market, Grupo Folha - the owner of the newspaper - debuted on the Internet in the 1990's (Pinho 2003). These traditional news brands are facing increasing pressure as advertisers flock to Google and Facebook instead of spending their money on prominent news sites (Herscovitz 2016).

In fact, the Brazilian Media Survey 2014 (“Pesquisa Brasileira de Mídia 2014”) - a massive study sponsored by the federal government - showed that nearly 31 percent of the Internet users in the country consider Facebook their main online “source of information”. Traditional news websites were ranked lower, in spite of being part of huge media conglomerates. After Facebook, the next most mentioned brands were Globo.com (6.8 percent) and G1 (5 percent), both owned by the mammoth media company Grupo Globo.¹²⁰

The influence of Facebook and its peers on the way Brazilians consume journalistic content is also evident if we consider that social media are the starting point for almost half of the people searching online for news in urban Brazil.¹²¹ In January 2015, Brazil had nearly one active social media account for every two inhabitants.¹²² Between 2011 and 2014, the number of Facebook users in the country grew more than six times to 89 million.¹²³ Moreover, approximately 100 million Brazilians were using the mobile messaging service WhatsApp in December 2015.¹²⁴

Together, these figures help to explain why 34 percent of the urban population in Brazil use WhatsApp for news¹²⁵ while 47 percent share journalistic content through social networks.¹²⁶ Indeed, a study presented by the market research firm comScore in 2015 showed that the average amount of time that Brazilians spend browsing through social media is 80% higher than that on web portals.¹²⁷

¹¹⁸ <http://data.worldbank.org/indicator/IT.NET.USER.P2>

¹¹⁹ Source: Instituto Verificador de Comunicação (IVC)

¹²⁰ <http://www.fncc.org.br/download/pesquisa-brasileira-de-midia-2014-habitos-de-consumo-de-midia-pela-populacao-brasileira/publicacoes/198/arquivo/pesquisabrasileirademidia2014.pdf> (page 58)

¹²¹ Newman, Nic, Levy, David A. L. and Nielsen, Rasmus Kleis. *Reuters Institute digital news report*. Oxford: Reuters Institute for the Study of Journalism, 2015 and Fletcher, Richard, Radcliffe, Damian. *Reuters Institute digital news report: supplementary report*. Oxford: Reuters Institute for the Study of Journalism, 2015

¹²² Source: We Are Social (<http://pt.slideshare.net/wearesocialsg/digital-social-mobile-in-2015/72-We-Are-Social-wearesocialsg-72ACTIVEINTERNET>), slide 72

¹²³ <http://www.emarketer.com/Article/Social-Network-Facebook-Base-Latin-America-Smaller-than-Expected/1009420> (2010) and http://www.bbc.com/portuguese/noticias/2014/10/141028_eleicoes2014_internet_rb (October 2014)

¹²⁴ <http://www1.folha.uol.com.br/tec/2016/02/1736093-whatsapp-quega-a-1-bilhao-de-usuarios.shtml>

¹²⁵ Newman, Nic, Levy, David A. L. and Nielsen, Rasmus Kleis. *Reuters Institute digital news report*. Oxford: Reuters Institute for the Study of Journalism, 2015

¹²⁶ *Ibid.*

¹²⁷ <http://www.comscore.com/por/Imprensa-e-eventos/Apresentacoes-e-documentos/2015/Futuro-Digital-Global-em-Foco-2015>

Currently, social media is the biggest Internet category in terms of time spent by Brazilians, well ahead of the services, entertainment and retail pages, according to comScore. The same study revealed that Facebook had 58.7 million monthly unique visitors in Brazil in the first quarter of 2015 - that's more than two times the audience of the portal G1,¹²⁸ which claims to be the number one among the news sites in Brazil. Professor of International Communication at the University of Westminster, Daya Thussu believes that digital heavyweights - such as Facebook and Google - pose a serious threat to legacy media conglomerates that hold almost monopolistic positions in emerging markets like Brazil. "Some people now argue that Google is the biggest media company today, because it aggregates media from all parts of the world. It's a place that gives people from all over the world access to the media", says the academic.

Internet penetration was still low in Brazil in 2014 (57.6 percent), especially when compared to that of developed markets, but by 2015 online media (including social media) had surpassed TV as the main source of news in the urban areas of the country.¹²⁹ Though this shift towards the digital environment has been the result of many variables, it's unlikely that it would have happened without the drive of the major economic and social improvements that swept through the country in the last 20 years. During the "Inclusionary Decade" (2001-11), the number of personal computers in Brazil rose eight and a half times to 91.6 million,¹³⁰ while penetration of the mobile telephony service skyrocketed from 16.3 percent to 122.7 percent.¹³¹

Paradoxically, the same economic and social changes that boosted the sales of newspapers in the 1990's and the 2000's are now putting pressure on the Brazilian print press. Even though the potential newspaper readership has grown in the country, an increasing number of Brazilians is moving away from newspapers at an unprecedented speed when compared to the previous decade (see Table 4).

Table 4: A digital snapshot of the recent past					
BRAZIL	2010	2011	2012	2013	2014
News reach (% of all adults)	27	27	26	24	21
Internet users (per 100 people)	40.7	45.7	48.6	51	57.6
Smartphone sales (mln units)	4.8	9.1	16	35.2	54
Facebook users (mln)	7.3	14	46.5	61.2	89

Sources: World Press Trends Database / [World Bank](#) / [IDC](#) / [eMarketer](#) / brasileconomico.ig.com.br/negocios/2014-05-19/esta-e-a-eleicao-das-redes-sociais.html / www.bbc.com/portuguese/noticias/2014/10/141028_eleicoes2014_internet_rb

¹²⁸ <http://anuncie.globo.com/redeglobo/sites/home.html>

¹²⁹ Newman, Nic, Levy, David A. L. and Nielsen, Rasmus Kleis. *Reuters Institute digital news report*. Oxford: Reuters Institute for the Study of Journalism, 2015

¹³⁰ Source: Brazilian Association of Telecommunications (Telebrasil) - http://www.telebrasil.org.br/component/docman/doc_download/1289-o-desempenho-do-setor-de-telecom-series-temporais-1t14?Itemid , page 98

¹³¹ Source: Brazilian Association of Telecommunications (Telebrasil) - http://www.telebrasil.org.br/component/docman/doc_download/1289-o-desempenho-do-setor-de-telecom-series-temporais-1t14?Itemid , page 144

By way of comparison, in Colombia - where Internet penetration was at 52.6 percent in 2014, according to the World Bank - the percentage of people who read a newspaper at least once a month rose from 63 to 67 percent in 2013-14.¹³² On a daily basis, 34 percent of the Colombians were reading a paper in 2013,¹³³ while in Brazil this figure was significantly lower (24 percent) at that time.¹³⁴ In the United States, a country in which nearly one in ten adults get their news via Twitter and four in ten get their news through Facebook,¹³⁵ 41.6 percent of the adults were reading a paper at least once a week in 2013.¹³⁶ Weekly readership of daily print newspapers among adults in Chile was at 63.2 percent in 2014,¹³⁷ despite the fact that Internet penetration was then much higher (72.4 percent)¹³⁸ than in Brazil. Though this paper is solely focused on the Brazilian newspaper industry, these comparisons help to reinforce how complex are the variables that are shaping the current media landscape in the country.

¹³² Source: Departamento Administrativo Nacional de Estadística (DANE) - Encuesta de Consumo Cultural (<http://www.mediosencolombia.com/consumo-de-la-prensa-en-colombia/>)

¹³³ Source: Asociación Colombiana de Investigación de Medios (ACIM) - Encuesta General de Medios (<http://www.mediosencolombia.com/consumo-de-la-prensa-en-colombia/>)

¹³⁴ Source: World Press Trends Database

¹³⁵ http://www.journalism.org/2015/07/14/the-evolving-role-of-news-on-twitter-and-facebook/pj_2015-07-14_twitter-and-news_03/

¹³⁶ World Association of Newspapers (WAN). *World press trends*, 2014 ed. Paris: World Association of Newspapers, 2014

¹³⁷ *Ibid.*

¹³⁸ <http://data.worldbank.org/indicator/IT.NET.USER.P2>

Conclusions

The 2010's have been so far a turning point for the newspaper industry: not only has paid circulation been declining but readership of papers among Brazilian adults is shrinking at an unprecedented rate when compared to the past decade. In 2011-14, the percentage of adults that read newspaper daily decreased at an average year-on-year rate of minus 8 percent.

Though recent technological breakthroughs - such as Internet and social media - contribute to this downward trend, historical variables are essential for understanding the chronic feebleness of the newspaper industry in the country. Proof of this can be found by comparing penetration and circulation figures. Between the early fifties and 2014, the number of copies sold per 1,000 people suffered a sharp drop while paid-for dailies circulation rose 31.8%.

Much of this growth in circulation happened during the last 20 years, a period in which profound social and economic improvements have changed the consumption patterns in Brazil. However, the very same factors that lifted tens of millions of Brazilians out of poverty and into the new middle class - boosting newspaper circulation to new levels during the 1990's and the 2000's - also made room for an increase in the use of digital goods and services. And these devices and apps are now altering the way Brazilians consume news.

Circulation has been expanding in Brazil at a slower rate in the last 15 years when compared to the demographic growth. As a result of this "dilution trend" the share of the population that reads a newspaper is diminishing. On average, Brazilians are more educated and have a higher income today than 20 years ago but they simply don't want to spend their money buying dailies. Firstly, because reading newspapers have never been a habit between the poorer strata of society, especially outside Rio de Janeiro and São Paulo. And secondly because of the explosion of free news content on the Internet.

Data suggest that the skyrocketing popularity of social media in the country is having an important role in putting additional pressure on the print media. Currently, Facebook reaches a much larger audience compared to most (if not all) Brazilian news sites. Although it is not yet possible to fully evaluate the effects of the massive use of social media on the reading habits of the Brazilian population, it's clear that newspapers are increasingly becoming a niche product due to a steady migration of advertisers and readers from print to online.

Despite their relatively small circulation, national dailies are still influential in the country. However, this prominent position tends to be called into question as readership shrinks. Media companies may still be publishing newspapers 20 years from now - like oil companies that explore mature oil fields just to pump a few barrels of crude every day, as long as the wells are profitable. The question is will these "few barrels" make any difference in an environment utterly flooded by information? The current course is heading towards a future of irrelevance and, right now, there's little evidence that the newspaper industry in Brazil will be able to reinvent itself in a more long-lasting and profitable way.

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