News Leaders and the Future:

News Executives, Skeptical of Government Subsidies, See Opportunity in Technology but Are Unsure About Revenue and the Future

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PROJECT FOR EXCELLENCE IN JOURNALISM

ASNE
LEADING AMERICA'S NEWSROOMS

RTNA
RADIO TELEVISION DIGITAL NEWS ASSOCIATION

America's news executives are hesitant about many of the alternative funding ideas being discussed for journalism today and are overwhelmingly skeptical about the prospect of government financing, according to a new survey by the Pew Research Center's Project for Excellence in Journalism in association with the American Society of News Editors (ASNE) and the Radio Television Digital News Association (RTDNA).

Many news executives also sense change for the better in their newsrooms today, despite cutbacks and declining revenue. Editors at newspaper-related companies praise the cultural shifts in their organizations, the younger tech-savvy staff, and a growing sense of experimentation. Many broadcast executives see so-called one-person crews—in which the same individual reports, produces and shoots video—as improving their journalism by getting more people on the street.

But the leaders of America's newsrooms are nonetheless worried about the future. Fewer than half of all those surveyed are confident their operations will survive another 10 years—not without significant new sources of revenue. Nearly a third believe their operations are at risk in just five years or less. And many blame the problems not on the inevitable effect of technology but on their industry's missed opportunities.

"Our mantra this year is experiment and fail quickly," one newspaper news executive volunteered. "Don't be afraid of change and don't stick with something too long if it doesn't work."

"Outside funding options are a bad idea overall," one broadcast news executive offered. "They are being used to 'save' old models of journalism that are no longer economically viable and will die out over time no matter what."

The survey found some significant differences in the attitudes between leaders of newspaper-based newsrooms and those of broadcast. Among them was their view of journalism's future. Broadcast news executives were strikingly more pessimistic, with those who see journalism headed in the wrong direction outnumbering those who think it is headed in the right direction by almost two-to-one. Leaders of newspaper newsrooms, by contrast, are split, with a slight tilt toward optimism.

These are some of the findings of the survey, conducted from December 2009 through January 2010, of members of the two major groups representing news executives from the newspaper industry and the broadcast industries, ASNE and RTDNA, conducted with the Project for Excellence in Journalism. In all, 353 news executives responded, representing 36% of those surveyed from ASNE and 24% from RTDNA.

Among the findings:

- Many of the new revenue options being debated today receive only limited or divided support from news executives. When it comes to the often-discussed option of pay walls for online content, for instance, only 10% say they are working on them, though that could change. Another 32% are considering them and just 11% have written off the idea. More than

a third (35%) have not even considered them at all. Still, as they look ahead, only 15% of news executives believe pay walls will be a significant source of revenue in three years.

- There is significant resistance, however, to other discussed revenue streams, particularly from the government or from groups that engage in advocacy. Fully 75% of news executives have serious reservations about receiving government subsidies, and 78% have significant resistance to financing from interest groups. Roughly half have significant worries about funds from government tax credits and more than a third have significant doubts about private donations.

- Most of the effort online is focused instead on more conventional revenue sources. Display and banner online advertising, for all that it has failed to grow, is still the No. 1 area of effort and the one that news executives pin their greatest hopes on. But second is revenue from products outside of news.

- Broadcast news executives are noticeably more pessimistic about journalism's future than editors at newspaper-based operations. Broadcasters think their profession is headed in the wrong direction by a margin of nearly two-to-one (64% versus 35%). By contrast, editors working at newspapers were split (49% wrong direction versus 51% right direction). A year ago, journalists who were members of the Online News Association surveyed by PEJ fell in between these two, 54% wrong direction, 45% right.

- And most news executives think the Internet is changing the fundamental values of journalism. Six out of ten feel this way—though executives from broadcast operations (62%) do so more than executives from newspapers (53%). And their biggest concern is loosening standards of accuracy and verification, much of it tied to the immediacy of the Web.

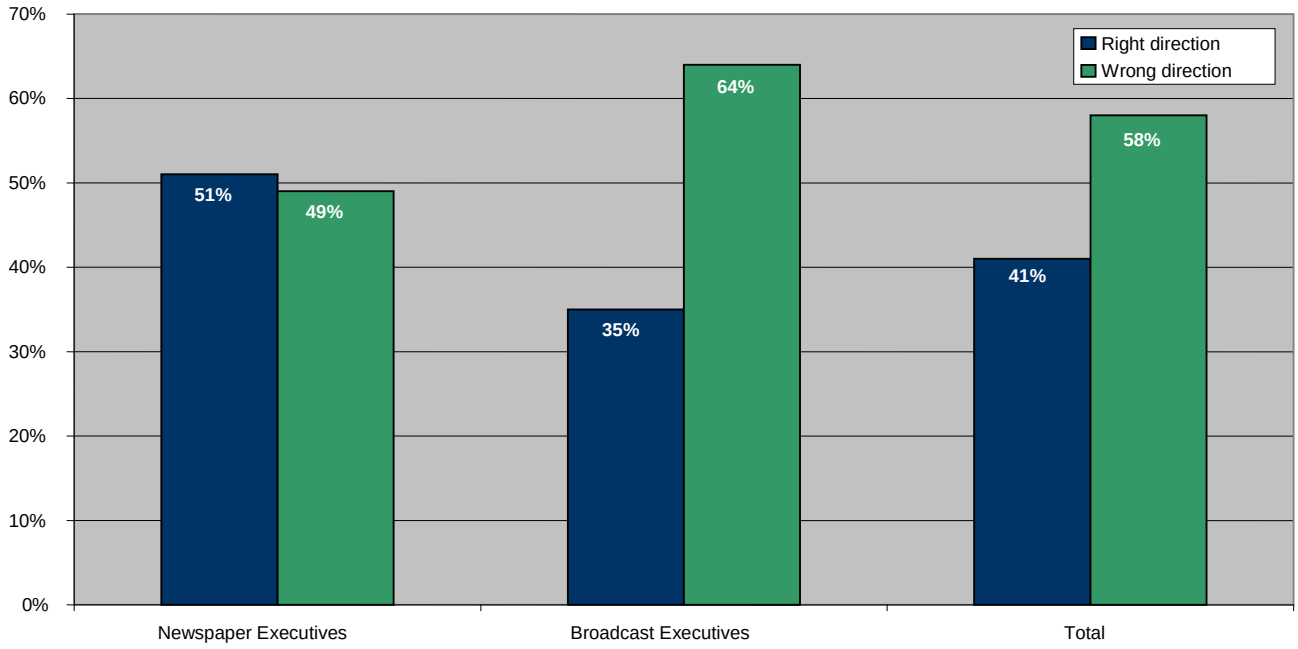
- Mobile applications are becoming increasingly important. Three-quarters say mobile applications are essential or very important while just 35% say that of YouTube postings or other video websites.

The State of Journalism

Overall, most news executives are worried about journalism's future. Nearly six in ten, 58%, believe the profession is headed in the "wrong direction," while 41% see things moving in the "right" one.

But there is a noticeable split here between newspaper executives and broadcast news executives. Members of ASNE, a newspaper-related organization, are narrowly more optimistic than pessimistic about journalism's direction; 51% see things getting better vs. 49% who see them getting worse.

Direction of Journalism Today



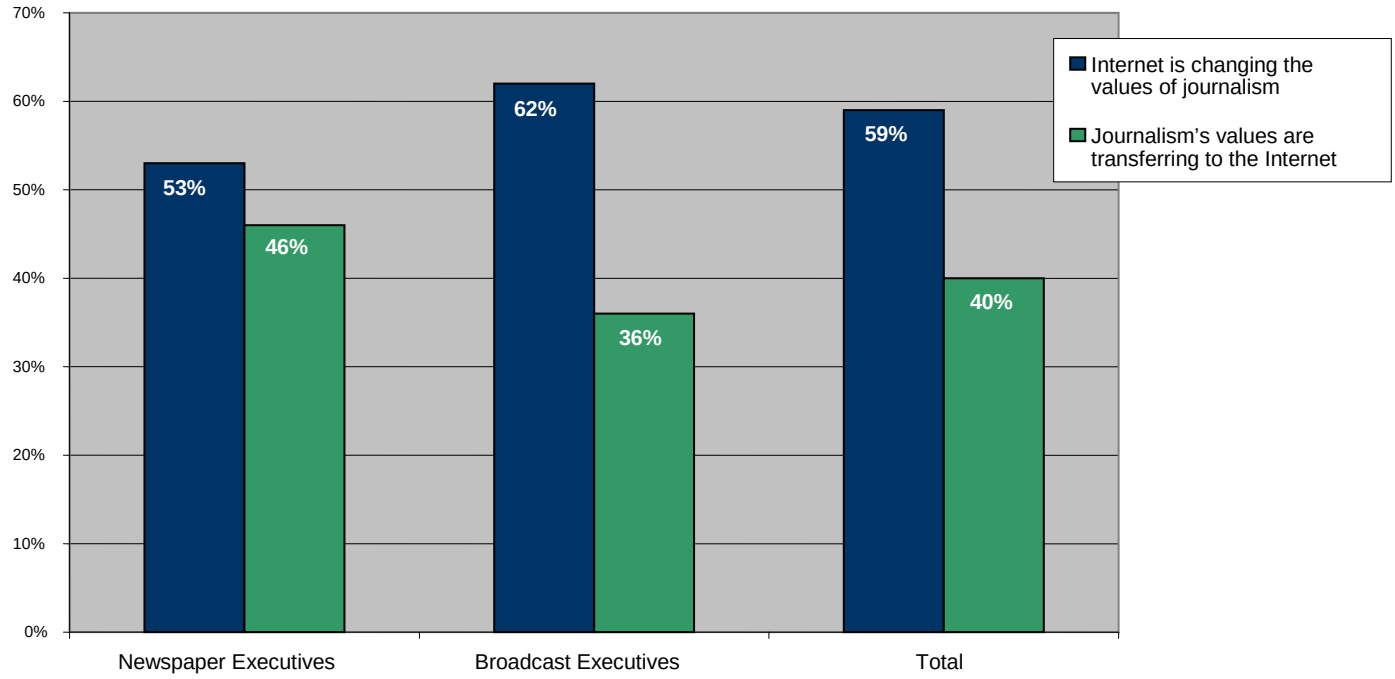
Question: "Thinking about journalism overall in the U.S. today, do you think it is generally going in the right direction or the wrong direction?"

Broadcast news executives who are members of RTDNA, by contrast, are strongly pessimistic. Only 35% of those who run TV or radio station newsrooms said the profession was headed in the right direction, while 64% thought it was going in the wrong direction.

Another broad area of inquiry asked about fundamental values of the news business. The majority of news executives believe that the Internet is altering basic journalistic ethics, and more often in ways they find worrisome. Fully 59% said they thought "the Internet is changing the fundamental values of journalism." Meanwhile, 40% said they thought those values are "transferring to the Internet."

Here again, however, we see a split between news executives working at newspapers and those from broadcast operations. Editors who came from newspaper organizations are less likely to think the Web is changing their values. Among this group, 53% think values are changing while 46% do not. Among broadcast news executives the number is 62% to 36%.

Is the Internet Changing Fundamental Values of Journalism?



Question: "Do you think that the Internet is changing the fundamental values of journalism or would you say that journalism's fundamental values are transferring to the Internet?"

Among those who see values changing, there is a broad consensus about the direction— and it is primarily negative. When asked to explain what they meant, majorities of both groups appeared most worried about loosening standards (62% of newspaper executives and 67% among broadcasters), and the bulk of these responses referred to a decline in accuracy, a lessening of fact-checking, and more unsourced reporting.

That was followed by, and closely linked to, an emphasis on speed, mostly in a negative light.

"I worry that journalistic standards are dropping in that blogging and celebrity gossip and Tweets are being confused with reporting and editing that passes a rigorous standard," wrote one broadcast executive.

A newspaper executive echoed that, offering, "There is too much emphasis, I believe, on getting information fast—even at the expense of accuracy, thoroughness and fairness."

One broadcast leader cited coverage of the Tiger Woods story as an example of "a culture in which we don't double check facts like we used to." The respondent added, "We (the media) reported he was seriously hurt, then not seriously hurt, then involved in a scuffle with his wife."

Another concern, volunteered by over 10% of respondents, was increased opinion and bias. "[The] Internet is replacing facts with conjecture," explained one broadcast news executive. "Opinion [is] being disguised as fact," echoed another.

Neither group of news executives, however, finds the growing role of citizens as significantly influencing the fundamentals of the industry. Just 5% of the news executives mentioned citizen engagement as a source of changing news values (with newspaper executives slightly higher at 7% and broadcast executives at 4%).

Nor is the loss of the press's exclusive role as gatekeeper of public knowledge at the forefront of change. Only 3% of newspaper executives and 1% of broadcasters volunteered greater access to news and information as an issue in changing standards.

How the Internet is Changing the Fundamental Values of Journalism

	ASNE	RTDNA	TOTAL
	%	%	%
Loosening standards	62	67	65
Emphasis on speed (good and bad)	32	29	30
More opinion or bias	15	16	16
Less analysis / More superficial	12	14	13
Emphasis on engagement/interactivity with audience	7	4	5
Willingness to let others have a voice	6	4	4
Less transparency/openness/accountability	3	5	4
More transparency/openness/accountability	1	3	2
Advertising/business is tainting journalism	1	1	1
Less original content / More content-based	1	1	1
Allows for greater access to news or information	3	1	1
Miscellaneous other	19	10	13
No answer	13	8	10
	[N=68]	[N=140]	[N=208]

Question: "If yes [the Internet is changing the fundamental values of journalism], in what way(s) is the Internet changing the fundamental values of journalism?"
Note: Open-ended question; total may exceed 100% due to multiple responses.

Executives have a complex and in some ways divided view of technology, seeing it as something that embodies risk and opportunity—the latter of which many feel they were slow to embrace. When we asked news executives to volunteer what they would do differently at their

organization in the last 10 years if they could do it over again, the most common response was a greater and earlier investment in new technology.

Some of the responses were blunt. The news industry, wrote one broadcaster, acted like the Internet was "likely a passing fad…"

"[We should have] recognize[d] that the Web was the biggest opportunity this industry has ever been handed," volunteered one ASNE member.

Many others expressed frustration that their organizations resisted investing in technology unless there was a clear promise of immediate financial return. "Invest in new media, despite lack of revenue return," one RTDNA member pleaded when asked what his operation might have done differently.

"There should have been strategic planning to develop a blueprint for the changes in technology and platforms," wrote another broadcast leader. "It should have included input from news-gathering staff so there would be a buy-in to a long-range plan."

The sense that companies were operating without strategic planning came through in various responses.

An executive from the newspaper side said the industry should have been "more innovative from a technology standpoint instead of letting everyone else pass us by."

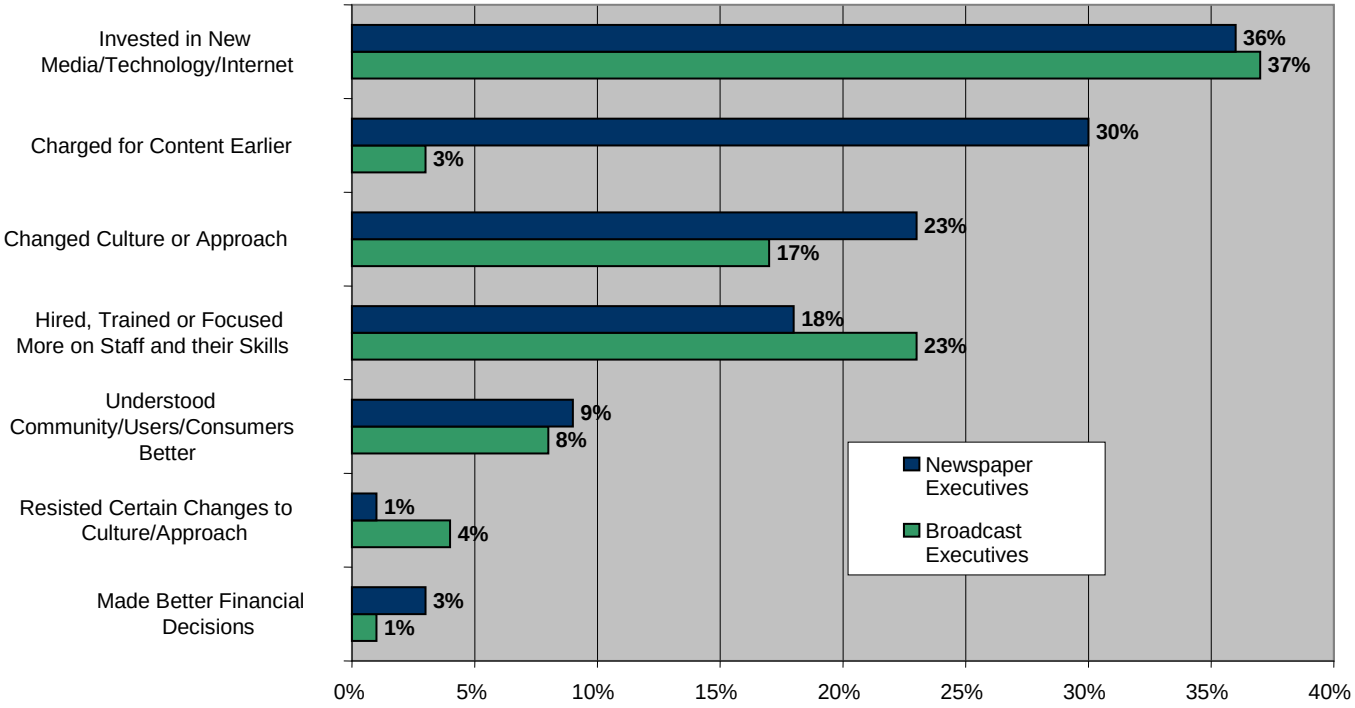
And some saw the slowness to adapt to new technology repeating itself all over again with mobile tools.

The next most common thing executives would do differently was hiring and training followed by changing their culture or approach.

"[I wish we had] hired more kids earlier in the game and trained them in the old values. Then turned them loose to use the new technology to help distribute the product," voiced a broadcast respondent. "I think we probably let the glitzy new tools distract us from the basic job of running a truly professional newsroom."

Among newspaper executives, though, there was a much stronger inclination to think that allowing content to be free was a major mistake. Fully 30% said they should have charged for content earlier, while only 3% of broadcasters did. Some of that difference may stem from the revenue structures of their legacy platforms. Broadcast stations, in their current form, derive no revenue from subscriptions, while newspapers today derive 20% or more from print circulation.

What News Organizations Could Have Done Differently



Question: "If you could do it over again, what one or two things could your news organization have done differently during the last 10 years to better prepare for the future?"
Note: Open-ended question; responses grouped; total may exceed 100% due to multiple responses.

To further probe how news companies might adapt in the future, the survey also asked news executives to rank various factors that had contributed to the current state of the industry. Here, the answers suggested both groups of news executives were more concerned with failures on the business side rather than the journalistic side. In short, news executives believe that missed opportunities to develop revenue have hurt more than any problems in attracting audiences or producing the news differently.

Newspaper executives put the most blame on their failure to develop new revenue streams and secondarily on not charging for online content in the first place. For broadcasters, the biggest problem, also financial, was demanding profit margins that were too high. That was followed by the failure to develop new revenue streams. But broadcasters were next most likely to cite the quality of their content as being insufficient. That was one of the factors newspaper executives were least likely to cite.

Both groups, though, clearly saw much of what happened as within their control. A mere 2% named technology itself as the dominant factor that had contributed to journalism's current challenges and 37% said it was not a factor at all—27% of ASNE respondents and 42% from RTDNA said it was not a factor.

Factors Leading to Journalism's Current Challenges

	The dominant factor	A major factor	One factor among many	Not a factor at all	No answer
	%	%	%	%	%
We should have charged for content online in the first place.					
ASNE:	27	32	25	16	0
RTDNA:	12	20	34	33	1
TOTAL:	17	24	31	27	1
We failed to develop new revenue streams.					
ASNE:	30	53	16	1	0
RTDNA:	18	48	29	4	*
TOTAL:	23	50	24	3	*
Profit margin demands were too high.					
ASNE:	16	45	33	5	2
RTDNA:	24	35	36	5	1
TOTAL:	21	38	35	5	1
We didn't use technology to develop new ways of story telling.					
ASNE:	8	38	42	12	0
RTDNA:	14	40	36	10	0
TOTAL:	12	40	38	10	0
Too many competitors were vying for people's time.					
ASNE:	3	35	52	8	2
RTDNA:	14	35	43	8	0
TOTAL:	10	35	46	8	1
Technology itself was the problem, not anything the industry did.					
ASNE:	4	16	50	27	2
RTDNA:	1	9	46	42	1
TOTAL:	2	12	48	37	1
The quality of our content should have been higher.					
ASNE:	3	27	50	19	1
RTDNA:	16	36	36	11	1
TOTAL:	11	33	41	14	1

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Question: "Here is a list of issues in journalism today. How big a factor do you think each has been in the industry's current problems?"

Considering the challenges facing the news industry now, one debate in journalism is whether traditional journalistic institutions brought some of the current problems on themselves by letting opportunities slip through their hands or whether these problems were inevitable. Could the news industry have moved more aggressively into areas where new competitors such as Monster.com, Realtor.com or even aggregators have moved in? Or was the fragmentation of the audience, the problems of advertising online and the loss of market share to new competitors going to occur no matter what?

News executives in this survey are clearly divided. When asked what is more to blame for journalism's problems—are they the inevitable result of technology or more a matter of missed opportunity—news executives are broken into three almost equal camps. A third see the problems as mostly a failure to adapt, about a third as inevitable and just over a third sensing a pretty even mix of the two.

Newspaper executives, though less pessimistic overall about the direction of journalism, were more likely to find fault with their own industry's failure to adapt (37% felt that way) than to think the industry's problems were "unavoidable" (29%). Among broadcasters, the split was much more even (30% versus 32% respectively), with the most, 57%, squarely in the middle.

The Matter of New Revenue

From a strictly numerical standpoint, traditional journalism's problems have more to do with revenue losses than with declining audience. In the last several years, for instance, the percentage declines in revenue for TV, radio and print have been close to double or in some cases even triple the rates of decline in audience. And something of a consensus is forming that for the news industry to survive, it must do more to innovate new revenue models, not just wait for conventional display and banner advertising to grow.

There is much discussion, but little gathered information, about the extent to which the industry is experimenting with new models, whether experiments have yielded any positive results, or whether current demands to cut operations leave time and energy for this kind of innovation.

The survey asked a battery of questions to try to get a more solid sense of what is happening. What we found is that, for now, the efforts at developing new revenue focus on fairly conventional options. That mix changes some as news executives look further out at where revenue might come from in the future. And there are significant differences in the way broadcast news executives see the future versus those who are working in newspaper-based news operations.

When it comes to what news organizations are currently doing to generate more revenue, most companies are still looking to their advertising departments. The No. 1 area of effort is "concentrating more on display and banner advertising." Fully 54% of news organizations listed this as one of the revenue streams they were pursuing "most actively."

To a significantly lesser degree, though still sizable, the No. 2 area news organizations are concentrating on for revenue is "**non-news products**." In all, 38% of news organizations ranked this as among their two most active areas for new revenue.

Search advertising, on the other hand, seems to have lost some of its steam. Over the last couple of years, networks like the Yahoo Initiative developed as ways to help news organizations capture the evolving local search market. But among executives surveyed here, it seems to now be less of a priority. In all, 26% listed building local search as a main area of activity, making it the No. 3 area of activity behind non-news revenue.

Close behind, and even more popular among print, was trying to **develop specialty or niche news products** that could be charged for. In all, 23% ranked fees from specialty niche sites as one of their most active revenue pursuits, with 30% of newspaper organizations and 17% of broadcasters listing that option.

Pay walls, the idea of charging people for content, at this point, appears to be more of an idea—and particularly among newspapers—than a reality. In all, only nine percent of executives named pay walls as one of their top two areas of development. Most of those responses came from newspaper executives, but even here, they were half as likely to name pay walls (15%) as to name non-news products or specialty niche products as their central revenue effort.

Still another option that has received some attention lately is the idea that news organizations might become more aggressive about **raising fees from aggregators**, something Rupert Murdoch has reportedly talked about with Microsoft, among others. The actual activity in this area appears to be quite small. Just 5% of news organizations list it as among their two main areas of activity. Just 3% of news organizations described this as a major part of their actions, and another 7% a "small" part.

We also probed this question of revenue experiments further, trying to get a more detailed sense of how important each one was to their news organizations. Was this revenue area a "major part" of their business efforts, a small part, something they are considering but not yet begun, or had they already considered but rejected it?

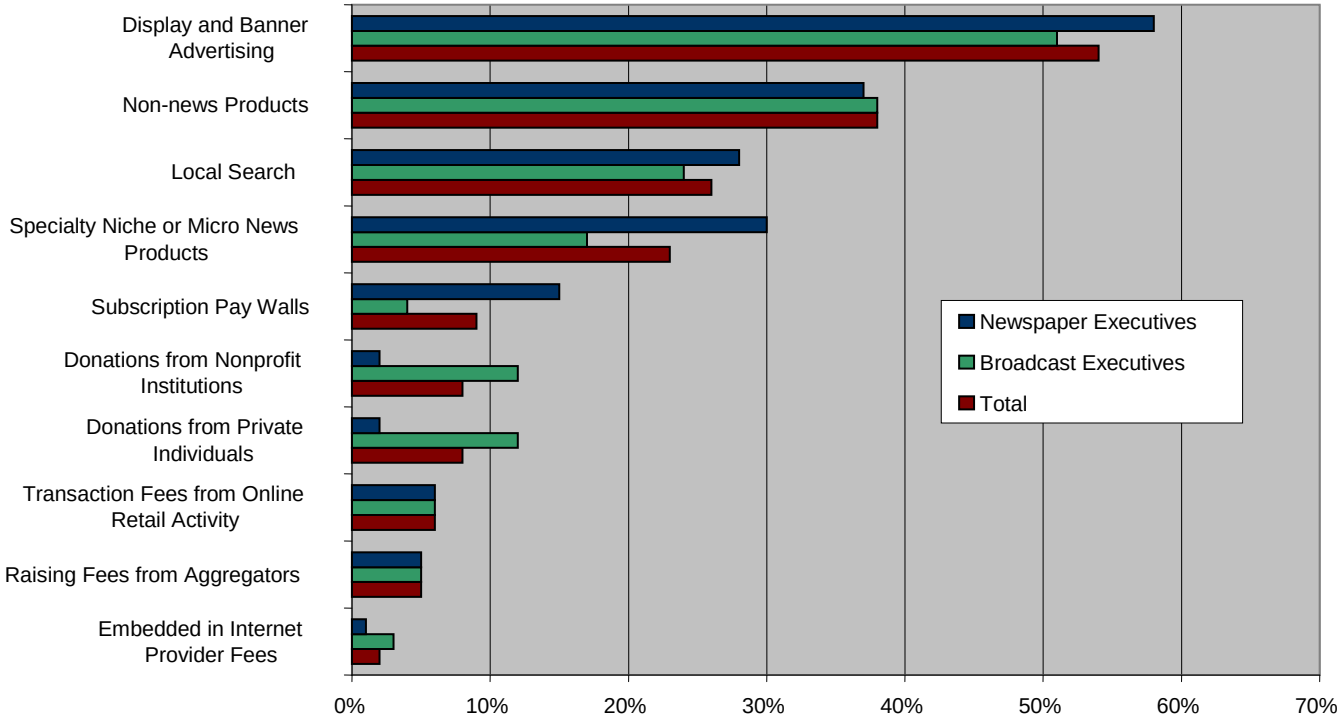
Here the rankings were similar, but the details were revealing. Concentrating more on conventional advertising came out on top, but it did not stand out quite as distinctly. Overall only slightly more than a third (37%) called concentrating on display and banner ads a "major" part of their effort, though the numbers were higher for ASNE members than RTDNA (47% vs. 31% respectively). The numbers were similar for those who said it was now a "small part of our effort."

Nearly a quarter of all news organizations (22%) ranked non-news revenue products as "major," and more than a third (38%) said they were acting on it in a "small way." Nearly everyone had at least thought about it.

On a national level, the most lucrative form of online advertising has proved to be search, though the market here is controlled largely by aggregators such as Google. But local search is still a

largely undeveloped market. How aggressively are news operations working on developing local search? Just a couple years ago, many were announcing partnerships with firms such as Yahoo and Google to develop things here. Now, that effort seems to offer less promise for many operations. Just 16% of news organizations described it as a major effort (14% newspapers and 17% broadcasters). Another quarter of news organizations (27%) said it was a "small" part of their effort, and here newspapers were more active (44% vs. 18% broadcasters). And 18% of news organizations said they were "considering" the option.

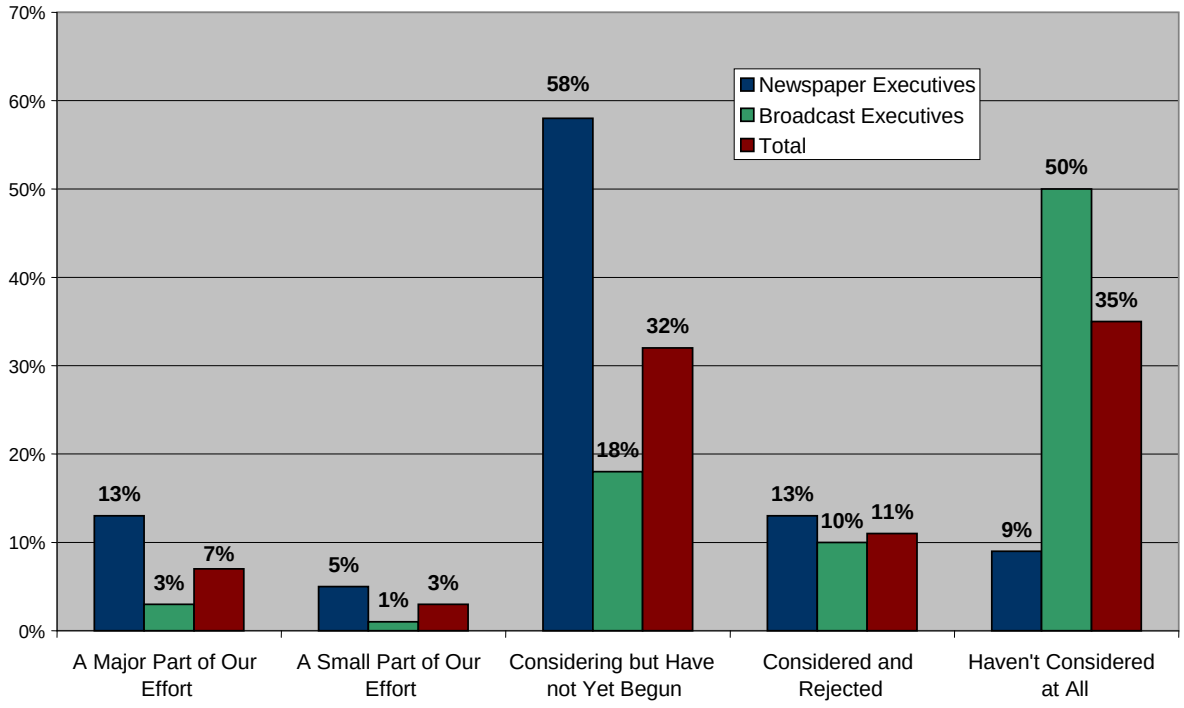
Revenue Models being Pursued Most Actively



Note: Question based on those who are trying two or more revenue models and asked "Of the revenue models you are trying, which two are your organization pursuing most actively?" Respondents were allowed up to two answers.

If most news operations are not yet pursuing pay walls, newspaper executives at least clearly have them on their minds. Fully 58% of these executives said their organizations are looking at the pay wall option, again far more than among broadcasters (18%). And most news organizations have not written off the prospect entirely. Only 11% of news executives across both groups said they had considered and rejected pay walls. That number suggests that the moves here, if they occur, will be cautious. It also means that those newspapers that move toward pay walls may face the more difficult prospect of being pioneers. Some economists have suggested that the prospects of any news organization succeeding with a pay wall is much more difficult if that organization is doing it alone, as opposed to the industry shifting that way en masse.

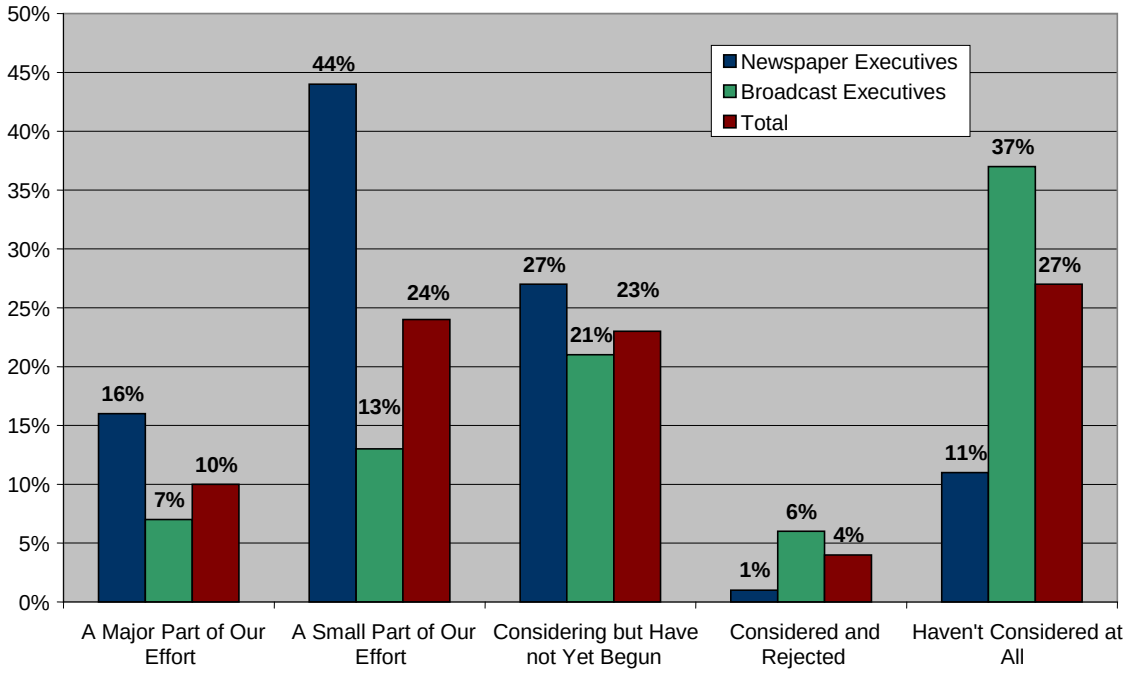
Level of Experimentation with Fees from Subscription Pay Walls



Question: "Here is a list of possible revenue streams people are talking about. Please tell us whether your organization is actively pursuing or considering each one."

Another kind of subscription—paid specialty or microsites—is getting more actual activity, but not by much. In all, just 10% of those surveyed said specialty pay sites were a major part of their news organization's efforts, though it was far more likely for newspapers (16%) than broadcasters (7%). Another quarter of news organizations (44% of newspapers and 13% of broadcasters) said specialty pay sites were a small part of their effort. And 23% of news organizations said they were now considering it (27% of newspapers and 21% of broadcasters).

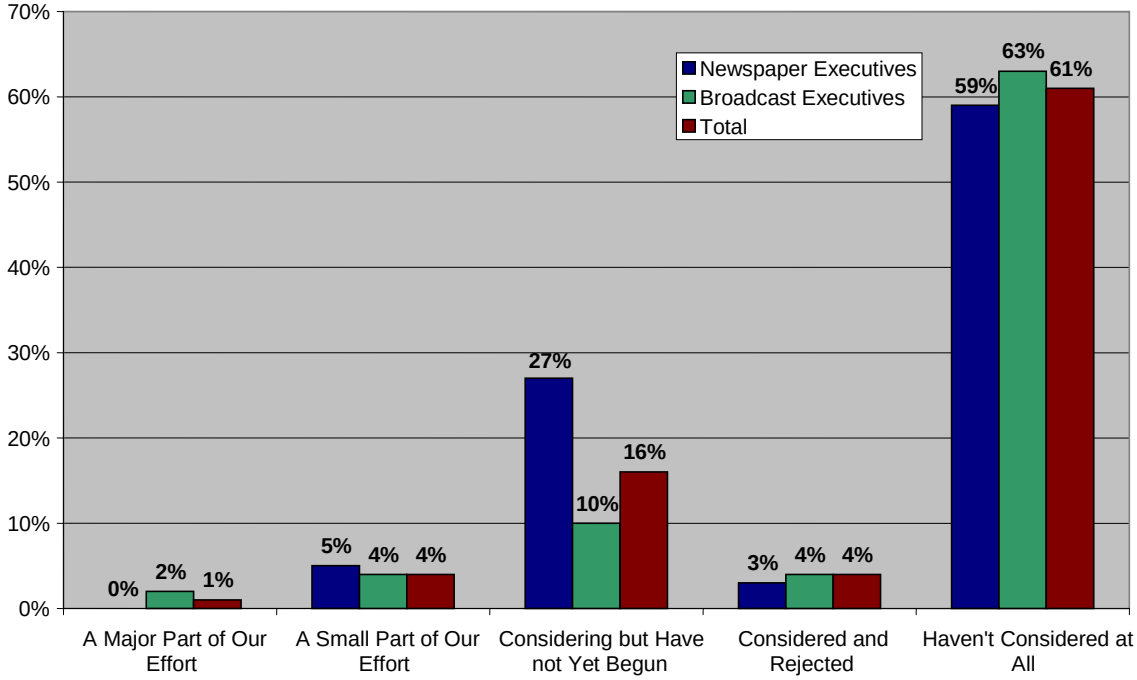
Level of Experimentation with Fees from Specialty, Niche or Micro News Products



Question: "Here is a list of possible revenue streams people are talking about. Please tell us whether your organization is actively pursuing or considering each one."

And what about one other idea—of embedding some kind of **fee** into what consumers already pay to **Internet service providers**? Only 2% of news organizations listed that as among their two main activities, and only 1% of news organizations (all of them broadcasters) called it a "major" effort. But it may grow. More than a quarter of newspapers said they were now considering this option.

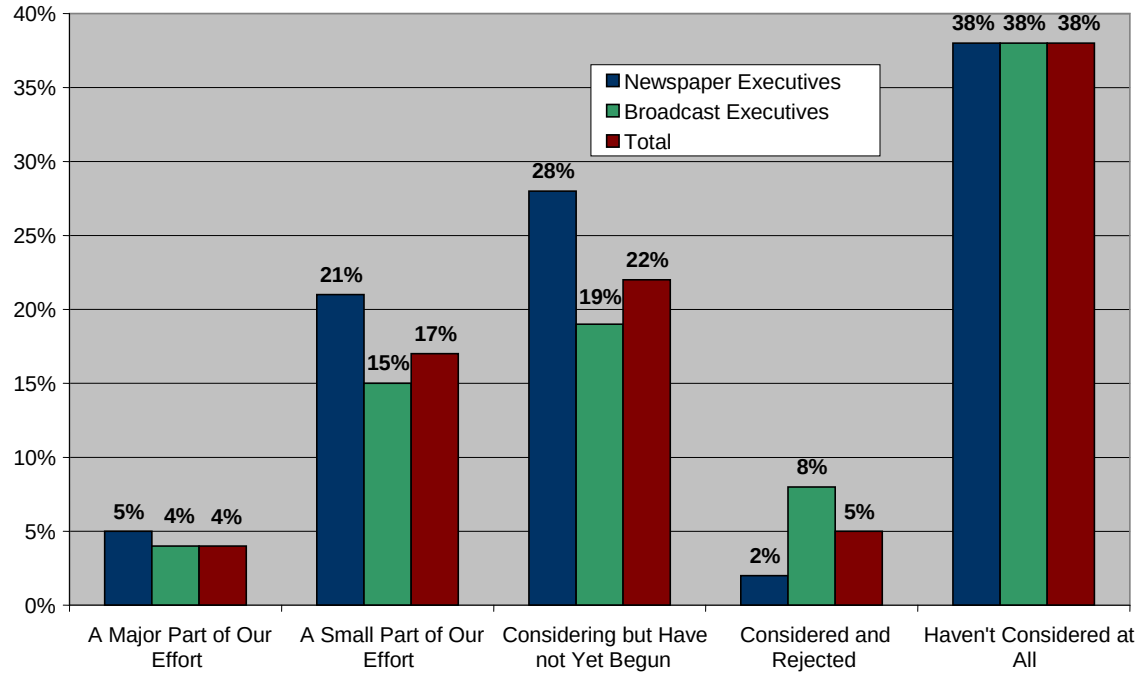
Level of Experimentation with Revenue Embedded in Fees People Pay to Their Internet Providers



Question: "Here is a list of possible revenue streams people are talking about. Please tell us whether your organization is actively pursuing or considering each one."

And still one other idea that has been around since the early days of the Internet may have some potential for growth—building retail activity into their websites from which they would derive "transaction fees." While just 6% listed it as among their two main activities (and 4% called it a "major" effort), 21% said they were doing it at some level, and 22% were looking at it. The numbers are higher for newspapers; fully 26% were doing it at some level and 28% were considering it.

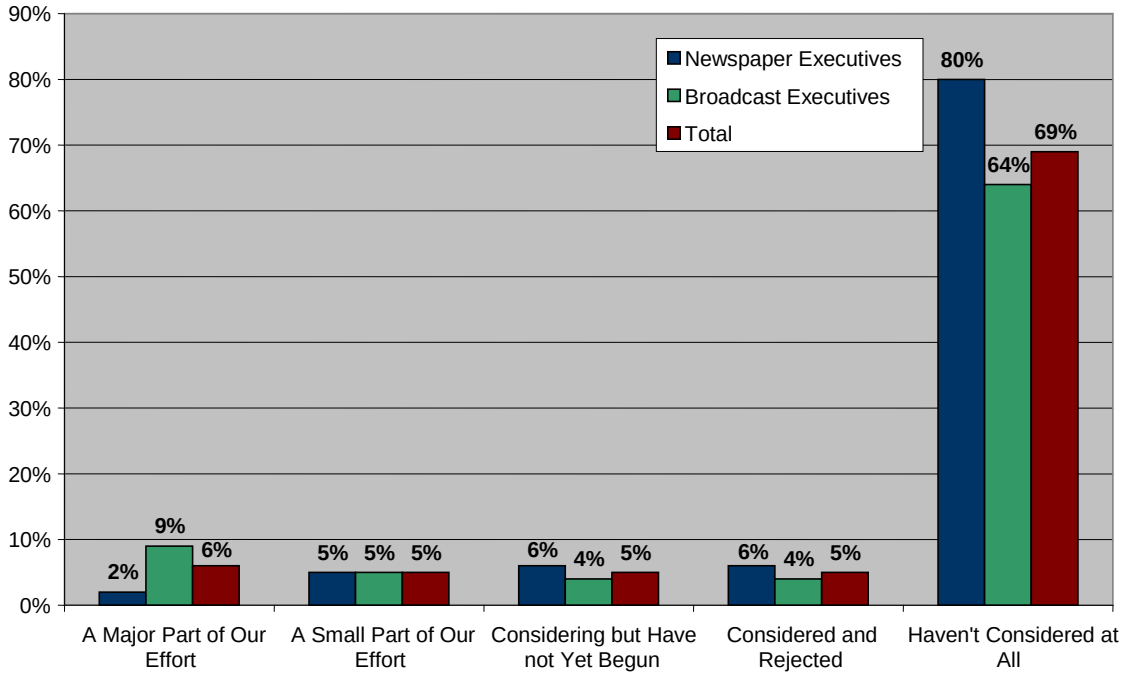
Level of Experimentation with Transaction Fees From Online Retail Activity



Question: "Here is a list of possible revenue streams people are talking about. Please tell us whether your organization is actively pursuing or considering each one."

But large majorities of news organizations appear to be uninterested at this point in the prospect of nonprofit contributions, something that is an option being considered by Congress and by state legislatures. Fully 69% of news organizations said they haven't considered that option (80% newspapers and 64% broadcasters).

Level of Experimentation with Donations from Nonprofit Institutions



Question: "Here is a list of possible revenue streams people are talking about. Please tell us whether your organization is actively pursuing or considering each one."

The survey then asked executives to look ahead further, beyond their current efforts, to what they thought would be the most important sources of revenue three years from now. Rather than foresee something substantially different, many of the current trends are expected to continue. Nearly 60% of respondents named some form of advertising as their primary revenue source in the future.

Newspaper executives still believe the answer will be display ads more than anything else, 31%, even though there are growing questions about the efficacy of this kind of advertising online. Another 17% pin the future on increasing their share of search ad revenue. But, nearly a quarter of newspaper executives now believe that in three years their most important source of online revenue will be subscriptions.

Most Important Revenue Source in Three Years

	ASNE %	RTDNA %	TOTAL %
Display ads	31	28	29
Video ads	4	31	21
Subscription fees	23	11	15
Revenue sharing from aggregators like Google	11	12	12
Search ads	17	3	8
User donations	2	7	5
Other	8	5	6
No answer	4	4	4

Question: "Thinking about online revenues, which do you think will be the most important source for your organization in 3 years? (Please select one.)

Broadcast executives put less hope in subscription revenue (just 11%) and instead think the biggest source will be video ads, 31%. That is followed closely by a good deal of hope in display ad growth, with 28% naming it first. Only 3% named search ads.

There was also a significant minority who sense that some kind of revenue relationship with aggregators will become the central form of revenue: 11% of newspapers executives and 12% of broadcast. But, only a small fraction of executives have high hopes for an option that relies on civic stewardship—user donations.

New Revenue and Ethics

As they look forward, news executives have concerns about some of the funding ideas being discussed for journalism. And these concerns are similar among newspaper and broadcast executives, thus marking fairly clear lines on what news executives deem acceptable.

The idea that draws the most concern is accepting money from interest groups that engage in advocacy of some kind. Nearly eight-in-ten surveyed (78%) had serious concerns about donations from groups of this sort. That can be a murkier line than it sounds. Some groups that fund advocacy can also fund groups that are educational. How much direct link can there be? If the organization is different but the funding source is the same, does that amount to interest group money? Such questions are harder to resolve.

There was a similar level of overarching concern about accepting government money. Fully 75% of all news executives surveyed—and 88% of newspaper executives—said they had "serious

reservations," or the highest level of concern, about direct subsidies from the government. And about half (46%) have that level of concern over tax credits for news organizations. There was somewhat less reservation over tax credits directed at news consumers, with 38% having serious reservations and 24% saying they are neutral. Still, even in these dire economic times, only 19% would welcome such funding.

There are bills in the Senate and House that would allow news organizations to accept individual nonprofit donations from private citizens, in the way that public radio and TV stations generate much of their revenue. News executives, however, seem to view this prospect as something of a slippery slope. Fully 39% have serious reservations about them, about half as many as with government subsidies, but another 31% have "some reservations." Only two-in-ten would welcome or be enthusiastic about such revenue. And, going back to what they are actually trying at the moment, fully 74% say their organizations haven't even begun to consider such an option.

How about nonprofit funding from foundations, which has become a key funding mechanism for many citizen and start-up online news ventures? Here the feelings are more divided. Only a quarter are seriously opposed, with another quarter (27%) expressing some reservations. But 31% would welcome these funds. Again, though, few organizations have done much to develop these options. Majorities (80% of ASNE and 64% of RTDNA respondents) say their organizations have not considered it at all.

News executives were often passionate in their reactions, both pro and con. "If the government becomes the 'money bags' for journalism, journalism will become the 'bag man' for the government," wrote a member of RTDNA. "This would be an assault to the first amendment of the constitution."

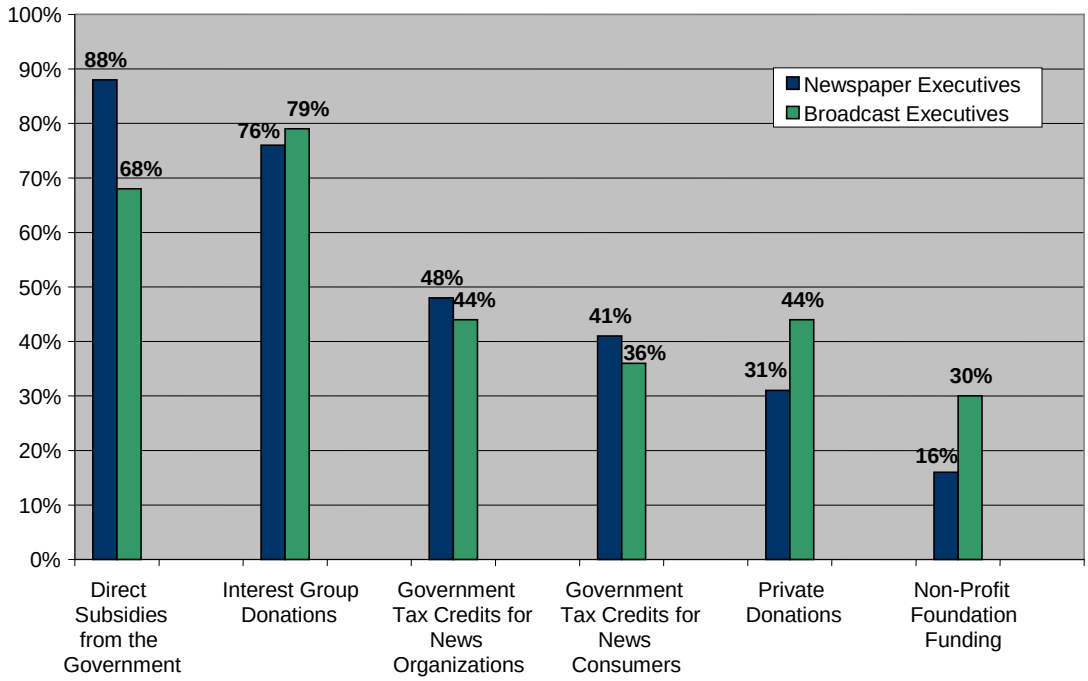
"We must keep our independence or perception of independence and accepting government subsidies ties you to the government we are meant to watch," explained an ASNE member, "The lines become too blurred if we begin taking donations and subsidies. Even if we remain aggressive in coverage why would readers believe we are independent?"

And another simply wrote, "Government involvement in any form is a terrible idea. Ultimately, we either need to provide what people want or we go out of business."

Said another, "None of these are acceptable choices. Want to raise revenue. Produce a QUALITY product."

Serious Reservations over Alternative Funding

% Who Expressed Serious Reservations



Question: "Here are some alternative options for funding journalism. For each, please tell us if you have any reservations or would welcome such funding." Those who responded "serious reservations" are represented in the chart above.

The idea that some of the new revenue ideas might cross ethical boundaries is not just theoretical matter, either. More than a third of news executives (36%) said their organization had already tried or discussed some revenue experiment that raised concerns about ethics or editorial independence at the organization. Most of these related to the relationship between advertisers and news.

The biggest area (cited by 38% of news organizations) related to ad sponsorship of specific content.

About a quarter (26%) also said they were concerned about blurring lines between advertising and news, something that would be less transparent to audiences than sponsorship. While hardly a majority, the specific examples were striking. Among them:

- "Paid product placement in news stories"
- "Much more pressure to 'interview' advertisers. Have started allowing news anchors to do paid live reads and endorsements."

- "Our sales staff has 'sold' some interviews to our online experts. They don't always offer great content, but a guest appearance is part of their sales package."

- "Sponsored segments."

- "The organization chart of our company places the news department under the sales director, not under a program director. The sales director developed an e-strategy that says it is important to have an internet presence but that we will only do things on the internet that can generate a profit or will be something a journalist wants to do that does not incur much expense. The news department is appalled."

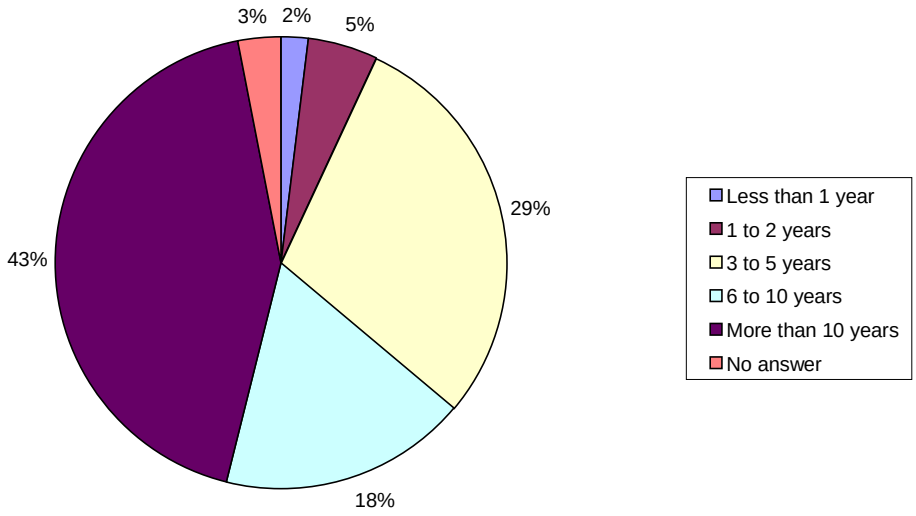
- "Blurring the lines between ads and editorial space in the paper."

How Long a Future Without New Revenue

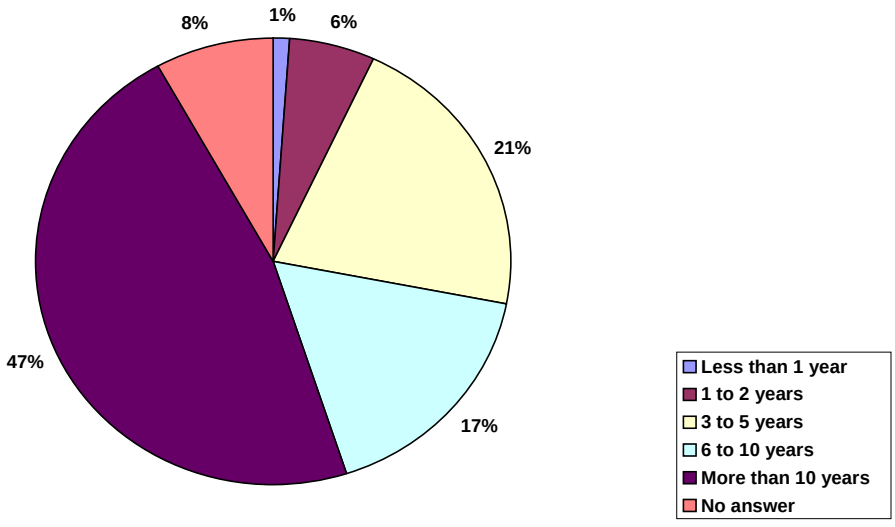
Without significant new revenue streams, how long would their news operations remain viable? In all, nearly a third (31%) said their news organizations are at risk in five years or less (7% in two years or less and 24% in three to five years). Another 17% put the number up to 10 years. But most, 46%, of those surveyed were confident that their organization would be around more than 10 years from now.

And is there any difference between those news operations with newspaper roots versus those with broadcast legacies? Not really. In that regard, the notion that somehow newspapers are in greater peril than television is not supported by the data, or at least not believed by the news executives who run the organizations.

How Long Do You Think Your News Organization Can Remain Solvent?
(Newspaper Executives)

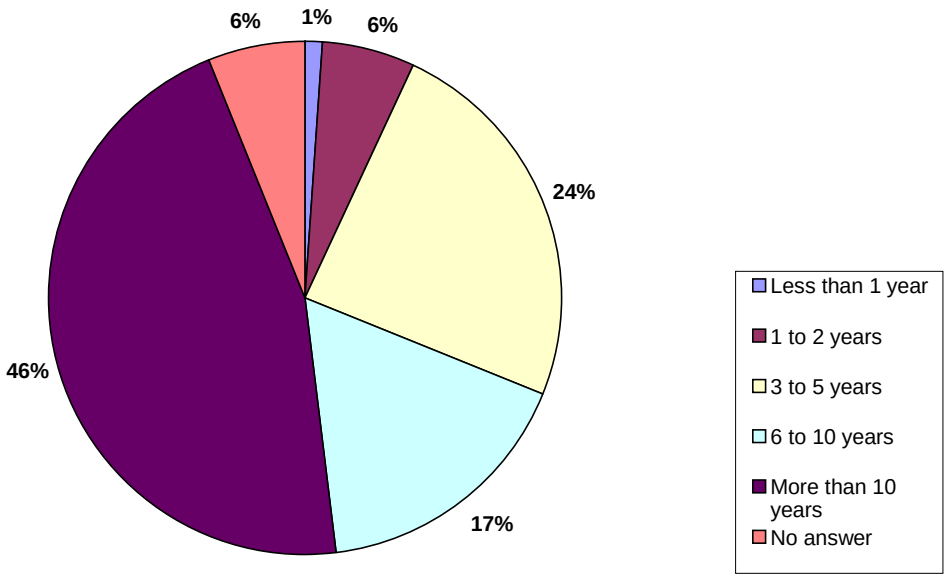


How Long Do You Think Your News Organization Can Remain Solvent?
(Broadcast Executives)



How Long Do You Think Your News Organization Can Remain Solvent?

(All Executives)

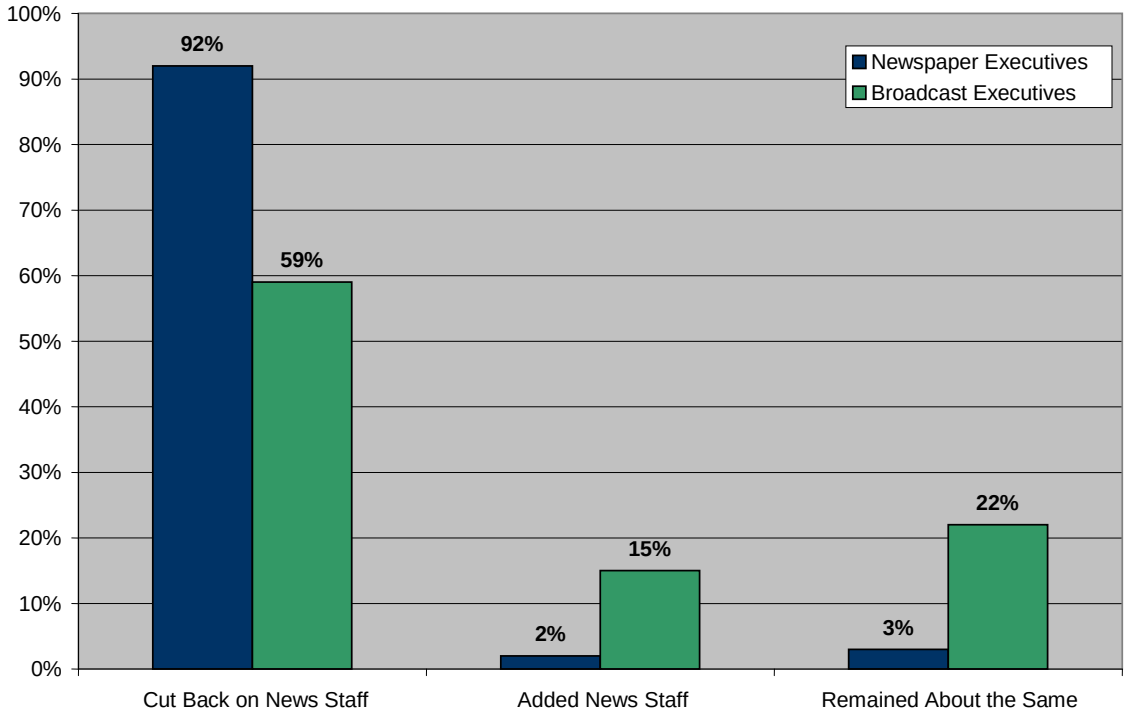


Question: "Without significant new funds, revenue streams or partnerships, how long do you think your news organization can remain solvent?"

For all that news executives do not tend to see their organizations' solvency at immediate risk, there is little doubt that most of these news operations are smaller. Fully seven out of ten of the news organizations surveyed said they had cut staff—often sizably.

Among newspaper organizations, more than nine out of ten (92%) said they had cut back on news staff in the last three years. Among broadcasters surveyed, the number was 59%. Only 10% of all respondents said that they added news staff in the past three years, and far more broadcasters (15%) said they added news staff, compared to only 2% of newspaper executives.

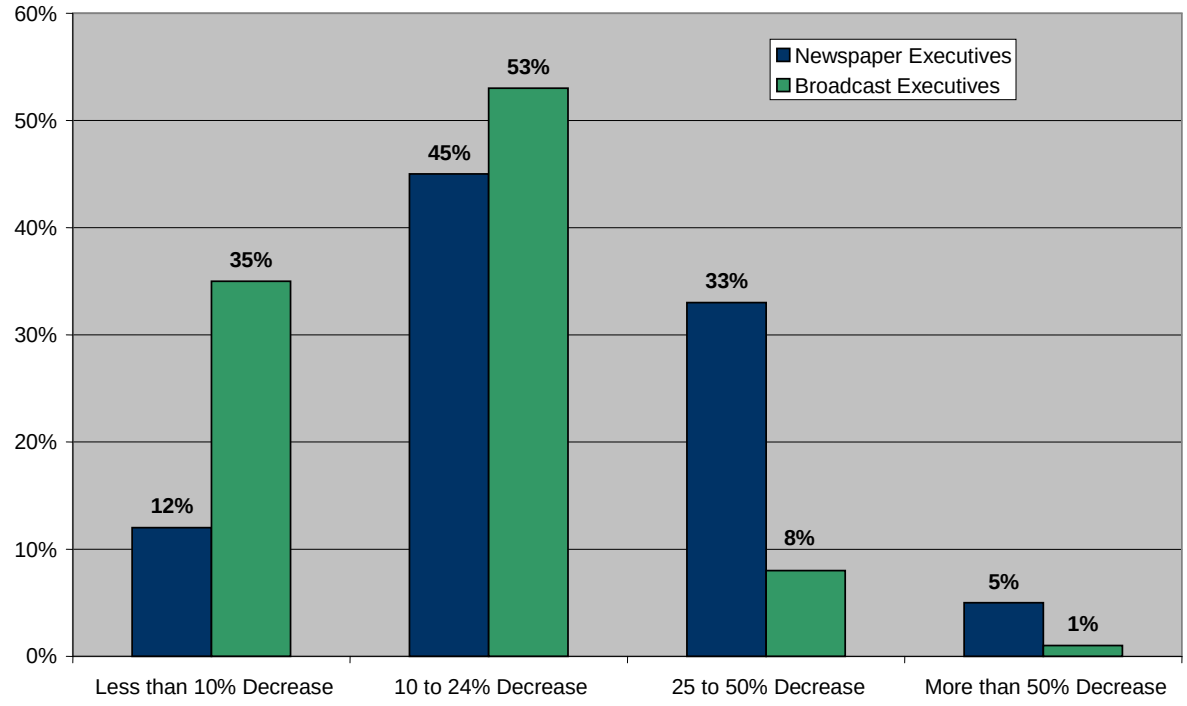
Staffing Changes in Last Three Years



Question: "In the last three years, has your organization cut back on its news staff, added news staff or has the news staff remained about the same?"

The cuts were deep, but especially at newspapers. A third of newspapers that had cutbacks (33%) said they saw declines of one-quarter to half of their staff. Most news organizations saw smaller, yet still significant, staff decreases; 45% of newspapers faced cuts of 10-24% and 53% of broadcasters saw the same.

Size of Staff Cutbacks

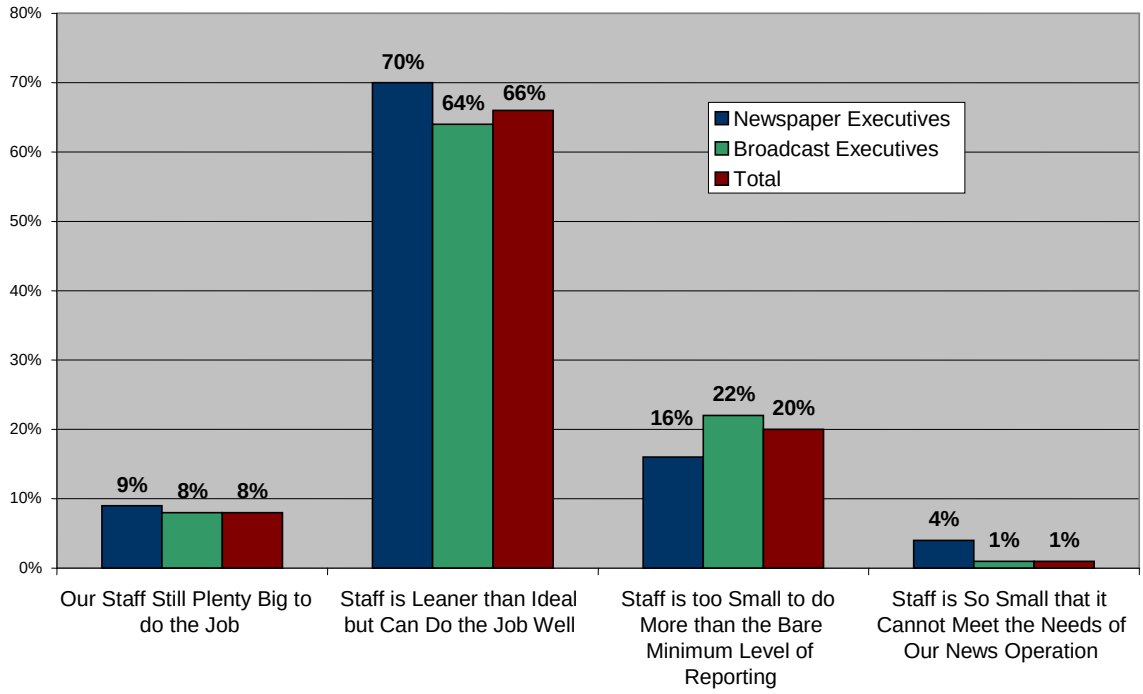


Question: "How large was the decrease in your news staff?" Based on those whose news organization had staff cutbacks.

But despite the cutbacks, there is a sense of determined optimism among news organizations. Two-thirds say that their staff is "leaner than ideal, but that they can still do the job well." Only 20% of news organizations said their staff is too small to do more than the bare minimum of reporting. And these views are consistent across broadcast and newspaper-based operations.

On the other hand, only 8% offered the most confident assessment, that "our staff is now plenty big to do the job." Any notion that news staffs had gotten bloated and the cutbacks now just take them to where they should be—that this cutting was just fat and not bone, as it were—is not widely shared.

Effects of Staff Cutbacks



Question: "Some people say their news staff had gotten larger than necessary and with cutbacks is still big enough to provide robust coverage. Others believe the cutbacks have materially hurt their ability to do their job. Thinking about your own organization, which of these statements comes closer to your view?"

The survey also tried to probe more deeply to identify the reasons for the optimism in newsrooms. What was different in their operations that was helping them do their jobs better than before? The findings here, particularly in newspaper-based newsrooms, had more to do with changing the culture of their newsrooms than with the adoption of new technology, though clearly the two subjects are related.

Overall, about a quarter of newspaper executives mentioned changes in staff structure and leadership as well as changes in newsroom culture as the most helpful new development in covering the news.

One dimension of the sense of changing culture that came through in many responses was a clearer sense of purpose or focus.

"Clarifying the mission," wrote one newspaper executive. "Clearer focus," wrote another. "Focus on priority topics," wrote a third. "We have been forced to focus like a laser on what we can do well and not worry about the rest," wrote still another.

This new focus took various forms. Some mentioned renewed emphasis on watchdog and enterprise work. Others described concentrating more on breaking news. And others mentioned engagement with the audience, both from user generated content and responding more to

consumers' comments. That suggests that with limited resources, people are striking out in different directions. It is not clear if all will succeed.

But there was a clear sense that the financial crisis facing legacy media had inspired creativity. That tone far outweighed the number of comments that seemed simply angry or downbeat.

"The decline in readership and revenue has removed any sense of complacency and much of the hubris. Some of the poor performers are gone. Pace of reporting and publication has quickened. We are more open to collaborating with our audience," wrote one newspaper executive.

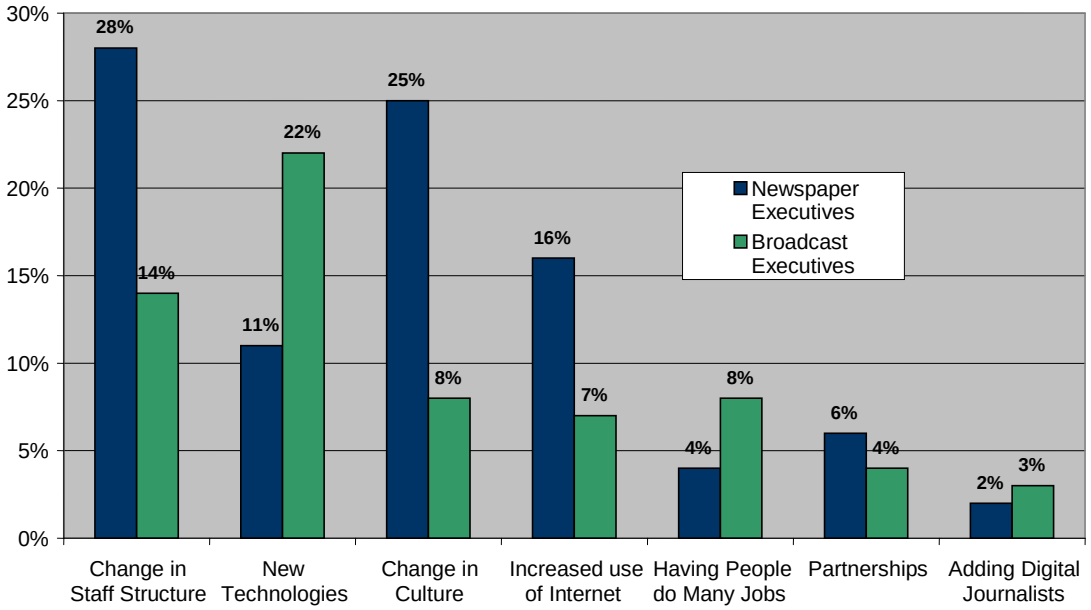
"The reduction in staff and subsequent reorganization FINALLY convinced everyone we are serious about a Web-first operation," wrote another newspaper news executive. "Our capacity for covering breaking news is stronger than ever. We fully integrated with our broadcast partners."

And executives spoke enthusiastically about new hires, younger people, versed in multimedia. Some wished they had moved faster to bring such people in.

Among broadcasters, the No. 1 change that people cited favorably was adopting new technology that did not involve the Internet. Many of these praised in particular the impact of so-called "one-person bands," in which a single person is equipped with the skills and equipment to report, shoot video, do live feeds and record audio—the correspondent, producer, camera and sound crew in one.

"The one-person-band outfits allow the survivors of the cutbacks (the best qualified remain behind) to gather news effectively and quickly," said one broadcaster. "Reporters who shoot and edit their own stories," said another. Wrote a third, these crews "give us more cameras and reporters on the street everyday."

What Change in Your Newsroom Has Helped Coverage?



Question: "What change in your newsroom, if any, has HELPED most your ability to cover the news well?"
Note: Open-ended question; all mentions were coded, so totals may exceed 100%.

Few found Internet resources helpful to covering the news. Only 16% of newspaper executives said that adoption or increased use of Internet resources were helpful in covering the news and only 7% of broadcasters agreed.

Even with this optimism, the shrinking newsroom is still having a toll on the quality of news. Overall, both newspaper editors and broadcasters agreed that staff cuts were the most detrimental to covering the news well, with 56% of newspaper editors and 31% of broadcasters saying that staff cuts hurt their ability to cover the news.

"We are expected to do more with less and that hurts morale," one broadcaster explained.

"Requiring me to basically do three jobs—producing, videography and editing when I was hired to do one—producing," offered another broadcaster when asked what if any changes made the job more difficult.

"I have one reporter per shift a day," said another, "I have one photographer on staff. He is our only live truck operator. Our company dropped the AP News Wire Service about the same time they cut the staff."

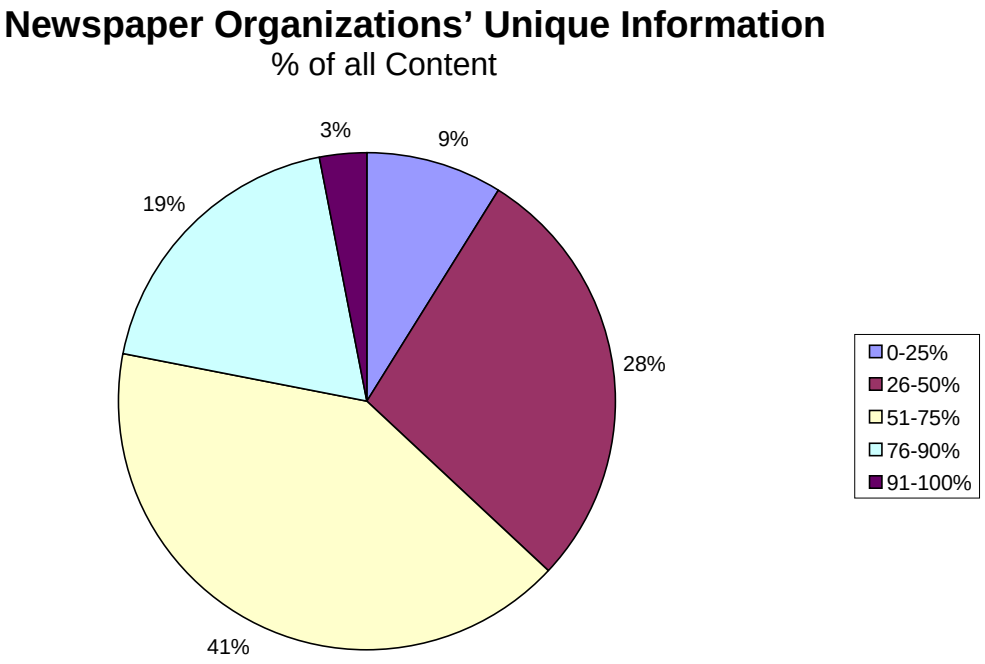
"Fewer reporters," said one newspaper executive; "cutting positions," wrote another; "too many cuts, too much talent leaving the business," wrote a third.

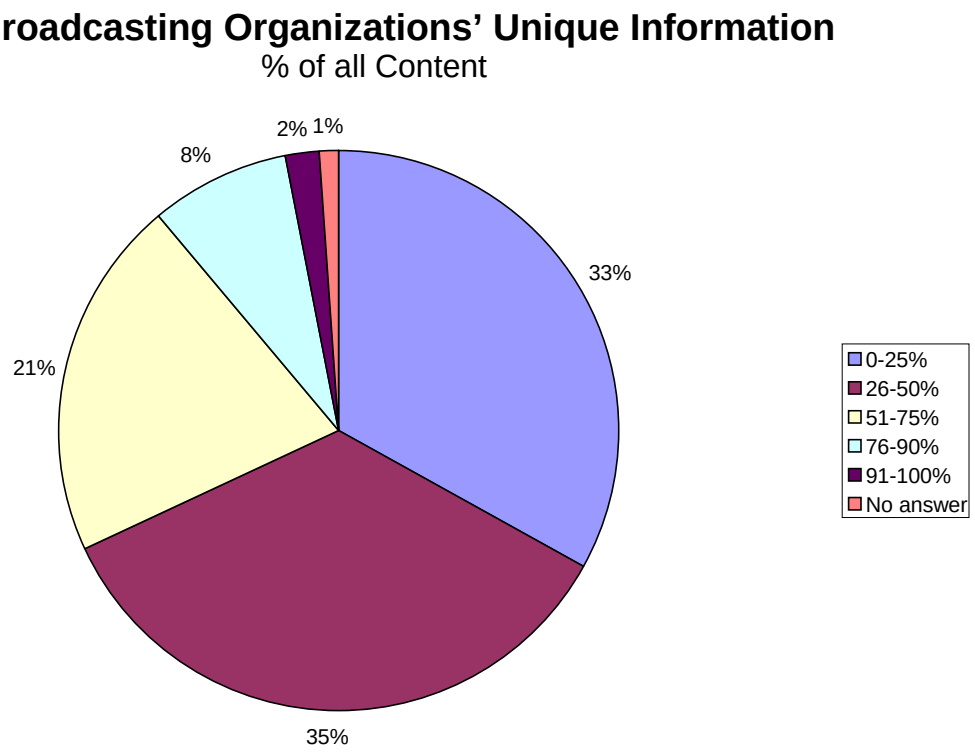
Far fewer felt that smaller budgets had a negative affect on news coverage. Only 14% of respondents said that budget cuts hurt their organization's ability to cover the news.

Content

What kinds of changes or adaptations have news organizations begun to make to the content as an online, 24-hour-a-day, seven-day-a-week product?

Most still rely most heavily on their original reporting. Fully 89% of news executives name it as the type of information most important to their brand. But, in the age of the Internet, even original reporting can often be duplicative. Two-thirds of broadcast executives acknowledge that less than half of their original content is unique information not yet reported by others, including one-in-three who say that is the case for less than a quarter of their original content. Among newspapers executives, four-in-ten say that 51-75% of their original content has information not yet reported on by others.

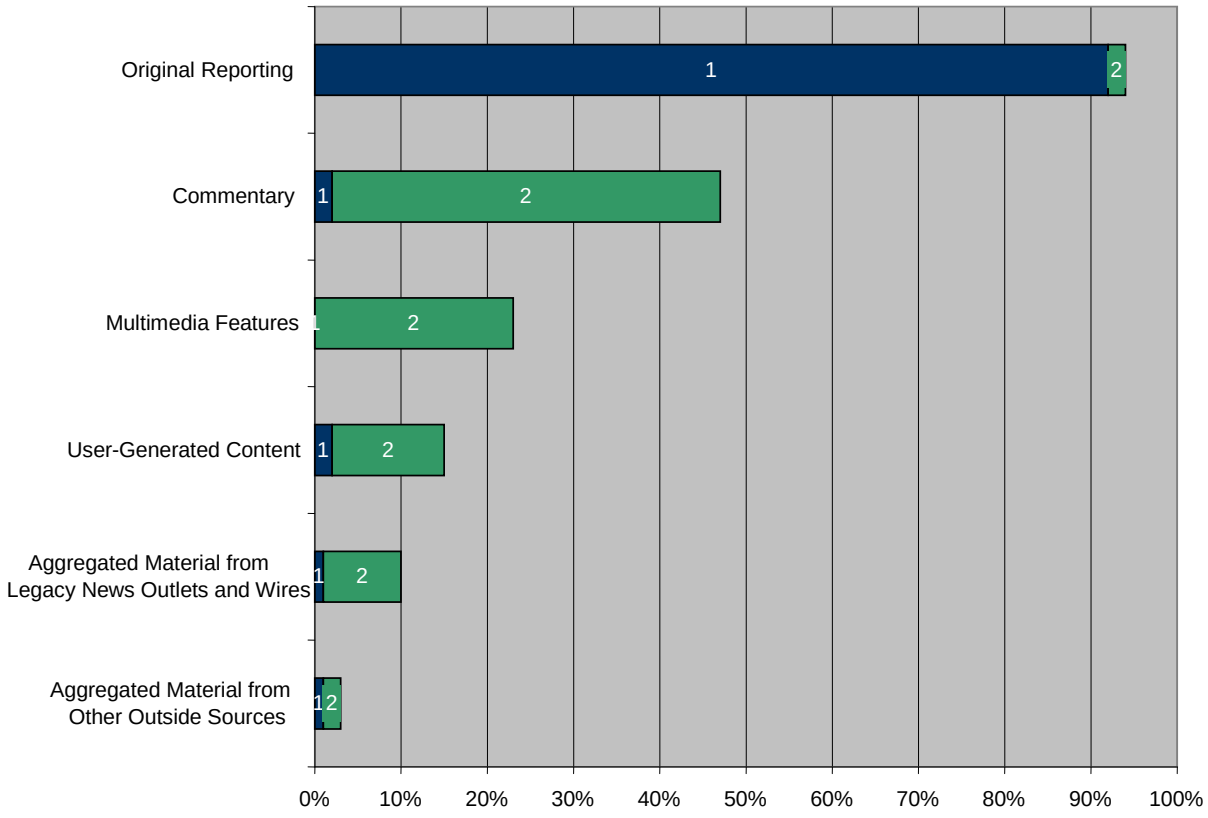




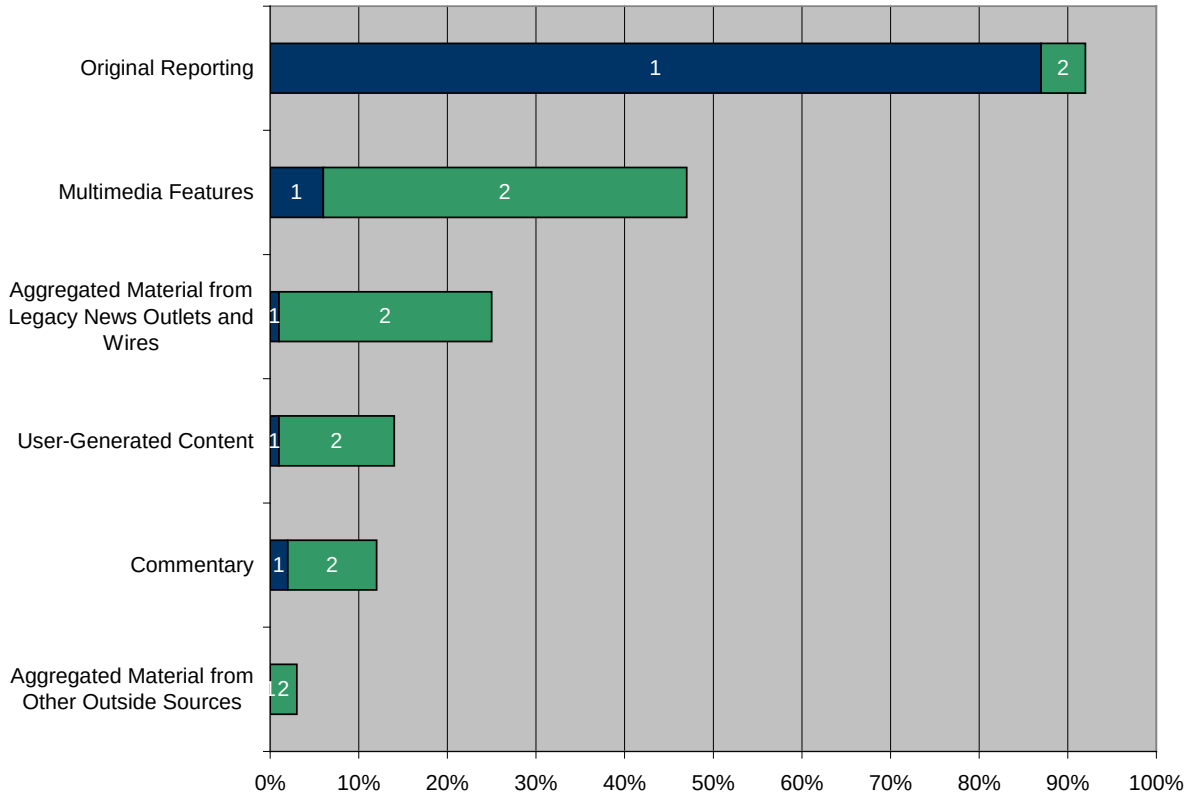
Question: "Thinking about the original content you now offer each day, what portion would you say is unique information not yet reported by others?"

The next most important element to the brands of these organizations differs somewhat by media sector and plays to the traits of each. For broadcasters, multimedia features were most likely to rank second (41%), followed by material aggregated from other legacy outlets or wires (24% ranked it second and 27% ranked it third). Print executives put higher value on original commentary offered (45% ranked it second), while most broadcast executives ranked it last among the items listed.

Most Important Types of Information for Newspaper Executives



Most Important Types of Information for Broadcast Executives



Question: "Please rank in order from 1 to 6 the importance to your brand of each type of information, where 1 represents the most important and 6 the least important. (Please use each number only once.)" These charts represent those who ranked the types of information as most important, one or two.

As a way of finding distinctive content to draw audiences, some organizations are becoming more specialized in the content they offer, especially those from a print background. Fully 76% of newspaper executives say their organization is moving in the direction of choosing to cover certain subject areas in depth and no longer covering others. This includes a quarter of them say they are moving strongly in that direction. Another 23% aren't moving that way at all.

Broadcast organizations are mostly split with half saying they are moving toward specialized content (16% strongly so) and the other half (48%) saying they have not taken such steps.

Another trend that has yet to become widely adopted among these organizations is the growing practice of including content produced by outside news organizations or journalist groups, other than wires. Among both groups, the biggest percentage (45% combined, 49% RTDNA, 37% ASNE) has not done this at all. But a third of newspaper executives say their outlets do this "on a regular basis." Fewer broadcasters (22%) report the regular practice. But majorities of both groups say that in general they are at least somewhat comfortable with the idea.

When organizations do run this type of content, they seem to keep control over what makes it into their brand. Nearly 60% of print executives fully edit these outside submissions, sometimes asking for additional reporting. Just 2% of all executives surveyed said they are contractually obliged to take that content verbatim.

Content Management/Display

We also asked about the way in which online content is managed and distributed.
The news organizations are experimenting with new modes of delivery and display, but overall the survey results suggest they remain fairly traditional in their approach to the Web. Even as consumers are increasingly following individual stories of their own—accessing stories through search and e-mail alerts, clicking directly to the story they want to read—home pages remain essential. Three-quarters of news executives listed homepages as essential—more than double most other options.

Executives listed mobile applications as the next most important element in news delivery, but to a much lesser degree (41% said it was essential). It was followed by e-mail alerts at 33%.

Social media—postings to social media sites—carries some importance as well for executives. Just less than a third (29%) said it was essential. Another 35% said it was very important. There were some differences by medium. About a quarter (23%) of newspaper executives and 32% of broadcasters call these posts to sites like Twitter and Facebook “essential.”

Still, that puts social media ahead of RSS (rated essential by 22%), widgets and other syndication (11%) or YouTube and other video sites (11%).

How Important News Executives Find Different Content Features

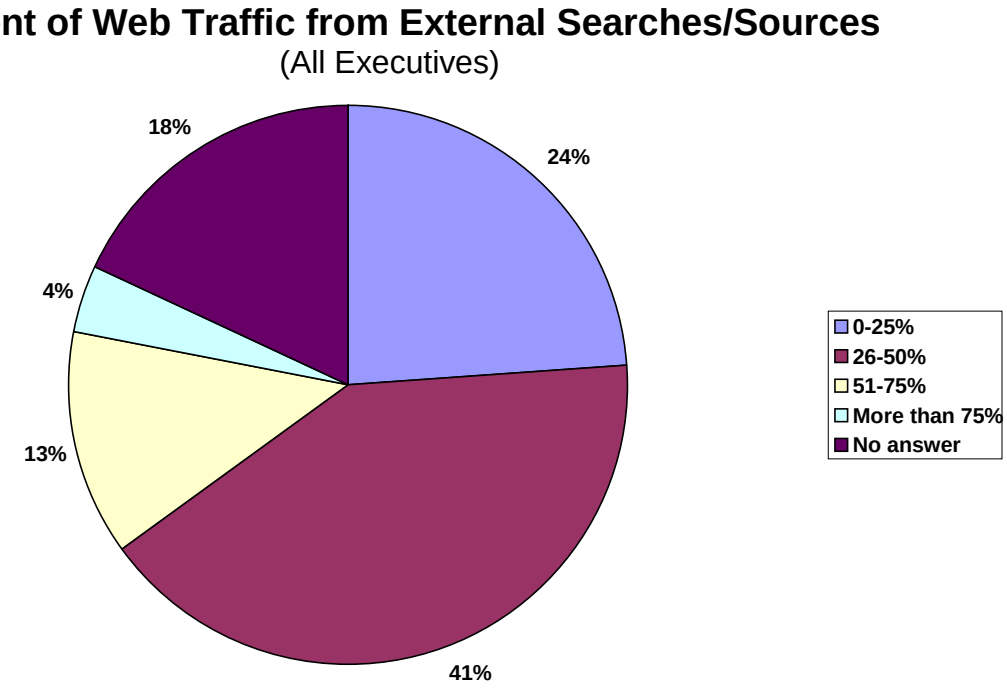
	Essential	Very important	Somewhat important	Not important	No answer
	%	%	%	%	%
Mobile applications or web features					
ASNE:	39	41	14	2	4
RTDNA:	41	29	17	5	7
TOTAL:	41	33	16	4	6
Home website					
ASNE:	77	18	1	1	4
RTDNA:	73	20	1	1	5
TOTAL:	74	19	1	1	5
Email alerts					
ASNE:	27	45	24	2	3
RTDNA:	36	32	20	7	6
TOTAL:	33	36	21	5	5
Postings on YouTube or other video sites					
ASNE:	6	27	48	15	4
RTDNA:	13	23	35	21	8
TOTAL:	11	24	40	19	7
Postings to social media sites like Twitter or Facebook					
ASNE:	23	39	31	3	3
RTDNA:	32	33	25	4	5
TOTAL:	29	35	27	4	5
RSS					
ASNE:	25	40	27	4	4
RTDNA:	21	28	32	9	10
TOTAL:	22	33	30	7	8
Widgets or other forms of outside syndication					
ASNE:	12	27	44	13	5
RTDNA:	11	26	37	17	9
TOTAL:	11	27	39	15	8
Listings on user-driven news networks like Digg or Propell					
ASNE:	6	18	54	18	4
RTDNA:	4	18	38	29	11
TOTAL:	5	18	44	25	8

PROJECT FOR EXCELLENCE IN JOURNALISM

Question: "When it comes to displaying or delivering your site's content to users, how important is each of the following?"

A good deal of where news organizations are putting their emphasis depends on what they know about their audiences and where their traffic comes from.

For these news operations, which are heavily local, the results appear to be somewhat different than for some of the better known national news websites. While outside searches draw some users, it does not make up the majority of Web traffic to news sites, according to the news executives surveyed. Most responded that half or less of their website traffic came from outside searches or external sources. Almost half (48%) of newspaper executives said that a quarter to a half of their website traffic came from outside searches, and 37% of broadcasters said the same. A quarter (24%) of all respondents said that less than a quarter of their website traffic came from external sources.



Question: “What percentage of your website traffic comes from outside searches or external sources?”

Methodology

This report is based on responses from 353 journalism executives on the membership lists of the Radio Television Digital News Association (RTDNA) and the American Society of News Editors (ASNE). The survey was administered online in English by Princeton Survey Research Associates International (PSRAI). The surveys were completed from December 2, 2009 through January 30, 2010.

Requests for participation were sent via e-mail to all active newsroom executives on the membership lists – for a total of 1,298 individuals – with a link to a Web site where the survey was hosted by PSRAI. Each respondent had a unique identification code with which he or she could log in to the survey.

Definition of Population Universe and Contact Procedures

The universe of potential respondents was defined as journalists who are members of either the Radio Television Digital News Association (RTDNA) or the American Society of News Editors (ASNE). An individual news organization can and does have more than one RTDNA or ASNE member on staff. The invitations were sent to the individual members and not to the organizations. The two groups represent news organizations accounting for a majority of newspaper circulation and broadcast news audience in the U.S. All active executives on the lists were invited to participate.

RTDNA and ASNE members were first e-mailed on December 2, 2009, explaining the study and requesting their participation. E-mails included a link to the online survey as well as a unique password to gain entry into the web instrument. Follow-up e-mails were sent on December 10, 2009 and January 7, 2010 to those who did not already complete the survey or did not refuse to participate. Several weeks into the field period, RTDNA and ASNE staff also personally contacted non-responders from their respective membership lists as a final effort to encourage participation in the study.

Response Rates

A total of 353 members among the 1,298 potential respondents from the combined membership lists completed the survey, or 27 percent. Here is how the raw response rate varied by membership organization.

% Response by Organization

Member Organization	Total Contacted	Completed	Response Rate
RTDNA	943	225	24%
ASNE	355	128	36%
Total	1,298	353	27%

Margin of Error[1]

As a sample of the population of editors and executives of the two organizations, the survey is subject to sampling error. The following table shows the error attributable to sampling that would be expected at the 95% level of confidence for the total sample and the two groups separately:

Group	Total contacted	Sample Size	Plus or minus…
Total sample	1,298	353	5 percentage points
RTDNA	943	225	6 percentage points
ASNE	355	128	7 percentage points

In addition to sampling error, one should bear in mind that question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of opinion polls.

[1] This methodology statement was updated on May 18, 2010, after query from an outside publication led the Pew Research Center, Princeton Survey Research Associates International and the Project for Excellence in Journalism to review the sample in this survey and determine that it was more robust than originally described.

Princeton Survey Research Associates International
for
Project for Excellence in Journalism

Online Economic Survey of Journalism Executives

FINAL TOPLINE
02.11.10

N = 353 journalism executives from the ASNE or RTDNA membership lists
[N=128 ASNE journalism executives]
[N=225 RTDNA journalism executives]
Interviewing Dates: December 2, 2009 – January 30, 2010
Job#: 29089

NOTE: Due to rounding, percentages may not add to 100%. An asterisk (*) indicates values less than 0.5%.

GATEWAY PAGE

Welcome! Thank you for participating in the survey of journalism executives being conducted jointly by the American Society of News Editors (ASNE), the Radio Television Digital News Association (RTDNA) and the Pew Research Center's Project for Excellence in Journalism (PEJ). We very much appreciate your help.

The survey should take about 15 minutes for most people to complete. Your answers will be kept completely confidential and used only in the aggregate.

Please enter your User Name to participate in the survey:
User Name: _____

If you have any questions, please call XXXXX XXXXXX at 1-XXX-XXX-XXXX or send e-mail to XXXXXXX@journalism.org.

INTRODUCTION PAGE (AFTER LOGGING IN)

We would like for you to answer each question, but if you do not want to answer a given question, just skip it and move on to the next question. Once you have moved to a new question, you will not be able to change your answers to previous questions. Do not use the back button on your browser.

Unless you give us express permission otherwise, we will keep individual responses to the survey confidential, as we have done in all previous surveys of journalists. We will not give copies of your responses to your organization.

PEJ is a non-partisan (and nonprofit) research organization and part of the Pew Research Center. You can see our work at http://www.journalism.org/.

Q1. Thinking about journalism overall in the U.S. today, do you think it is generally going in the right direction or the wrong direction?

	TOTAL	ASNE	RTDNA	
%	41	51	35	Right direction
	58	49	64	Wrong direction
	1	0	1	No answer[2]

Q2. Do you think that the Internet is changing the fundamental values of journalism or would you say that journalism's fundamental values are transferring to the Internet?

	TOTAL	ASNE	RTDNA	
%	59	53	62	Internet is changing the fundamental values of journalism
	40	46	36	Journalism's fundamental values are transferring to the Internet
	1	1	1	No answer

[2] Respondents were given the opportunity to skip over questions during the web survey. The "No answer" results reflect those who did not answer a given question.

Q2a. If yes, in what way(s) is the Internet changing the fundamental values of journalism? [OPEN-END]

Based on those who say the internet is changing fundamental values of journalism

	TOTAL	ASNE	RTDNA	
%	65	62	67	Loosening standards
	30	32	29	Emphasis on speed (good and bad)
	16	15	16	More opinion or bias
	13	12	14	Less analysis / More superficial
	5	7	4	Emphasis on engagement/interactivity with audience
	4	6	4	Willingness to let others have a voice
	4	3	5	Less transparency/openness/accountability
	2	1	3	More transparency/openness/accountability
	1	1	1	Advertising/business is tainting journalism
	1	1	1	Less original content / More content-based
	1	3	1	Allows for greater access to news or information
	13	19	10	Miscellaneous other
	10	13	8	No answer
	[N=208]	[N=68]	[N=140]	

Note: Total may exceed 100% due to multiple responses.

Q3. On a scale of 1 to 5, which comes closer to your view of journalism's problems today?

	TOTAL	ASNE	RTDNA	
%	12	13	11	1 - The news industry brought these problems on itself by failing to adapt.
	21	24	19	2
	36	33	38	3
	24	23	24	4
	7	6	8	5 - The problems are the unavoidable result of disruptive changes in technology.
	1	1	*	No answer

Q4. If you could do it over again, what one or two things could your news organization have done differently during the last 10 years to better prepare for the future? [OPEN-END]

	TOTAL	ASNE	RTDNA	
%	37	36	37	Invested in new media/technology/internet
	21	18	23	Hired, trained or focused more on staff and their skills
	20	23	17	Changed culture or approach
	13	30	3	Charged for content earlier
	8	9	8	Understood community/users/consumers better
	3	1	4	Resisted certain changes to culture/approach
	2	3	1	Made better financial decisions
	3	1	4	Not much/Nothing
	6	9	4	Miscellaneous other
	20	13	23	No answer

Note: Total may exceed 100% due to multiple responses.

Q5. Here is a list of issues in journalism today. How big a factor do you think each has been in the industry's current problems?

[RANDOMIZE ITEMS]	THE DOMINANT FACTOR	A MAJOR FACTOR	ONE FACTOR AMONG MANY	NOT A FACTOR AT ALL	NO ANSWER
	%	%	%	%	%
a. We should have charged for content online in the first place.					
TOTAL:	17	24	31	27	1
ASNE:	27	32	25	16	0
RTDNA:	12	20	34	33	1
b. We failed to develop new revenue streams.					
TOTAL:	23	50	24	3	*
ASNE:	30	53	16	1	0
RTDNA:	18	48	29	4	*

Q5 continued…

Q5 continued…

Q5. Here is a list of issues in journalism today. How big a factor do you think each has been in the industry's current problems?

[RANDOMIZE ITEMS]	THE DOMINANT FACTOR	A MAJOR FACTOR	ONE FACTOR AMONG MANY	NOT A FACTOR AT ALL	NO ANSWER
	%	%	%	%	%
c. Profit margin demands were too high.					
TOTAL:	21	38	35	5	1
ASNE:	16	45	33	5	2
RTDNA:	24	35	36	5	1
d. We didn't use technology to develop new ways of story telling.					
TOTAL:	12	40	38	10	0
ASNE:	8	38	42	12	0
RTDNA:	14	40	36	10	0
e. Too many competitors were vying for people's time.					
TOTAL:	10	35	46	8	1
ASNE:	3	35	52	8	2
RTDNA:	14	35	43	8	0
f. Technology itself was the problem, not anything the industry did.					
TOTAL:	2	12	48	37	1
ASNE:	4	16	50	27	2
RTDNA:	1	9	46	42	1
g. The quality of our content should have been higher.					
TOTAL:	11	33	41	14	1
ASNE:	3	27	50	19	1
RTDNA:	16	36	36	11	1

Now we want to ask about the economics of your news organization…

Q6. Here is a list of possible revenue streams people are talking about. Please tell us whether your organization is actively pursuing or considering each one.

[RANDOMIZE ITEMS; ITEM K ALWAYS LAST]	A MAJOR PART OF OUR EFFORT	A SMALL PART OF OUR EFFORT	CONSIDERING BUT HAVE NOT YET BEGUN	CONSIDERED AND REJECTED	HAVEN'T CONSIDERED AT ALL	NO ANSWER
	%	%	%	%	%	%
a. Fees from subscription pay walls						
TOTAL:	7	3	32	11	35	12
ASNE:	13	5	58	13	9	3
RTDNA:	3	1	18	10	50	17
b. Donations from private individuals						
TOTAL:	6	2	4	5	74	9
ASNE:	2	2	5	8	82	2
RTDNA:	9	3	3	4	69	13
c. Donations from non profit institutions						
TOTAL:	6	5	5	5	69	9
ASNE:	2	5	6	6	80	2
RTDNA:	9	5	4	4	64	14
d. Fees from specialty niche or micro news products						
TOTAL:	10	24	23	4	27	10
ASNE:	16	44	27	1	11	2
RTDNA:	7	13	21	6	37	16
e. Raising fees from aggregators						
TOTAL:	3	7	31	4	42	12
ASNE:	5	9	44	4	32	6
RTDNA:	2	6	24	4	48	16
f. Revenue embedded in fees people pay their internet providers						
TOTAL:	1	4	16	4	61	13
ASNE:	0	5	27	3	59	5
RTDNA:	2	4	10	4	63	18

Q6 continued…

Q6 continued…

Q6. Here is a list of possible revenue streams people are talking about. Please tell us whether your organization is actively pursuing or considering each one.

[RANDOMIZE ITEMS; ITEM K ALWAYS LAST]	A MAJOR PART OF OUR EFFORT	A SMALL PART OF OUR EFFORT	CONSIDERING BUT HAVE NOT YET BEGUN	CONSIDERED AND REJECTED	HAVEN'T CONSIDERED AT ALL	NO ANSWER
	%	%	%	%	%	%
g. Transaction fees from online retail activity						
TOTAL:	4	17	22	5	38	13
ASNE:	5	21	28	2	38	5
RTDNA:	4	15	19	8	38	17
h. Growing more revenue from local search						
TOTAL:	16	27	18	3	23	12
ASNE:	14	44	23	2	13	4
RTDNA:	17	18	16	4	29	16
i. Concentrating more on display and banner advertising						
TOTAL:	37	36	7	5	7	10
ASNE:	47	39	3	3	5	2
RTDNA:	31	34	9	5	7	14
j. Revenue from non-news products						
TOTAL:	22	38	12	2	14	11
ASNE:	23	54	9	1	10	3
RTDNA:	21	28	15	3	17	16
k. Other (please specify)						
TOTAL:	3	1	1	*	3	92
ASNE:	2	3	1	0	2	92
RTDNA:	4	0	2	*	3	92

Q7. Of the revenue models you are trying, which two are your organization pursuing most actively? [ALLOW ONLY UP TO 2 ANSWERS TO BE SELECTED]

Based on those who are trying two or more revenue models

	TOTAL	ASNE	RTDNA	
%	54	58	51	Concentrating more on display and banner advertising
	38	37	38	Revenue from non-news products
	26	28	24	Growing more revenue from local search
	23	30	17	Fees from specialty niche or micro news products
	9	15	4	Fees from subscription pay walls
	8	2	12	Donations from non profit institutions
	8	2	12	Donations from private individuals
	6	6	6	Transaction fees from online retail activity
	5	5	5	Raising fees from aggregators
	2	1	3	Revenue embedded in fees people pay their internet providers
	4	3	5	Other (please specify)
	2	1	3	No answer
	[N=270]	[N=116]	[N=154]	

Note: Total may exceed 100% due to multiple responses.

Q8. In the last two years, has your news organization tried or discussed a new revenue experiment that has raised concerns about editorial independence or ethics?

	TOTAL	ASNE	RTDNA	
%	36	38	36	Yes
	53	59	50	No
	9	3	13	Don’t know
	1	0	2	No answer

Q8a. If yes, please describe in the space below. [OPEN-END]

Based on those whose news organization has tried or discussed an uncertain revenue experiment

	TOTAL	ASNE	RTDNA	
%	38	35	40	Ad sponsorship of specific content
	26	29	24	Blurring lines between ads and news
	10	13	9	Impacts of partnerships with other groups
	6	2	9	News people in ads or paid programming
	3	2	4	Sales of naming rights to advertisers
	11	13	10	Miscellaneous other
	16	17	16	No answer
	[N=128]	[N=48]	[N=80]	

Note: Total may exceed 100% due to multiple responses.

Q9. Here are some alternative options for funding journalism. For each, please tell us if you have any reservations or would welcome such funding:

[RANDOMIZE ITEMS]		SERIOUS RESERVA-TIONS	SOME RESERVA-TIONS	NEUTRAL	WOULD WELCOME SUCH FUNDING	WOULD BE ENTHUSIASTIC ABOUT SUCH FUNDING	NO ANSWER
		%	%	%	%	%	%
a. Private donations							
	TOTAL:	39	31	8	12	8	1
	ASNE:	31	44	8	13	2	2
	RTDNA:	44	24	9	11	11	1
b. Interest Group donations							
	TOTAL:	78	14	4	3	1	1
	ASNE:	76	16	4	3	0	2
	RTDNA:	79	13	4	3	2	*
c. Nonprofit foundation funding							
	TOTAL:	25	27	16	19	12	1
	ASNE:	16	41	16	20	8	0
	RTDNA:	30	19	17	18	15	1

Q9 continued…

Q9 continued…

Q9. Here are some alternative options for funding journalism. For each, please tell us if you have any reservations or would welcome such funding:

[RANDOMIZE ITEMS]	SERIOUS RESERVA-TIONS	SOME RESERVA-TIONS	NEUTRAL	WOULD WELCOME SUCH FUNDING	WOULD BE ENTHUSIASTIC ABOUT SUCH FUNDING	NO ANSWER
	%	%	%	%	%	%
d. Government tax credits for news consumers						
TOTAL:	38	18	24	14	5	2
ASNE:	41	16	20	16	5	2
RTDNA:	36	18	27	12	4	2
e. Government tax credits for news organizations						
TOTAL:	46	20	15	13	6	1
ASNE:	48	26	10	13	4	0
RTDNA:	44	16	18	13	8	1
f. Direct subsidies from the government						
TOTAL:	75	11	6	3	4	1
ASNE:	88	9	2	2	0	0
RTDNA:	68	12	8	4	6	2

Q9.1 Please share here additional thoughts on any of these funding options, whether good or bad in your view. [OPEN-END]

	TOTAL	ASNE	RTDNA	
%	7	10	4	Need for independence
	6	4	8	Funders will want to influence content
	6	10	4	Live or die with the marketplace
	5	7	4	No government money
	3	4	2	Outside funding must be transparent
	4	1	6	Miscellaneous other
	73	70	75	No answer

Note: Total may exceed 100% due to multiple responses.

Q10. Thinking about online revenues, which do you think will be the most important source for your organization in 3 years? (Please select one.)

	TOTAL	ASNE	RTDNA	
%	29	31	28	Display ads
	21	4	31	Video ads
	15	23	11	Subscription fees
	12	11	12	Revenue sharing from aggregators like Google
	8	17	3	Search ads
	5	2	7	User donations
	6	8	5	Other
	4	4	4	No answer

Q11. Without significant new funds, revenue streams or partnerships, how long do you think your news organization can remain solvent?

	TOTAL	ASNE	RTDNA	
%	1	2	1	Less than 1 year
	6	5	6	1 to 2 years
	24	29	21	3 to 5 years
	17	18	17	6 to 10 years
	46	43	47	More than 10 years
	6	3	8	No answer

Content Creation/Management

Now we want to ask you about your content.

Q12. To what extent is your news outlet moving toward specialized content – that is, choosing to cover certain subject areas in depth and no longer covering others?

	TOTAL	ASNE	RTDNA	
%	19	24	16	Strongly moving in that direction
	41	52	35	Somewhat moving in that direction
	39	23	48	Not moving in that direction at all
	1	1	1	No answer

Q13. Do you feel that this kind of specialization is more of a good thing or more of a bad thing for the future of journalism?

	TOTAL	ASNE	RTDNA	
%	28	22	32	More of a good thing
	28	32	25	More of a bad thing
	43	45	42	Neither a good nor a bad thing
	1	2	1	No answer

Q14. Thinking about the original content you now offer each day, what portion would you say is unique information not yet reported by others?

	TOTAL	ASNE	RTDNA	
%	24	9	33	0-25%
	32	28	35	26-50%
	28	41	21	51-75%
	12	19	8	76-90%
	2	3	2	91-100%
	1	0	1	No answer

Q15. Not including wire services, has your news outlet begun including content produced by outside news organizations or journalist groups?

	TOTAL	ASNE	RTDNA	
%	27	34	22	Yes, on a regular basis
	27	29	25	Yes, but only on rare occasion
	45	37	49	No, not at all
	2	0	3	No answer

Q16. What editing process do you use to satisfy yourself that this outside work is reliable?

Based on those whose new organizations include outside content

	TOTAL	ASNE	RTDNA	
%	46	58	36	Fully edited by us, with additional reporting if we ask for it
	32	25	38	More limited editing, mostly involving style and presentation
	13	6	19	No substantive editing from us other than to fit newshole
	2	2	2	No editing because the agreement specifies that we take their content verbatim
	6	9	5	No answer
	[N=188]	[N=81]	[N=107]	

Q17. Whether you currently run such stories or not, how comfortable are you with the idea of using the work of other news outlets or journalist groups for some of your content?

	TOTAL	ASNE	RTDNA	
%	25	40	17	Very comfortable
	51	47	53	Somewhat comfortable
	17	13	19	Not too comfortable
	6	0	10	Not at all comfortable
	1	0	1	No answer

Now thinking just about your organization's Website Content…

Q18. Please rank in order from 1 to 6 the importance to your brand of each type of information, where 1 represents the most important and 6 the least important. (Please use each number only once.)

	1	2	3	4	5	6	NO ANSWER
	%	%	%	%	%	%	%
a. Original reporting							
TOTAL:	89	4	1	1	*	1	3
ASNE:	92	2	1	1	1	1	2
RTDNA:	87	5	1	1	0	2	4
b. Commentary							
TOTAL:	2	23	17	11	10	31	6
ASNE:	2	45	28	11	5	5	3
RTDNA:	2	10	11	11	14	45	7
c. Multimedia features							
TOTAL:	4	35	24	18	12	4	4
ASNE:	0	23	28	23	18	5	3
RTDNA:	6	41	21	15	9	3	4
d. Aggregated material from legacy news outlets and wires							
TOTAL:	1	18	22	21	22	10	6
ASNE:	1	9	13	24	32	17	3
RTDNA:	1	24	27	19	16	7	7
e. Aggregated material from other outside sources							
TOTAL:	*	3	11	19	33	27	7
ASNE:	1	2	6	11	30	45	4
RTDNA:	0	3	13	24	35	17	8
f. User-generated content							
TOTAL:	1	13	20	24	16	20	5
ASNE:	2	13	20	27	11	23	3
RTDNA:	1	13	20	22	19	19	6

Q19. When it comes to displaying or delivering your site's content to users, how important is each of the following?

[RANDOMIZE ITEMS]	ESSENTIAL	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	NO ANSWER
	%	%	%	%	%
a. Mobile applications or web features					
TOTAL:	41	33	16	4	6
ASNE:	39	41	14	2	4
RTDNA:	41	29	17	5	7
b. Home website					
TOTAL:	74	19	1	1	5
ASNE:	77	18	1	1	4
RTDNA:	73	20	1	1	5
c. E-mail alerts					
TOTAL:	33	36	21	5	5
ASNE:	27	45	24	2	3
RTDNA:	36	32	20	7	6
d. Postings on YouTube or other video sites					
TOTAL:	11	24	40	19	7
ASNE:	6	27	48	15	4
RTDNA:	13	23	35	21	8
e. Postings to social media sites like Twitter or Facebook					
TOTAL:	29	35	27	4	5
ASNE:	23	39	31	3	3
RTDNA:	32	33	25	4	5
f. RSS					
TOTAL:	22	33	30	7	8
ASNE:	25	40	27	4	4
RTDNA:	21	28	32	9	10
g. Widgets or other forms of outside syndication					
TOTAL:	11	27	39	15	8
ASNE:	12	27	44	13	5
RTDNA:	11	26	37	17	9

Q19 continued…

Q19 continued…

Q19. When it comes to displaying or delivering your site's content to users, how important is each of the following?

[RANDOMIZE ITEMS]

	ESSENTIAL	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT IMPORTANT	NO ANSWER
	%	%	%	%	%
h. Listings on user-driven news networks like Digg or Propell					
TOTAL:	5	18	44	25	8
ASNE:	6	18	54	18	4
RTDNA:	4	18	38	29	11

Q20. What percentage of your website traffic comes from outside searches or external sources?

	TOTAL	ASNE	RTDNA	
%	24	20	27	0-25%
	41	48	37	26-50%
	13	13	13	51-75%
	4	4	4	More than 75%
	18	15	19	No answer

Now we want to ask you some questions about newsroom investments and cutbacks…

Q21. In the last three years, has your organization cut back on its news staff, added news staff or has the news staff remained about the same?

	TOTAL	ASNE	RTDNA	
%	71	92	59	Cut back on news staff
	10	2	15	Added news staff
	15	3	22	Remained about the same
	3	2	4	No answer

Q21a. How large was the decrease in your news staff?

Based on those whose news organization had staff cutbacks

	TOTAL	ASNE	RTDNA	
%	24	12	35	Less than 10% decrease
	49	45	53	10 to 24% decrease
	20	33	8	25 to 50% decrease
	3	5	1	More than 50% decrease
	4	5	3	No answer
	[N=251]	[N=118]	[N=133]	

Q21b. How large was the increase in your news staff?

Based on those whose news organization added staff

	TOTAL	RTDNA	
%	31	30	1 to 5% increase
	25	27	6 to 10% increase
	11	9	11to 24% increase
	22	24	25 to 50% increase
	8	6	More than 50% increase
	3	3	No answer
	[N=36]	[N=33]	

There are too few cases to report for ASNE [N=3].

Q22. Some people say their news staff had gotten larger than necessary and with cutbacks is still big enough to provide robust coverage. Others believe the cutbacks have materially hurt their ability to do their job.

Thinking about your own organization, which of these statements comes closer to your view?

	TOTAL	ASNE	RTDNA	
%	8	9	8	Our staff is now still plenty big to do the job.
	66	70	64	Our staff is leaner than ideal but can do the job well.
	20	16	22	Our staff is now too small to do more than the bare minimum level of reporting.
	2	4	1	Our staff is now so small that it cannot meet the needs of our news operation.
	4	2	5	No answer

Q23. What change in your newsroom, if any, has HELPED most your ability to cover the news well? [OPEN-END]

	TOTAL	ASNE	RTDNA	
%	19	28	14	Change in staff structure, leadership or management
	18	11	22	Adoption of new technologies, not including use of the Internet
	14	25	8	Change in culture, emphasis, values in the newsroom
	10	16	7	Adoption or increased use of Internet resources
	7	4	8	Having people do many jobs using many skills
	5	6	4	Partnerships
	3	2	3	Adding digital journalists
	3	1	4	Miscellaneous other
	1	2	1	None/Nothing
	30	23	34	No answer

Note: Total may exceed 100% due to multiple responses.

Q24. What change in your newsroom, if any, has HURT most your ability to cover the news well? [OPEN-END]

	TOTAL	ASNE	RTDNA	
%	40	56	31	Staff cuts
	14	16	12	Budget cuts
	5	5	5	Lack of solid journalistic experience in newsroom
	4	2	5	Demands for many delivery platforms
	4	3	4	More news, not enough time to cover
	4	2	5	Problems with equipment/technology
	1	1	2	Inflexibility or shortcomings of staff/management
	5	4	6	Miscellaneous other
	3	3	4	None/Nothing
	30	20	36	No answer

Note: Total may exceed 100% due to multiple responses.

Now just a few questions about your personal background…

Q25. Please indicate which type of news organization you currently work for: (You may select up to two choices.)

	TOTAL	ASNE	RTDNA	
%	44	2	68	Television
	35	92	2	Newspaper
	21	27	18	Internet
	17	2	26	Radio
	2	2	2	Newswire
	1	2	0	Magazine
	*	0	*	Trade Journal
	4	3	4	No answer

Note: Total may exceed 100% due to multiple responses.

Q26. How many years of experience do you have in a newsroom setting? If you have less than a year experience, please enter "0" in the box. [Enter total number of years]

	TOTAL	ASNE	RTDNA	
%	0	0	0	Less than a year
	4	0	7	1-5 years
	5	2	6	6-10 years
	15	5	21	11-20 years
	72	90	62	More than 20 years
	4	3	4	No answer

Q27. What is your age?

	TOTAL	ASNE	RTDNA	
%	4	1	5	Under 30
	36	20	45	30-49
	52	68	43	50-64
	4	7	2	65 or older
	4	4	4	No answer

Confirm. ASNE, RTDNA and PEJ pledge to keep your answers to these questions confidential. Only summary results from the survey will be released. Strictly to ensure that the survey is being conducted to the highest quality standards, we would like to confirm that you are <<INSERT FROM SAMPLE>>, who was the journalist that was sent this User Name. If that is correct, please check Yes. If not, please check No and then fill in your name and title.

	TOTAL	ASNE	RTDNA	
%	95	95	94	Yes
	1	2	1	No
	4	3	5	No answer

Confirm2. If no, could you please give us your name and title at your organization?

Based on those who are not the original target respondents

	TOTAL	ASNE	RTDNA	
%	75	50	100	Gave name and title
	25	50	0	No answer
	[N=4]	[N=2]	[N=2]	

Contact. A member of the research staff from one of the organizations sponsoring this survey may want to re-contact some of the journalists who participated in this survey. Would you be willing to be contacted by telephone to answer a follow-up question?

	TOTAL	ASNE	RTDNA	
%	67	71	65	Yes
	29	26	30	No
	4	3	5	No answer

Contact2. Could you please give us a telephone number where we can best reach you? (Please enter as a 10-digit phone number, beginning with the area code.)

Based on those who would be willing to be recontacted

	TOTAL	ASNE	RTDNA	
%	97	99	97	Gave a phone number
	3	1	3	No answer
	[N=237]	[N=91]	[N=146]	

Comment. This brings us to the end of the interview. If you have any additional thoughts about the state of journalism today or about this survey, please share them with us. [OPEN-END]

	TOTAL	ASNE	RTDNA	
%	26	24	27	Gave answer
	74	76	73	No answer

EXIT PAGE

Thank you for taking the time to complete this survey. Your responses are very important to our research.

Radio Television Digital News Association: http://www.rtdna.org

American Society of News Editors: http://asne.org

Project for Excellence in Journalism: http://www.journalism.org