

clicks communities and conversations

The state of journalism in 2011

Oriella PR Network Digital Journalism Study



O R I E L L A
P R • N E T W O R K

Executive summary

The Oriella Digital Journalism study is an annual survey of journalists worldwide carried out by the Oriella PR Network, a leading global alliance of independent technology PR agencies. This year is the fourth year the study has been carried out and it is based on responses from almost 500 journalists from broadcast, national, trade and consumer titles in 15 countries.

Key headline trends from the study:

- The slump in advertising revenues is slowing. This year, barely 20 percent of the journalists surveyed expected their publications to see a fall in revenue. In 2010, however, 62 percent said this was the case, and in 2009 the figure was 66 per cent. Though it is perhaps too early to talk of resurgence in the media, the picture is certainly a good deal less bleak than it was a year ago. The proliferation of digital channels is playing an increasingly important role.
- Those polled say that the popularity of online media is gradually eclipsing that of 'offline' publications. This year, the proportion of respondents who agreed their offline print or broadcast outlet had the biggest audience fell to 50 percent for the first time. This development has significant implications for how brands communicate – both in terms of the content they produce, and the ways in which they communicate their messages to journalists.
- Social media are permeating the newsroom. Increasingly journalists are using digital channels such as blogs and Twitter to source and verify story leads. While traditional PR channels, such as briefings and press releases, remain highly valued, the study highlights the increasing emphasis 'print' journalists place on digital communications.

Has the dust finally settled?

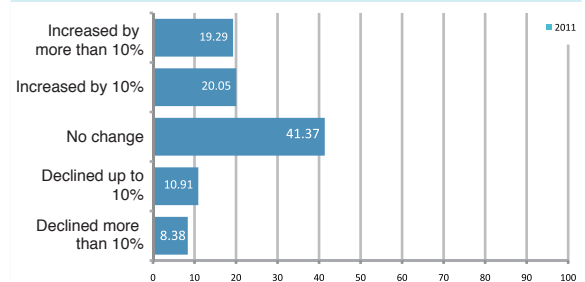
The past two years have not been kind to the media in many parts of the globe. Important titles have dropped their print editions to move online, or closed down altogether, as publishers have sought to reduce their overheads in the face of falling advertising revenues. In 2009, 32 percent of the journalists surveyed believed

their publication would be taken off the market (no timescales were specified). In 2010, this figure had risen to 53 percent. However, in 2011 just 21 percent believed closure was likely – a significant fall compared with the previous year.

Only in Spain did a significant majority of journalists still fear for the future of their publications – perhaps a reflection of the continuing economic difficulties the country is experiencing.

One might deduce that the growing optimism is related to an increase in audience numbers. In 2010, 41 percent of the journalists surveyed said they expected their audiences to decline. This year, the figure was reduced to just nine percent.

Figure 1. How have your advertising revenues changed over the past year?



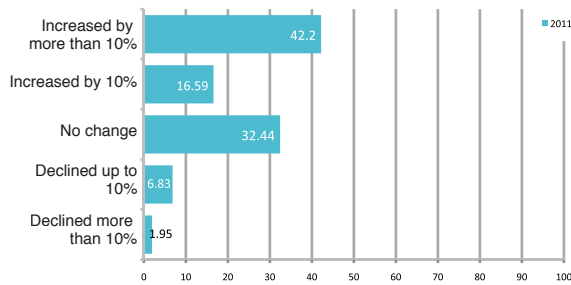
source: Digital Journalism Study 2011 - Oriella PR Network

Perhaps as a consequence of returning audiences, the business outlook for the media represented in the study is also improving. In 2009, with the slowdown at its nadir, more than half of the journalists surveyed expected revenues at their titles to decline by more than 20 percent. In 2010, the proportion had fallen to 40 percent – still a troubling figure. This year, just eight percent of respondents expected such a substantial fall in revenues.

Figures from the advertising industry support this view. According to ZenithOptimedia¹, advertising spend during 2011 is expected to grow by almost six percent globally during 2011 – driven to some extent by the improved economic outlook in Western Europe and the USA

¹ZenithOptimedia Ad Spend Forecast, April 2011, <http://www.zenithoptimedia.com/files/media/image/news/Press%20Release%20files/2011/April/Adspend%20forecasts%20April%202011.pdf>

Figure 2. How has your audience changed over the past year?



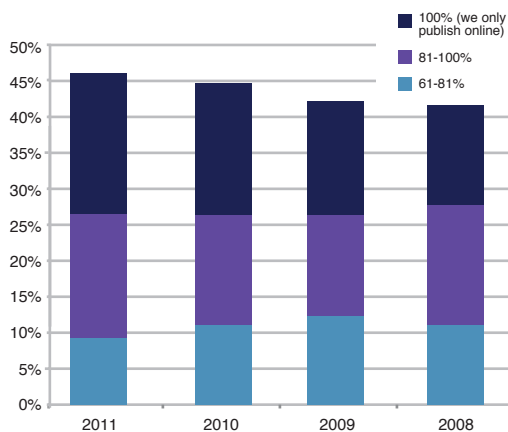
source: Digital Journalism Study 2011 - Oriella PR Network

Is Digital Eclipsing Print?

One of the key objectives of the Oriella Digital Journalism Study is to chart the growing impact of digital channels on 'traditional' print and broadcast media formats. Each year, journalists are asked to say where their publication has the largest audience, and give an indication of how much of their online content is new – in other words, not a re-publication of an offline story.

In terms of content, just under half of the journalists surveyed (46 percent) said more than 60 percent of their online output was new (i.e. not repurposed from existing offline content) – broadly in line with 2010, but a substantial increase compared with the first Digital Journalism Study in 2008, when the figure was 36 percent. The figures demonstrate a clear shift of journalistic resources towards online channels. The fact that the proportion

Figure 3. Approximately how much of your online content is new (ie not repetition of existing offline content)?



source: Digital Journalism Study 2011 - Oriella PR Network

of new online content has remained largely unchanged since last year might indicate that publishers believe they have struck the right balance between offline and online formats, and are now looking to maximise the potential audiences for both.

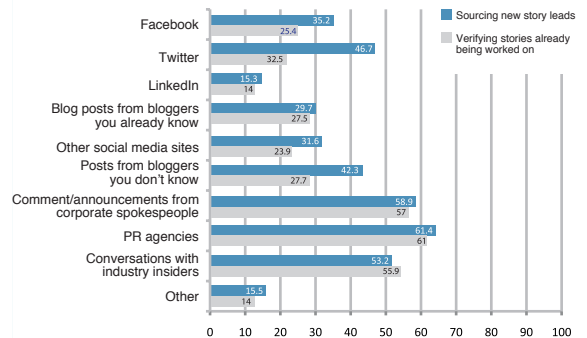
ZenithOptimedia's projections predict that digital will eclipse print in terms of advertising revenues by 2013. With print media experiencing a slow but steady decline, Internet advertising spend is meanwhile growing an average of 14 percent a year. It will be interesting to see how the shifting sands of the advertising markets play out in terms of output and resourcing of editorial teams over the next few years.

The Newsroom Goes Social

Given many publications' gradual shift from print to online output, we asked, for the first time this year, how widely digital and social media are used within newsrooms themselves. Journalists were asked about the extent to which they use social media both for sourcing new leads, and verifying stories journalists are already working on.

When it comes to sourcing new story angles, almost half (47 percent) of respondents said they used Twitter, and a third (35 percent) used Facebook. Blogs were also highlighted as a key element of the sourcing process, with 30% saying they used blogs they were already familiar with. More interesting still, forty-two percent of respondents drew on posts from blogs they had not visited before.

Figure 4. Please select which of the following you use when SOURCING new story leads?



source: Digital Journalism Study 2011 - Oriella PR Network

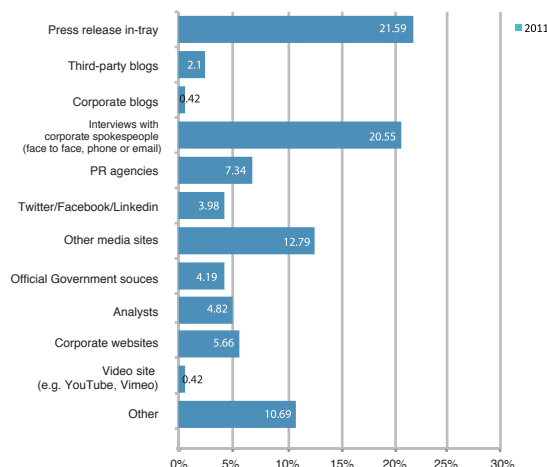
Lies, damn lies, and Twitter?

That is not to say, however, that ‘conventional’ PR vehicles are losing their appeal. Nearly two thirds (62 percent) said they sourced stories from PR agencies, with 59 percent citing corporate spokespeople as sources.

When it comes to validating existing stories, use of social and digital media was lower, but nonetheless significant. A third of journalists used Twitter to verify their stories, while a quarter used Facebook and blogs. However, use of ‘official’ channels such as press officers and PR agencies is far higher. Sixty-one percent of respondents said they used PR agencies for verification, and 57 percent turned to corporate spokespeople.

While the survey did not explicitly ask whether journalists actually cited these sources in their copy or merely referred to them for fact-checking, we can nonetheless conclude that social media are playing an increasingly vital role in news-gathering. Nonetheless, if a journalist needs to check a fact or verify a story, brands and their agencies remain the first ports-of-call. For their part, brands need to be cognizant of, and cater for, the wide range of content requirements journalists have. In particular, we believe brands need to build credible, responsive social media identities if they are to stand out from the crowd.

Figure 5. Which of the following would be your first port of call when researching a news or feature story?



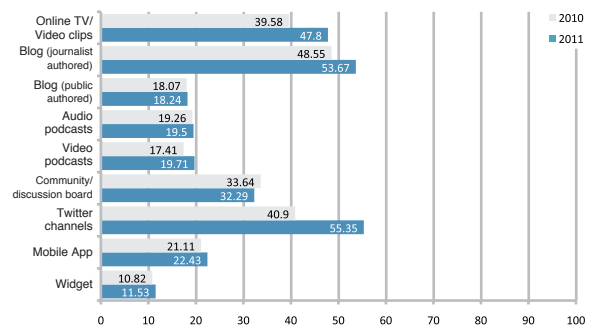
source: Digital Journalism Study 2011 - Oriella PR Network

Social Shapes Output

Publications’ own social media output has hit its highest levels since the study began. For

the first time, more than half of the journalists surveyed said their publications had a Twitter feed (55 percent) and journalist-authored blogs (54 percent). Video, too, reached a high with almost half of respondents (48 percent) saying their titles published video online.

Figure 6. Which of the following formats do you offer online?



source: Digital Journalism Study 2011 - Oriella PR Network

The survey also charted how many publications no longer have any kind of social media content at all in their output. In the inaugural Digital Journalism Study (published 2008), a quarter of respondents said their publications featured neither blogs, podcasts, discussion boards or other interactive assets. In 2010 the proportion fell to an eighth, and has stayed at that level this year. It remains to be seen whether the penetration of social media into publications’ outputs has reached a plateau, or whether it will inexorably continue, in line with the migration of audiences and advertising revenues from print to online.

This proliferation of channels for journalistic output has inevitably increased the pressure on reporters. Almost half (45 percent) are expected to produce more content, and a third (34 percent) work longer hours. Respondents were equivocal on the benefits these new channels have brought to the quality of their publications’ output. Less than half (47 percent) said the quality of their title’s journalism has improved over the past two years, and a third (31 percent) were undecided – figures that were broadly in line with 2010’s study (when the proportions were 46 percent and 32 percent respectively).

On a more positive note, this year’s survey did capture a marked improvement in journalists’ overall job satisfaction. Forty-four percent of the respondents said they enjoyed their job more, compared with 34 percent in 2010 and just 27 percent in 2009. We assume that

publications' improved balance sheets, and the increasing effectiveness of their online strategies, is gradually improving the lot of the journalist. Today's reporters are busier than ever, work in real-time and operate across more platforms than ever before. Brands are well advised to pay heed to the changing world of journalism in all of the countries they operate in, and adapt their communications strategies accordingly.

The impact on the job

- PR is best suited to 'own' digital media – while the outcomes of digital communications campaigns often support marketing objectives, the study shows that brands can no longer afford to manage digital communications for marketing and corporate communications in separate silos. If one function should have overall ownership of a digital communications, it is corporate comms.
- Social media are becoming a key barometer of influence – journalists are using platforms such as blogs and Twitter not only for their research, but also for publication. Brands wishing to stand out from the crowd must ensure they communicate their stories and messages effectively to their own digital followings, as well as complementing conventional written collateral with infographics, videos and opinion-led content which journalists can re-publish. Savvy brands will adopt digital tactics that help key journalists perceive them as trusted, influential sources.
- Transparency is vital – while journalists are happy to make use of a widening range of PR-generated content assets, they need to be transparent about both its provenance and its veracity. Companies must make sure materials are branded clearly. Additionally, the source and methodologies behind any statistics cited must be made clear.
- The story remains key – the proliferation of channels makes a single, clear storyline, communicated effectively in text, video and images more important than ever. Brands must ensure their message does not get lost in its delivery.
- Be ready to be sucked into conversations you don't 'own' – all it takes is an isolated tweet on a topic that is trending to bring a brand into a story it may have no wish to be a part of. Effective monitoring and containment strategies are vital for communicators to protect corporate reputations.

With special thanks to

Sam Kane, Brands2Life

Robin Grainger, Brands2Life

And all the partners and journalists who participated in the study

About the Oriella PR Network



The Oriella PR Network is an alliance of 15 communications agencies in 20 countries around the world. Our partnership of independent agencies was built upon a set of global best practices and close working relationships not offered by others of its kind. The network was founded by Brands2Life and Horn Group with the support of agencies around the world with whom they have worked successfully on client projects - in some cases for many years. Oriella partners exist in major and secondary markets throughout The Americas, Europe, Middle-East and Africa and Asia/Pacific.

The Digital Journalism Study was compiled in March and April 2011, using an online survey of 477 journalists from broadcast, national, regional and trade media across Brazil, Eastern Europe, France, Germany, Italy, Spain, Sweden, The Netherlands, The UK and The US.

Contact details

UK

Brands2Life
Giles Fraser
+44 207 592 1200
giles.fraser@brands2life.com

US

The Horn Group
Shannon Latta
+1 415 905 4030
slatta@horngroup.com

Belgium / The Netherlands

LVT PR
Charly Lammers van Toorenburg
+31 (0) 30 656 5070
charly@lvtp.nl

Brazil

Vianews
Pedro Cadina
+55 (11) 3865 9990
pedro.cadina@vianews.com.br

China

Rice Communications
Sonya Madeira Stamp
+65 6221 8729
sonya.madeira@ricecomms.com

France

Ballou PR
Anouk Jacob
+33 (0)1 42 22 24 10
anouk@balloupr.com

Clipping TU

Jean-Louis Aubert
+33 (0)1 44 59 69 00
jean-louis@clipping-tu.com

Germany

Fink & Fuchs Public Relations AG
Katja Rodenhäuser
+49 (0) 611 741 3159
katja.rodenhauser@ffpr.de

PR-Com

Alain Blaes
+49 (0)895 999 7700
alain.blaes@pr-com.de

Italy

Noesis
Giovanna Pandini
+39 02 8310511
giovanna.pandini@noesis.net

Spain

Canela PR
Deborah Gray
+34 932 690 993
dgray@canelapr.com

Sweden

Westmark Information
Mikael Westmark
+46 8 522 378 00
mikael@westmark.se