



The Changing Newsroom: What is Being Gained and What is Being Lost in America's Daily Newspapers?

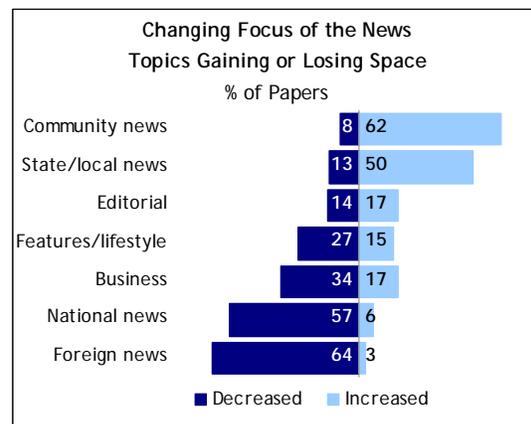
INTRODUCTION

Meet the American daily newspaper of 2008.

It has fewer pages than three years ago, the paper stock is thinner, and the stories are shorter. There is less foreign and national news, less space devoted to science, the arts, features and a range of specialized subjects. Business coverage is either packaged in an increasingly thin stand-alone section or collapsed into another part of the paper. The crossword puzzle has shrunk, the TV listings and stock tables may have disappeared, but coverage of some local issues has strengthened and investigative reporting remains highly valued.

The newsroom staff producing the paper is also smaller, younger, more tech-savvy, and more oriented to serving the demands of both print and the web. The staff also is under greater pressure, has less institutional memory, less knowledge of the community, of how to gather news and the history of individual beats. There are fewer editors to catch mistakes.

Despite an image of decline, more people today in more places read the content produced in the newsrooms of American daily newspapers than at any time in years. But revenues are tumbling. The editors expect the financial picture only to worsen, and they have little confidence that they know what their papers will look like in five years.



This description is a composite. It is based on face-to-face interviews conducted at newspapers across the country and the results of a detailed survey of senior newsroom executives. In total, more than 250 newspapers participated. It is, we believe, the most systematic effort yet to examine the changing nature of the resources in American

newspaper newsrooms at a critical time. It is an attempt to document and quantify cutbacks and innovations that have generally been known only anecdotally.

The study, by journalist Tyler Marshall and the Pew Research Center's Project for Excellence in Journalism, captures an industry in the grips of two powerful, but contradictory, forces. On one hand, financial pressures sap its strength and threaten its very survival. On the other, the rise of the web boosts its competitiveness, opens up innovative new forms of journalism, builds new bridges to readers and offers enormous potential for the future. Many editors believe the industry's future is effectively a race between these two forces. Their challenge is to find a way to monetize the rapid growth of web readership before newsroom staff cuts so weaken newspapers that their competitive advantage disappears. In recent weeks—after this survey was completed—a new round of newsroom cutbacks, made against a backdrop of steadily deteriorating advertising revenues and rising production costs, intensifies the difficulty of the challenge.

This report is an attempt to document where newspapers are in that race. As editors cut back on coverage and staff, while at the same time building up their capacity online and in multi-media, what is being gained and what is being lost? What coverage is disappearing and what beats are considered sacrosanct? What new expertise has come into the newsroom, and what knowledge has been lost? In short, where is the industry headed?

The Key Findings:

- The majority of newspapers are now suffering cutbacks in staffing, and even more in the amount of news, or newshole, they offer the public. The forces buffeting the industry continue to affect larger metro newspapers to a far greater extent than smaller ones. In some cases, these differences are so stark it seems that larger and smaller newspapers are living two distinctly different experiences. Fully 85% of the dailies surveyed with circulations over 100,000 have cut newsroom staff in the last three years, while only 52% of smaller papers reported cuts. Recent announcements of a further round of newsroom staff reductions at large papers, including the Los Angeles Times, the Chicago Tribune and the Washington Post, indicates these differences may be widening further. Our survey found that more than half of the editors at larger papers and a third at smaller ones expect more cutbacks in the next year. But a weaker-than-expected economic performance during the first half of 2008 and grimmer forecasts for the rest of the year suggest some of those cutbacks have already been implemented and darken these projections even further.
- Papers both large and small have reduced the space, resources and commitment devoted to a range of topics. At the top of that list, nearly two thirds of papers surveyed have cut back on foreign news, over half have trimmed national news and more than a third have reduced business

coverage. In effect, America's newspapers are narrowing their reach and their ambitions and becoming niche reads.

- The culture of the daily newspaper newsroom is also changing. New job demands are drawing a generation of young, versatile, tech-savvy, high-energy staff as financial pressures drive out higher-salaried veteran reporters and editors. Newsroom executives say the infusion of new blood has brought with it a new competitive energy, but they also cite the departure of veteran journalists, along with the talent, wisdom and institutional memory they hold as their single greatest loss. Clearly stretched to describe what is unfolding in their newsrooms, editors use words like, "exciting," "extraordinary," "nerve-wracking" and "tumultuous."
- Newspaper websites are increasingly a source of hope but also of fear. Editors feel torn between the advantages the web offers and the energy it consumes to produce material often of limited or even questionable value. A plurality of editors (48%), for instance, say they are conflicted by the trade-offs between the speed, depth and interactivity of the web and what those benefits are costing in terms of accuracy and journalistic standards. Yet a similar plurality (43%) thinks "web technology offers the potential for greater-than-ever journalism and will be the savior of what we once thought of as newspaper newsrooms."

Amid these concerns—and despite the enormous cutbacks and profound worries—editors still sense that their product is improving, not worsening. Fully 56% think their news product is better than it was three years earlier.

"I believe the journalism itself is discernibly better than it was a year ago," said the editor of a large metropolitan daily, whose paper last year lost 70 newsroom employees. "There's an improvement in enterprise, in investigations and in the coverage of several core beats."

How such upbeat assessments stand up in the face of new staff cuts and more pessimistic economic projections is unclear. Several editors lamented the attendant loss of time to organize a thoughtful attack on a story, to think through precisely why a story is being done or how to make the story more meaningful. "There is a huge pressure to rush to publish," one editor added in a comment on the survey.

Overall, newsroom executives say they feel broadly unprepared for the changes sweeping over them and seem uncertain where the changes would lead. Only 5% of those responding to the survey said they were very confident of their ability to predict what their newsrooms would look like five years from now.

"I feel I'm being catapulted into another world, a world I don't really understand," said Virginian-Pilot Editor Denis Finley. "It's scary because things are

happening at the speed of light. The sheer speed (of change) has outstripped our ability to understand it all.”

These are some of the findings of the study, which is based on interviews at newspapers in 15 different cities from four distinct regions of the country and a survey of senior news executives from 259 newspapers. That sample of newspaper executives includes more than half of all newspapers over 100,000 in circulation, and roughly one-third of those with circulations between 50,000-100,000. In total, more than one in every five of the nation’s 1,217 daily newspapers participated, making it one of the broadest surveys of its kind in recent years. The survey was executed online with the help of Princeton Survey Research Associates during the first quarter of 2008.

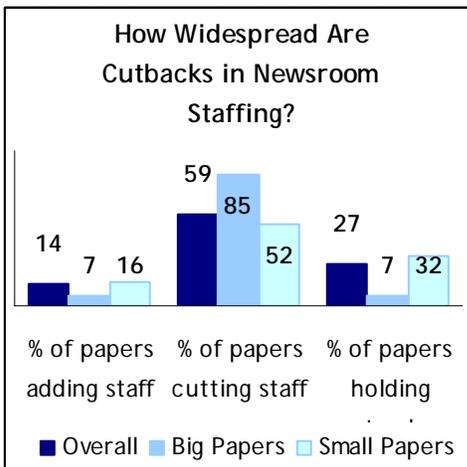
In this report we divide the analysis into six main areas:

- I.** Cutbacks, which examines the depth of staff reductions and how larger and smaller newspapers have been affected;
- II.** Changing Content, which looks at what topics are losing space and resources, which are growing and which are holding steady;
- III.** The Changing Newsroom, which charts the transformation of newsroom skills, demands and culture;
- IV.** The Influence of the Web, which studies the enormous impact newspaper websites are having on newsrooms and on daily newspaper journalism;
- V.** Citizen In the Newsroom, which explores the growing influence and impact of journalism produced by non-professional journalists; and
- VI.** The Future, which weighs the implications of smaller newsrooms, greater innovation, more financial pressures and the struggle to monetize the web.

I. STAFF CUTBACKS

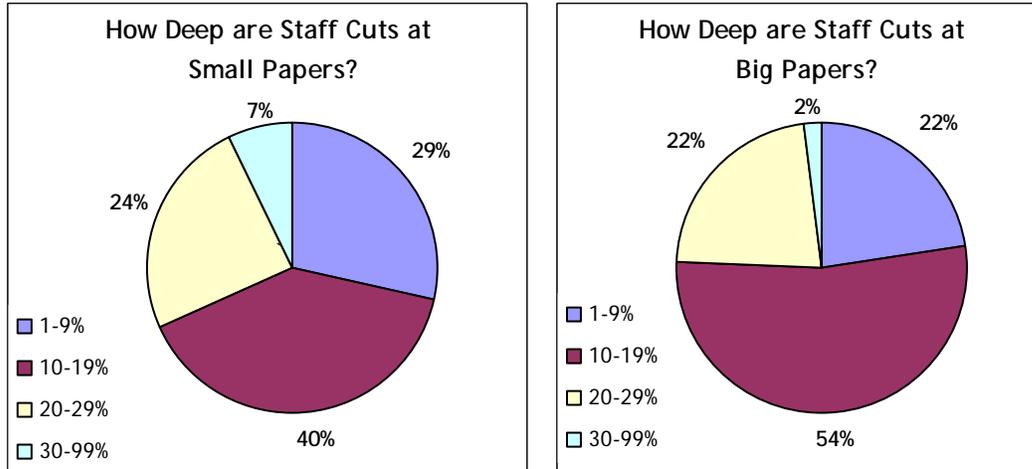
There is a little doubt that American newspapers are cutting back.

Well over half (59%) of the 259 newspapers participating in the survey have reduced full-time newsroom staff over the past three years, mainly because of financial pressures. Roughly the same number (61%) also reported a decrease in their overall newshole—the physical space in the paper available for stories.



The hammer has hit newspapers with circulations of over 100,000 significantly harder than those with smaller circulations. Fully 85% of these larger papers have reduced newsroom staff in the past three years, compared with 52% at the smaller papers. The cuts made by larger papers have also been marginally deeper than those carried out by their smaller counterparts and newshole shrinkage has been more dramatic.

At the same time, fewer large newspapers (7%) have added staff than their smaller cousins (16%) and when they have added, the additions have been smaller. Editors at larger papers also envision a gloomier future. Over half (56%) the newsroom executives responding from larger papers said they anticipated further newsroom cuts over the next 12 months compared to just 30% of editors from smaller papers.



More broadly, the study suggests two very different experiences, with smaller newspapers apparently better anchored into their communities and with more deeply involved readerships, enjoying greater stability.

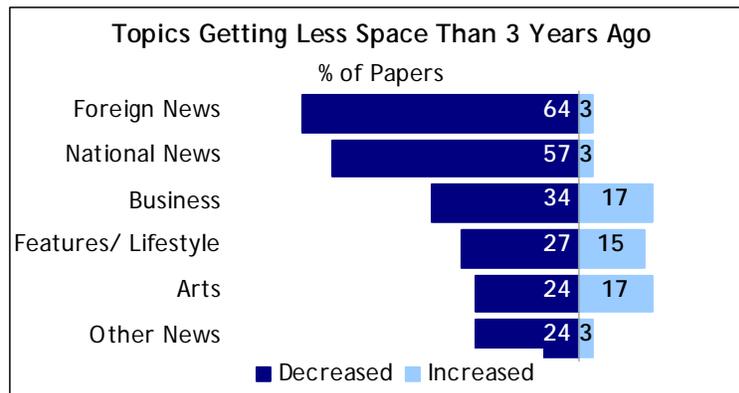
II. CHANGING CONTENT

What Topics Are Losing Space and Resources

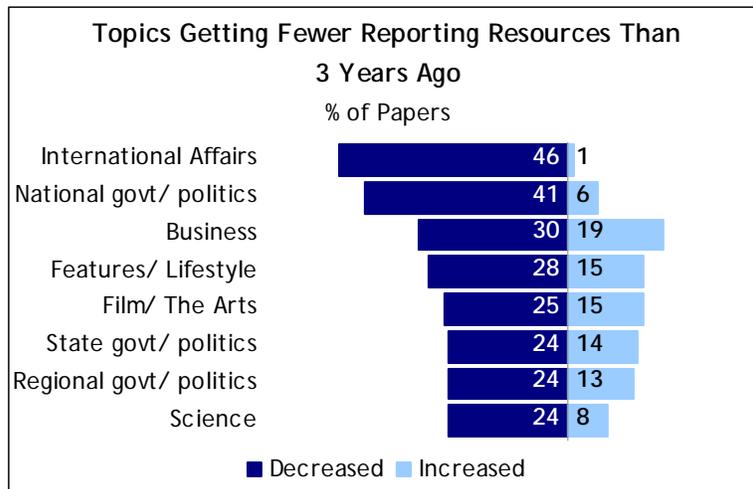
If the papers are smaller in the number of pages and the staffs producing them are shrinking as well, what is being lost and what is being gained? The survey and the in-depth interviews suggest that more is disappearing than is being added.

The survey used three different measures to probe the question. It asked about space devoted to a range of topics. It asked about the amount of reporting resources assigned to cover each topic. And it asked how essential editors thought each topic was to their paper's identity.

By all three measures, international news is rapidly losing ground at rates greater than any other topic area. Roughly two-thirds (64%) of newsroom executives said the space devoted to foreign news in their newspaper had dropped



over the past three years. Nearly half (46%) say they have reduced the resources devoted to covering the topic—also the highest percentage recording a drop. Only 10% said they considered foreign coverage “very essential.”



This decline in foreign news occurs as U.S. armed forces confront stubborn insurgencies in Iraq and Afghanistan, the Administration talks of a global war on terrorism and international trade increasingly impacts the everyday lives of Americans.

Surprisingly, there has been an almost

identical level of decline in international news among smaller newspapers and the country’s larger metropolitan dailies, many of which historically have valued foreign correspondence highly enough to underwrite their own foreign reporting staffs. Among the larger papers, 65% say they have cut space, and 46% say they have decreased reporting resources to it—virtually no different from their smaller counterparts. And barely a quarter (26%) of editors from these larger papers still considered foreign news as “very essential,” compared to just 6% of their colleagues from smaller dailies. Several papers, including the Boston Globe, Philadelphia Inquirer, Baltimore Sun, and Newsday—all with proud traditions of foreign correspondence—have closed their last overseas bureaus in the past three years and now rely mainly on the shrinking number of other outlets for their international news.

This doesn’t mean these larger papers have entirely abandoned original reporting from abroad. For example, the Philadelphia Inquirer (circulation: 334,000) closed the last of its foreign bureaus in November, 2006, yet it still maintains money in its editorial budget for staff foreign travel. Inquirer Editor Bill Marimow said this money is tapped when editors conclude a staff reporter can add significant value to a story.

The fall from favor of national news was similar, albeit slightly less pronounced. Well over half (57%) of newsroom executives said they had reduced the space devoted to national news during the past three years. Four out of ten (41%) said they had cut reporting power devoted to national government/politics and only 18% of editors considered national news “very essential.” This decline came despite one of the most compelling presidential primary races in decades.

Several editors also noted that the national and foreign news that does make it into their papers, is often displayed less prominently. Stories in these categories that were once considered worthy of front page display now frequently appear inside the paper.

“Maybe there was a spot on the front page that everyone considered was the foreign or national story of the day, but that’s changed,” said Sharon Rosenhouse, managing editor of the Ft. Lauderdale Sun-Sentinel (circulation: 218,000). “That story is still in the paper, but it’s just inside. To make the front page, it has to be a significant development or a story that we can see through Florida eyes or some kind of Florida prism.”

This decline in national news coverage appears to be part of a larger trend in which America’s dailies have begun reducing routine staff coverage of events outside their immediate circulation area. The editor of a large metro daily said he still sent his paper’s movie critic to cover out-of-town film festivals, but now limited the assignment to only a few days instead of the full event.

“We still have the coverage,” this editor said. “But instead of the full ten days, we’ll go for five.”

Other events that once rated staff coverage are now left to wires.

“There was a time we’d cover big national stories, but we rarely do that anymore,” said this same editor. “In sports, for example, we’ll go to fewer big, out-of-area college basketball, football or auto racing events or games that don’t involve a local team. We take all the major wires, so that’s what we use.”

When editors feel national stories do require staff coverage, many now say they try to find a way to do something entirely unique—to make it part of their distinct franchise. The St. Petersburg Times (circulation 316,000), for example, decided against putting its Washington bureau chief and some members of its political team on the presidential campaign trail, but instead assigned them to an exclusive feature called “PolitiFact,” which effectively runs truth tests on the statements of candidates. The feature, replete with detailed explanations and a “Truth-O-Meter”, rates a comment as true, mostly true, mostly false, false or—if egregiously false—a “pants on fire.”

Space and resources devoted to the coverage of science, business, the arts, and lifestyles have also fallen over the past three years.

Newsroom executives who say they have eliminated jobs that cover specialized beats, such as film or music critics, book reviewers, columnists, national or foreign correspondents, said they had in many cases replaced newsroom-written contributions with syndicated or news agency content—content they get at a fraction of the cost of producing it with staff.

Such tactics have probably stemmed the loss of coverage, but they do carry other costs. Editors say such staff losses reduce their ability to shape coverage to fit the community’s specific interests or needs. For example, offering special treatment to an election in a far-off country that has a large immigrant population locally is no longer in the hands of the paper’s senior editors. Instead, those editors are reliant on agency

offerings over which they have far less control. The decline of prestigious newsroom jobs also affects recruitment of new talent, the brightest of which are drawn to newspapers with a broad range of challenging jobs.

At another level, this shrinkage of specialized beats reduces the marketplace of ideas and interpretations as more newspapers decide to cut plum (and thus, expensive) jobs because they can “buy the content elsewhere.” Such a process concentrates the power and the responsibility that goes with reporting these areas into the hands of those organizations that still provide such coverage. One executive editor remarked how, after being forced to lay off the paper’s art critic, the choice of a further staff cut then focused on either the resident film or music critic.

“I hated to make that cut,” the editor said. “I read all these things about how cutting film critics is a good choice because you can get film criticism from other places, but those are the same arguments you hear about foreign coverage, national coverage or state government coverage. Eventually, you wake up one day and find there *is* no somewhere else because everyone has done the same thing you’ve done. It’s very troubling.”

Science reporting is one such example. Research conducted by Cristine Russell of the Shorenstein Center on the state of science journalism estimates that of the 95 newspapers that published special science sections in the 1980s, only about 35 still do so today. If editor enthusiasm is any measure, a reversal of this trend seems unlikely. Only 10% of editors responding to the PEJ survey said they considered science and technology reporting “very essential” to the quality of their news product.

In making these cuts, editors also don’t necessarily eliminate subject matter altogether. Instead, they tend to dilute it.

Reporters who once concentrated on one beat or specialty now frequently have two or three. Newspapers, for example, that had one reporter assigned to cover local courts might now also assign the same reporter to cover city hall or education after laying off those who covered those beats. In interviews, editors of newspapers that had undergone significant newsroom cuts repeatedly found themselves hard-pressed to name beats that had been abandoned completely. But they agreed the coverage had become thinner and, because of that, its quality had diminished.

Stories are not the only things being downsized to accommodate a smaller newshole. Editors said they are reducing the size of the daily crossword, eliminating stock tables and other tabular material, or scrapping the daily television listings (while keeping the Sunday TV supplement that contains the week’s listings). Yet editors told us these sorts of cuts have frequently been met with intense reader protest, even though the material remains available online. Conversely, more draconian measures, such as cutting foreign news, eliminating or merging features sections, laying off the staff science writer or downsizing the editorial pages have produced comparatively modest reader reaction.

Said Diane McFarlin, publisher of the Herald-Tribune Media Group in Sarasota, Florida (Herald Tribune circulation: 114,904), “I’ve gotten no letters from people saying, I don’t think you’re covering as much local news or not doing enough investigative pieces. What I get is hate mail about taking the TV listings, cutting the size of the crossword or moving the comics around. That’s what enrages people.”

But she also cautioned, “The industry may think it’s getting away with eroding local news coverage because it’s an incremental loss and readers don’t react as vociferously and immediately as they do to the loss of daily standards like TV listings and comics.”

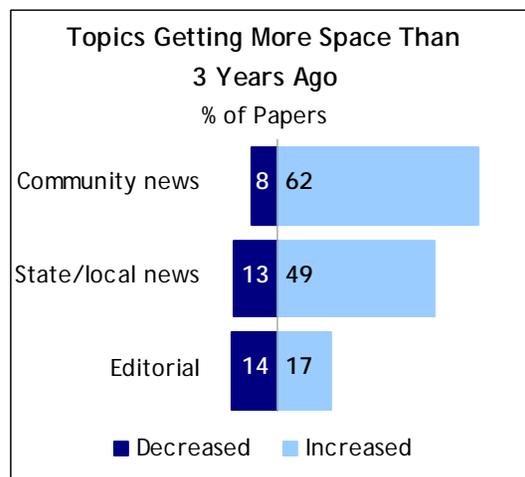
What Topics Are Growing

As editors struggle to manage loss, they are also searching for the “franchise” elements of coverage that give people a reason to still read *their* paper. What is the essential niche? To many editors, the key task is identifying what issues matter most to readers and improving coverage of them—both in print and online—as they trim elsewhere.

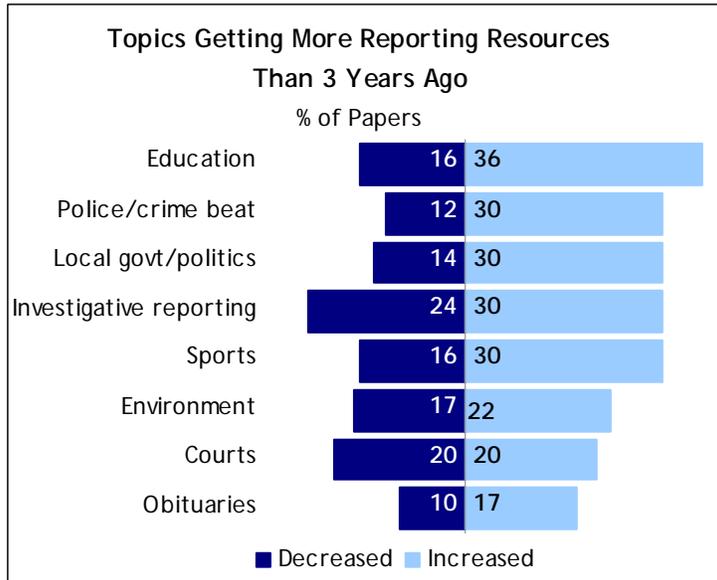
The reporting and survey data suggest that this search is leading daily newspapers to focus their diminishing resources closer to home. A whopping 97% of editors rated local news “very essential” to their news product—by far the highest percentage of any news category. Even America’s largest newspapers—those with the greatest reach—gave their highest “very essential” rating (94%) to local news. However, larger and smaller papers diverged sharply on the importance of closer in, even more local, neighborhood, or so-called “hyper-local” news. By nearly a 2-1 margin (83% to 48%), editors from smaller papers placed greater value on neighborhood news than their counterparts from larger papers.

Editors’ responses also indicated that community news is the biggest overall gainer in space. At a time of shrinking newshole, nearly two-thirds (62%) of those responding to the survey said they had increased the amount of space devoted to community and neighborhood news. Among smaller papers, this number was even higher at 67%.

In each of seven specific topic areas where editors said they had added reporting power over the past three years there was a strong local news component: local government and politics, education, the environment, police, sports, obituary writing and investigative reporting. Education was the biggest gainer, with 36% of newsroom executives saying that had added reporting power in this area. Lisa Walker, executive director of the Education Writers Association in Washington, DC, described today’s daily



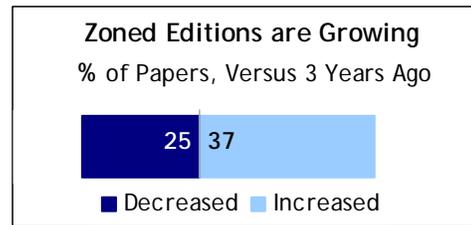
newspaper education beats as increasingly “very local”, with less emphasis on broader context and less coverage of national trends than was once the case.



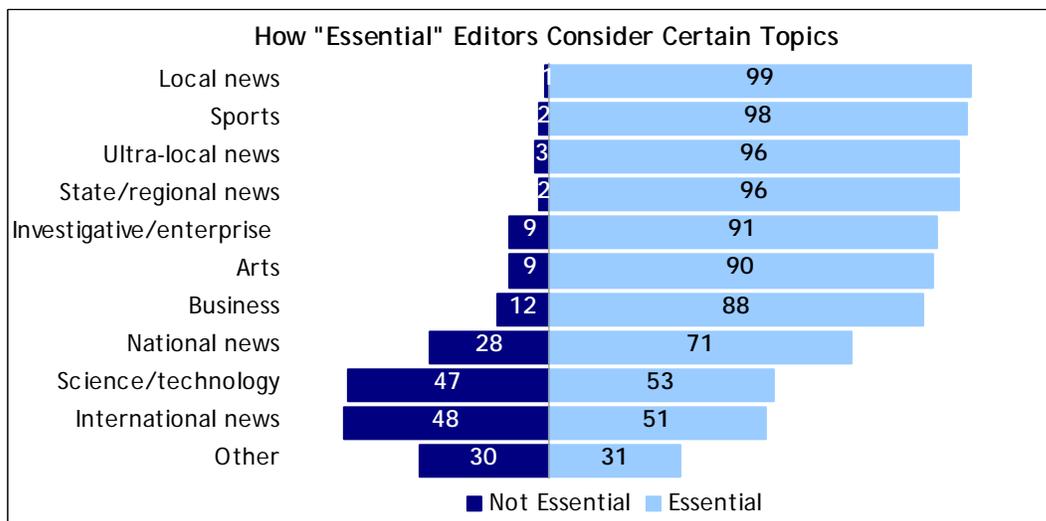
Staffing for coverage of sports, local government and politics, police and investigative reporting, all grew in 30% of the newsrooms surveyed. Although not specifically measured in the survey, anecdotal evidence suggests that at least some of these gains have been driven by pressure to provide web content during the course of the day. Some of this content is often then “reversed

published” back into the newspaper.

The focus on local news is also driving changes in zoned editions, those sections of the papers focused on specific communities or areas. Editions catering to the outer fringes of a paper’s circulation area are being closed as new ones are launched with content targeted for communities and neighborhoods within the core circulation



area. Nearly four in ten editors surveyed (37%) said they had increased the number of zoned or targeted neighborhood editions they produce, while 25% had reduced them. And the push toward local sections is even higher for smaller circulation papers (44% are increasing, versus 20% reducing them).



Investigative Teams—and Their Stories—Survive

One area that most editors insist they will not cut back on is investigative or watchdog work. Those who manage papers both small and large seem to believe this is an essential part of a paper's role, and one that fits with whatever their future business model will be.

In face-to-face interviews, editors from both larger and smaller papers invariably stressed their belief that strong investigative, explanatory, reporting remained at the core of daily newspaper journalism. This collective opinion was reinforced by the survey results, where 91% of all newsroom executives said they considered investigative or enterprise reporting either “very essential” or “somewhat essential” to the quality of their news product.

The survey data, however, suggest that larger papers are more committed to the watchdog role than smaller papers. Despite financial pressures and newsroom cuts elsewhere, half the editors from these papers said they had increased their investigative reporting staff over the past three year—twice the figure for smaller papers (24%). Over 90% of newsroom executives from larger papers considered investigative reporting “very essential” compared to just over half (52%) of their counterparts from smaller papers.

In interviews, several newsroom managers declared that their investigative reporting teams would be the last hit by newsroom downsizing. To be sure, they admitted that financial pressures today force them to be more selective in their choice of such labor-intensive editorial projects. They also noted investigative stories tend to run shorter than they did a few years ago and cost more to produce because of additional editing time required to package them for both print and web presentation. But there was evidence that advances in information technology, such as the ability to mine new electronic data bases, has enriched this genre and opened new doors for newspapers to explore important issues.

One editor of a large metropolitan daily contended this move toward smaller and stronger larger stories mirrored the trend of technology itself, where consumers are happy to watch a film on a two-inch iPhone or a 70-inch mega-screen, but find the 26-inch screen passé.

Together, these two developments—shorter news stories and richer enterprise—reflect part of a new, evolving role of the print newspaper in an era of growing online access to news virtually as it happens. In this environment, the role of the print edition of daily newspapers is becoming less a vehicle to convey news developments and more a source for analysis, texture and context to help readers better understand those developments.

Led by papers such as the New York Times (circulation: 1.1 million), editors in recent years have tended to place more analysis or enterprise stories tied to the news on the front page, while often placing the news story itself inside. The *Virginian Pilot* in

Norfolk, Virginia (circulation: 175,000) is a leader in page one experimentation. It has repeatedly published dramatic front pages that are closely tied to the day’s news, yet contain no story in conventional format. On Memorial Day this year, for example, the Pilot devoted its entire front page to an illustration of a local Vietnam War hero’s gravestone, his Medal of Honor citation, and a single paragraph of text noting the holiday that concluded with the exhortation: “Honor them.”

Story Length

Editors indicated they also had become more selective, not just in what stories to cover and how to cover them, but also on story length. A story marking an incremental development—say, on a running city hall squabble that might have warranted a 12 to 15-inch third-day story a few years ago—is part of a dying breed. Today, such developments are either judged unworthy of coverage at all or are covered by a beat reporter in a quick-hit couple of paragraphs that are posted on the website. Depending on the weight of news day, the story either dies there, or can be “reverse published” into the newspaper as a 6-inch short or a brief.

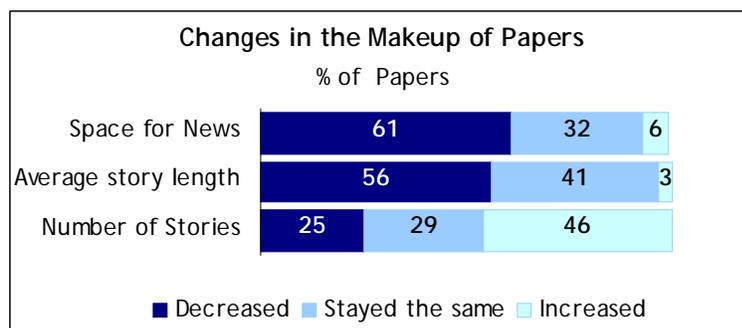
Secondary national or international developments given modest stand-alone treatment a few years ago, have suffered a similar fate. As a result, the quantity of briefs appearing in today’s daily newspapers has risen, but so too has the quality. They have become more than fillers.

“Cut the 15-inch story to 6 for the paper, let the reporter put the other nine in his (on-line) blog for a reader who wants more information and everybody wins,” summed up Mark Ziemann, editor of the Kansas City Star (circulation: 252,000) for over a decade before being named the paper’s president and publisher last March.

St. Petersburg Times Executive Editor and Vice President Neil Brown said he believed shorter story length is also the result of more disciplined editing. “We’re more rigorous in our editing now,” he said. “We recognize that some of those stories may have been marginal, or even filler. So the 25-inch story is down to 10, 12, or 6 inches.”

The Washington Post’s (circulation: 673,000) presidential election campaign coverage is an example of this trend. Summaries of campaign highlights are collected into a series of briefs and run under a distinct logo dubbed “The Trail.” The Trail also appears as a blog on the paper’s website, washingtonpost.com.

Related developments or themes that touched several primary campaigns were collected together and written into a single roundup rather than as a series of disconnected



stories. Post executive editor Leonard Downie, Jr., said that during the campaign four years ago, most of what today is covered as briefs or in single roundups would have run as separate, medium-length stories. He described the 2008 election coverage format as a prototype for presenting other news elsewhere in the paper.

Such approaches help explain why, at a time of shrinking newshole and newsroom staffs, a large majority (75%) of editors said their story counts—the number of stories appearing in the paper—had either increased or remained the same during the past three years. As a result, today’s readers receive a similar, or even greater, breadth of coverage in their daily paper than a few years ago, however much of it comes in more of a digest form.

Editors differed in their views of what has been lost in this condensation of stories. For some, it is important background, context, additional sourcing and interesting ancillary points that have gone—losses that significantly devalue the shorter story. Others, however, dismissed the lost material as, more often than not, either arcane detail written into the story by a reporter trying to impress his sources or padding to give the story the appearance of greater importance than it actually was. Either way, the content lost in the print version of the story doesn’t always disappear completely. Instead, much of it migrates to the web as beat reporters write these minor twists and turns of a running story either into their own blog or as short, stand-alone website stories.

In interviews, editors generally seemed accepting of the trade-off. “It’s part of what’s enabled us to have new forms of political coverage that convey more information than we’ve ever had before,” Downie said. “Stories are definitely shorter—unless they need to be longer, such as profiles.”

III. THE CHANGING NEWSROOM

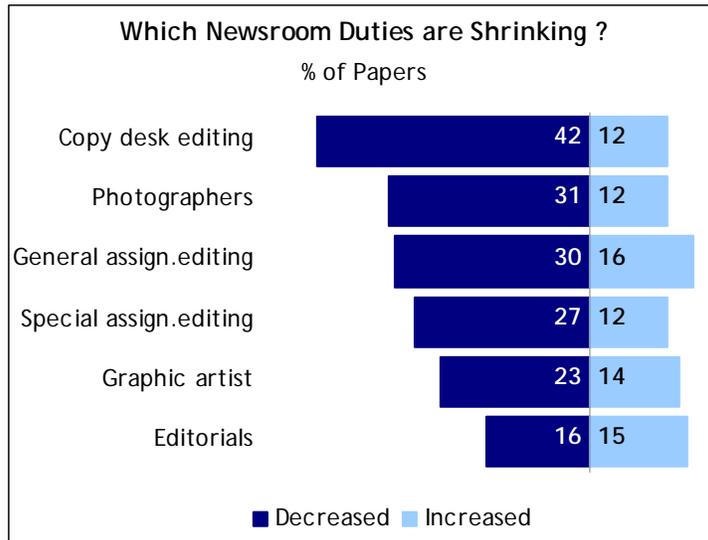
As newsroom staffs decline in numbers and the content they produce changes, the skills—indeed, the very culture—of the newspaper newsroom is undergoing its own transformation. Although less visible, the implications of this change are every bit as important as other shifts now underway. In the churn of cutbacks and the arrival of new hires, some skills are in decline as veterans depart, while, at the same time, fresh, young blood brings in new skill sets and aptitudes.

What is disappearing?

At the top of the list, the ranks of editors who check stories prior to publication are thinning. Four out of ten newspapers (42%) reported that they have reduced the number of copy editors in the last three years, while just 12% have increased. And the pressure is even worse at larger papers. There, fully 67% say they have cut back on copy editors, versus just 2% that report increases.

Similarly, about twice the number of papers reported decreasing their ranks of general editors than said they had increased (30% v. 16%). The same was true for

specialized editors (27% vs. 12%), and graphic artists, (23% report cutting back vs. 14% increasing).



Another diminishing skill set, interestingly, is photographers. Overall, 31% of newspapers say they have cut back on photographers in the last three years, vs. 12% that had made net increases. At the biggest papers, this trend is more pronounced, with the majority reporting cutbacks on photographers (52%) and just 6% saying they had made net additions.

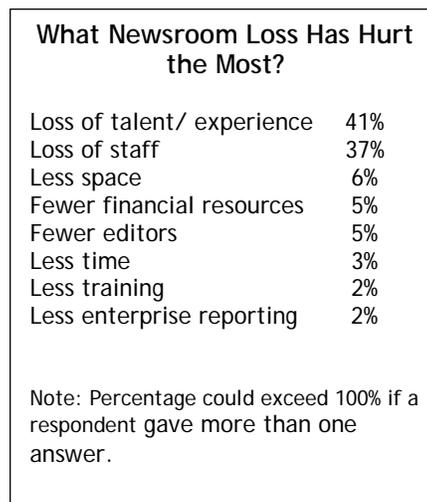
Loss of Experience, Loss of Talent

Yet, the loss lamented most by newsroom executives is one far harder to quantify—the draining away of institutional memory—as older, and often more expensive, journalists are encouraged to leave through structured buyouts.

In interviews, editors said those leaving generally are among the most experienced and the most talented. As many of these veteran reporters go, they take with them the knowledge of their beat and their community, a deep loyalty to core journalistic values, and expertise so important to understanding stories. When an experienced editor leaves, the editing process weakens—and with it, a degree of the paper’s collective wisdom and judgment.

While such renewal has always been a natural process, it can pose dangers to an institution undergoing such accelerated change. This is especially true for an institution whose role includes that of being a knowledgeable, authoritative voice for the community.

In survey responses, the loss of talent and experience was ranked as the number one concern when editors were asked to volunteer what has hurt their newsrooms the most. Fully 41% of editors surveyed offered comments that fell into this category. That was closely followed by the more general loss of staff overall (37%). Next, as a distant third, came less space (6%).



“When you have to let go someone who has been in a job for 5, 10 or 20 years, you lose something that cannot be recouped by the people who are left behind in the newsroom,” commented one editor, who counted the passing of institutional knowledge as the newsroom’s biggest loss.

Occasionally, the sheer pace of change sweeping through the industry has taken a toll in confidence levels and such fundamentals as the clarity about the role of the journalist.

When asked to cite the newsroom loss that hurt the most, one editor answered simply, “The concept of who and what we are.”

Added another, there is a “loss of stability—none in this business can predict with confidence where change is taking us.”

The bottom line culturally is this: In today’s newspapers, stories tend to be gathered faster and under greater pressure by a smaller, less experienced staff of reporters, then are passed more quickly through fewer, less experienced, editing hands on their way to publication. Some editors—but far from a majority of those interviewed—said they could see the costs.

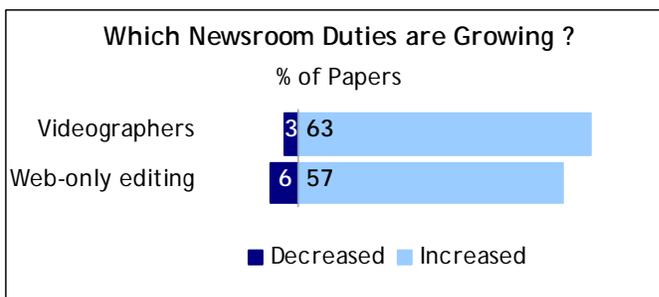
“I read the stories (in my own paper) today and I see more holes, questions I want answered that are not,” lamented the editor of a large metropolitan newspaper. “I see more stories...that aren’t as well sourced as I’d prefer.”

What Skills Are Being Gained

The loss of institutional memory, and the erosion of the ranks of skilled editors and photographers, is part of a generational shift toward a more modern newsroom with more versatile, more tech-savvy reporters armed with new skills, higher production rates and an ability to multi-task.

Exactly what are these new skills?

By far the sharpest newsroom increases recorded in our survey were for the two web-related jobs measured: videographers and web-only editors. Fully 63% of editors



surveyed had increased the amount of “editorial power” in videography. Another 57% said they had increased the resources devoted to “web-only editing.” And in hiring new staff, 90% of editors surveyed said they considered multi-media skills “very” or “somewhat essential” for the job.

Today, reporters who once carried with them little more than a pencil, a notebook and their newspaper's first edition deadline time, are taking on new responsibilities at a dizzying pace. Anders Gyllenhaal, Executive Editor of the Miami Herald (circulation: 240,000) listed six distinct venues for which Herald newsroom staffers were expected to provide content: the print newspaper, the paper's website (miamiherald.com), an entertainment/leisure time site launched recently by the paper (miami.com), the local PBS station for which the Herald provides news content, a web-linked television operation owned by the paper and the Herald's instant news service, packages of brief news stories sent to Internet subscribers during the course of the day.

These tasks, together with new blood and the competitive juices stoked by a faster pace and constant deadline pressure, appear to have re-focused newsrooms. Asked to cite the newsroom change that most contributed to their ability to be competitive, editors used words like "urgency," "excitement," and "new enthusiasm" in describing a newly energized staff.

"New young reporters and editors who bring new skills and outlooks to those who have been here a long time," responded one editor.

"(The) change in mindset and culture on the part of reporters and editors," added another. "Our staff has a keen understanding of the need to out-report and out-hustle our competitors."

Almost without exception, these gains are tied to the place where America's newspapers, amid wrenching cutbacks, are trying to build anew: the Worldwide Web.

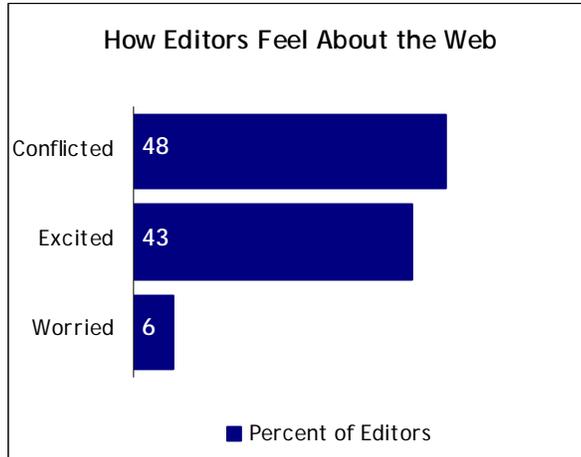
IV. THE INFLUENCE OF THE WEB

Together with the impact of steadily increasing financial pressures, the growing influence of the web is the second major factor driving the change of newsroom culture. News people are stretched to the limit trying to feed the seemingly insatiable appetite of the web for content—immediately. The enormity of its impact on the industry—both real and potential—is hard to overestimate.

The web has opened new vistas for daily newspapers, enabling them to offer video content that competes directly with television. It provides newsrooms the ability to establish a genuine two-way conversation with readers in a newspaper's own community while at the same time extend the reach of the paper's circulation to anyone with an Internet connection, whether they are in Hong Kong, Helsinki or Hoboken. Today's savvy news junkies know that if a big news story breaks, it's a good bet the website of the nearest newspaper will have timely, exclusive content. The Internet has also helped facilitate collaborative efforts such as that between the St. Petersburg Times and the Congressional Quarterly's CQ Weekly to produce the "PolitiFact" feature.

Although several editors voiced concerns about the web as a distraction that deflects resources from the print edition, overall, the view of the web appears to be increasingly positive.

Editor's responses indicated, often with a sense of surprise, that the growth of newspaper websites has also had a positive impact on the content of the newspaper itself. Interviews and survey results strongly indicated that—contrary to early conventional wisdom—the print and website versions of today's daily newspapers *can* be complementary and mutually strengthening.



In interviews, for example, newsroom executives said their website readers want strong visuals, concisely-packaged information and easy navigation—all preferences that have begun to influence the presentation of print newspapers as they work to lure an Internet-savvy generation of potential readers to a more user-friendly experience. As a result, many newspapers today emphasize visuals, including improved graphics, more white space and better sign-posting.

Increasingly, the web today is seen as a newspaper's ally, not an adversary. Because of this, it is helping counter sagging morale as newsrooms shrink. At larger papers, where staff cuts have been deepest and the newsroom moods darkest, fully 57% of those surveyed say "web technology offers the potential for greater-than-ever journalism and will be the savior of what we once thought of as newspaper newsrooms." By contrast, just 4% expressed worry that the web's pressure on immediacy might undermine the accuracy and values of journalism.

The optimism also exists at smaller papers, but not as strongly. Only 40% agree with the "savior" description. Industry-wide, nearly half of all editors responding (48%) admitted they were conflicted about the web's impact.

Whatever their feelings, there is no doubt that the web has been accepted as a fact of newsroom life. Today, editors said they no longer ask reporters if they have time to file for the web before embarking on their story for the print edition. Filing first for the web is a given. Editors also noted that exclusive material is no longer kept off the web as it was just a few years ago to protect the print edition impact. Today, it is posted immediately.

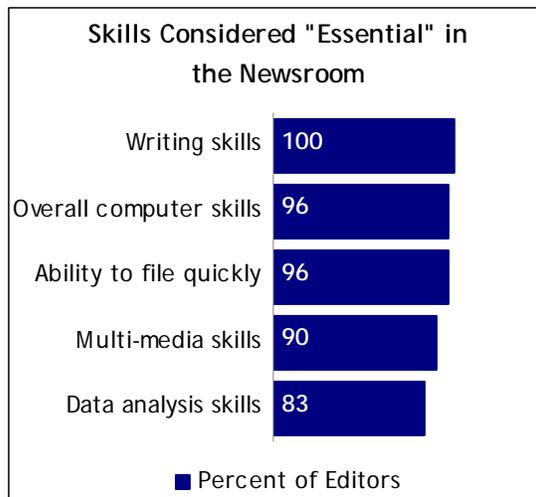
To meet new challenges, some newsrooms have completely reorganized to provide a variety of written and visual content more efficiently to both the website and the paper.

“Newsrooms have traditionally been built around sections of the paper (and this) led to newspaper-centric thinking, production-oriented thinking,” said Charlotte Hall, editor of the Orlando Sentinel and 2008-2009 president of the American Society of Newspaper Editors. As part of the revamp, the Sentinel (circulation: 228,000) eliminated traditional newsroom departments, scrapped the Metro and Features desks, and “flattened” the newsroom accountability structure by eliminating editing layers. The reorganization also cut more editing than reporting positions and reformed journalists into flexible teams of “news gatherers,” equally responsible for providing content to the web and the print editions of the paper. All were encouraged to be “web-first” thinkers on breaking news and visuals.

“We were very newspaper-production driven and I wanted to see ourselves in the new world as driven by news gathering across platforms,” she explained. “We needed to be a much more multi-media newsroom.”

The Data Challenge

Learning to use new technological tools to capture and present newsworthy data to readers in interesting, relevant ways is viewed by editors as a major challenge for American newspaper newsrooms over the coming decade. Some viewed data presentation as the next great frontier of the information age, one newsrooms needed to dominate to retain their role as the premier sources of news and information in the years ahead.



“We must have this franchise because so many others are after it,” said Janet Coats, Executive Editor of the Tampa Tribune (circulation: 221,000). “If we lose this, I really worry about our relevance.”

Some newsrooms have specifically targeted this area for development.

Orlando Sentinel editor Charlotte Hall called the creation of a data team the “single most significant innovation” to come out of the paper’s 2007 reorganization in terms of generating new reporting skills for

both the web and print versions of the paper. The team brought together everyone at the paper responsible for gathering data for listings, then melded them with library researchers and archivists, a reporter trained in computer-assisted reporting (CAR) plus an editor who had been a high-level database researcher. Their job, she said, is to mine data, then work with other teams across the paper to develop stories based on that data. Initial results have included front page enterprise stories on local restaurants and housing foreclosures.

For the restaurant project, which brought a business reporter and the restaurant critic into the team, the paper put together a database of local restaurant health inspections, then produced a Sunday front page story under the headline, “How Safe Is Your Restaurant?” It told readers that 30-40% of Orlando’s licensed eating establishments had been cited for serious health violations, including some of the area’s most exclusive dining locations. Findings, broken down by neighborhood, were posted on paper’s website, as was the entire database from which the story was written. Driven largely by the Sunday front page treatment in the newspaper, the on-line database drew over a quarter of a million page views during the first few days, Hall said.

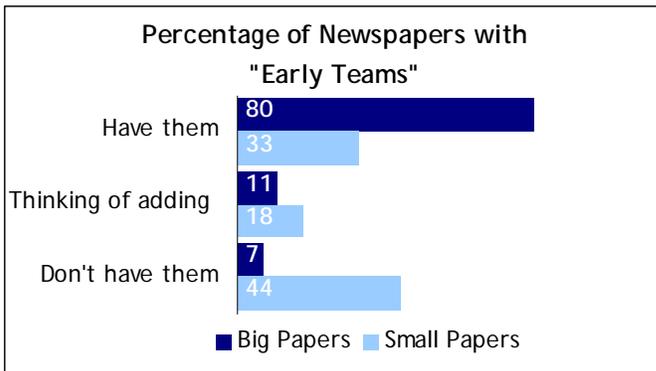
Working with data on housing foreclosures, the team produced a two-day front page package that mapped foreclosures in the Orlando region. The on-line version of the story allowed readers to zoom in by zip code or street name using an interactive map.

Other databases produce lighter fare but still draw large reader interest. The Milwaukee Journal Sentinel (circulation: 217,000) created a database of all 442 touchdown passes thrown by Green Bay Packer quarterback Brett Favre, enabling readers to determine, for example, how many of them came at home and how many away, how many were over 20 yards in length or came in the 3rd quarter when the temperature was below freezing.

Early Teams and the Return of Newspapers to the Field of Breaking News

Among its many achievements, the web has restored the time competitiveness of daily newspaper newsrooms, an edge eroded first with the advent of radio nearly a

century ago, then effectively erased in the 1960s as network television news became a major force.



One sign of this new competitiveness is the advent of newspaper “early teams”, groups of journalists usually comprised of an editor and a few reporters, who begin anytime around dawn or before and work through the early

afternoon, reporting and writing content exclusively for the website. In many respects, these early teams represent a kind of resurrection of the old afternoon newspaper: starting early to package today’s news today—or, more precisely, packaging this morning’s news this morning.

Early teams are part of a broader repositioning of newsrooms for a 24-hour news cycle capable of feeding the web constantly. More than four of every ten (42%) papers surveyed have already added early teams and another 17% are planning to add them. Among larger papers, a remarkable 80% already employ such teams. Although not

measured specifically in the survey, anecdotal evidence and interview comments suggest that staffing of these early teams is an important component for those who say their newsroom staff has increased.

Much of the material produced by these early teams is routine—traffic tie-ups or pile-ups, police matters, late night local government meetings or sports results, fires and court appearances. Because of this, early team stories tend to have a short shelf life and are often overtaken by other, more significant news during the day. Occasionally however, they are strong enough to update and rewrite for the following morning's newspaper.

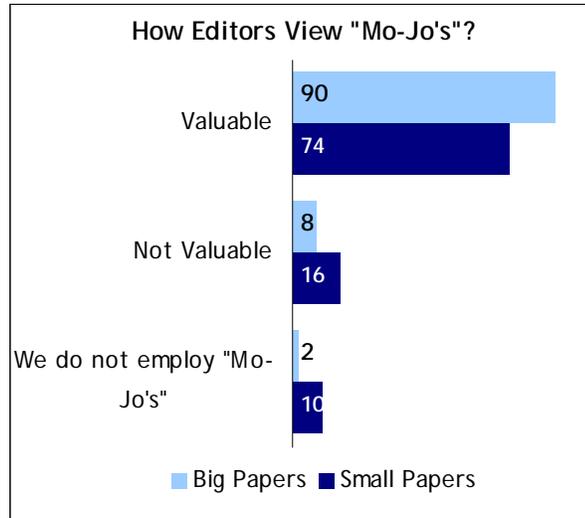
Working from website traffic data, more newsrooms now target de facto deadlines to make sure fresh content is up for periods when traffic spikes, including 6-7am (as people wake up), 8:30-9am (as they get to work), around 11:30am (before they go to lunch) and around 2pm (when they return from lunch). The editor of one large metropolitan daily spoke of "website edition times."

The creation of early teams has changed the role newspapers now play in covering and providing news to their community. Miami Herald newsroom executives say local television news teams frequently find themselves sourcing the Herald's website, MiamiHerald.com, when reporting new developments on a breaking story. The reason: the paper can deploy more reporters onto the story than the smaller TV newsrooms competing for the same story. And as a new generation of newspaper reporters is trained and equipped to shoot and post video when deployed onto a breaking story, newspapers suddenly have the capability to post dramatic footage online immediately. Even if television newsrooms can match the newspaper staff's footage, TV news directors are often left with just two choices. They either wait for their own regularly scheduled newscasts, a decision that means allowing themselves be scooped by the newspaper's website site, or they post the footage immediately on their own site, a move that means scooping their own next scheduled newscast. Occasionally, there is no choice. When a Kansas City Star staffer captured a brawl on video that broke out during a late evening meeting of county legislators, local television stations—which rarely staff such events—turned to the Star for their footage.

The web's arrival as a major force also has effectively redefined the universe within which daily newspapers operate. When asked about competitors, Washington Post editor Downie answered, "Any news organization with a website." One example: in the early hours following the November, 2007, slaying of professional football star Sean Taylor, the Miami Herald broke developments on the case because the shooting occurred in Miami where the paper was well-sourced with the police and emergency response teams. However, once the focus of the story shifted to the question of Taylor's survival, the Washington Post, one thousand miles north, took the lead because new information was coming from the family via executives of Taylor's team, the Washington Redskins.

The Advent of the “Mo Jo”

Demands for content and quick website postings have also given birth at many newspapers to the mobile journalist—dubbed “Mo Jo’s.” More than three-quarters (78%) of those editors in newsrooms where reporters had been trained to shoot and file video footage from a remote location said they found “Mo Jo’s” contributed either “some” or “a great deal” of value to the news product. Among editors of larger newspapers, the positive response was even higher at 90%. This figure is possibly linked to the disproportionate investment by larger papers in “early teams,” whose members often work in a similar manner.

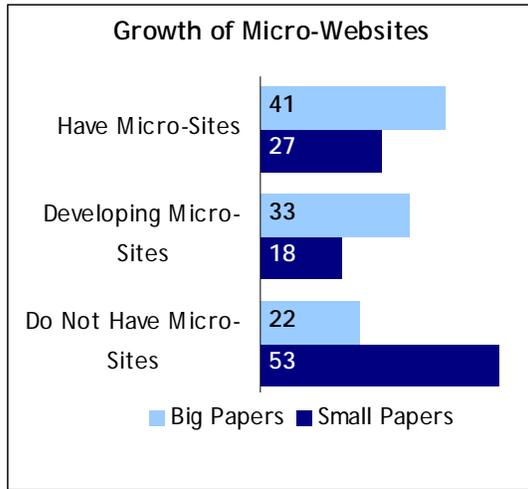


Anecdotal evidence suggests “Mo Jo’s” are usually deployed to cover geographical rather than themed beats and tend to act as carpet sweepers, reporting and filing a stream of short, quick stories for the paper’s website on minor or routine developments during the course of the day. The true “Mo Jo” rarely appears in the newsroom, is equipped with a cell phone, laptop, digital and video cameras along with the means to file content directly to the website. When a larger story breaks, the “Mo Jo” files repeated updates for the website, and may then be asked to write a longer story for the following day’s print edition. Interviews and survey results indicated a division of opinion on the value of such reporters. The News-Press in Fort Myers, Florida, judged an initial experiment was so productive that all the paper’s reporters have since been converted into “Mo Jo’s” with considerable success, according to editors there. At the other extreme, the editor of a large circulation paper dismissed the entire concept as “some kind of cartoon character.” Some newsroom managers said they wanted to deploy more “Mo Jo’s” but had failed to get management approval to finance the necessary training and equipment.

Micro-Sites

Another change afforded by technology is the ability to target specific audiences with specific content. Much effort is aimed at shaping content for a range of very narrow, specifically tailored interests—giving readers news of *their* community, *their* favorite sport or *their* preferred leisure time activity. It provides the ability to create what one executive called “The Daily Me.” Often this is reflected in so-called mini or micro sites built as distinct pages within a paper’s main online website. They can be tailored to events in specific communities or neighborhoods or to other narrowly focused interests.

One in three papers surveyed report they already have micro-sites and say they are planning to add more, while another 21% say they are developing them. As in other areas of web development, data suggest larger papers have moved more quickly to develop micro-sites than their smaller counterparts.



Arrival of the Staff-written Blog

Newspapers have also used the web to assimilate ideas from new media that a few years ago might have been considered heretical. Probably the most common of these is the rise of the staff-written blog—a space

on the paper’s website where a member of the newspaper’s staff posts comments and other information usually related to his or her beat and engages readers in a free-wheeling electronic conversation. After beginning as a feature of citizen journalism, the blog—the word is short for Web Log—has quickly become a highly successful feature of mainstream institutional journalism. The blog’s more relaxed, informal format, coupled with the ability of readers to respond quickly to a staffer’s blog entries, have accelerated and broadened the flow of information and reduced the distance between the newspaper and its readers.

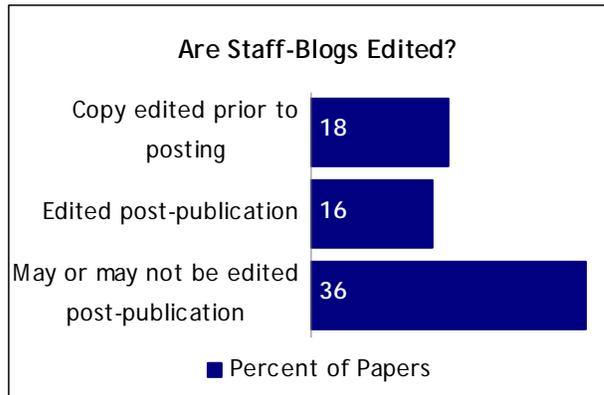
Fully 70% of the newspapers participating in the survey run staff-written blogs on their websites, with nearly one-third of those papers now publishing 10 or more. And, interviews with senior newsroom managers suggest the genre is likely to grow further in the future. More than a quarter of those from newspapers with 100,000-plus circulations said they hosted 30 or more staff blogs.

Number of Staff-Blogs	Big Papers	Small Papers
	%	%
40 or More	13	0
30-39	13	0
20-29	19	3
10-19	31	11
1-9	22	48
None	0	37

Despite—or perhaps because of—their proliferation, these blogs are not getting nearly the kind of supervision or editing of the rest of the newspaper. Over half of all editors and two-thirds of those editing larger papers, said that these blogs were only edited after publication, if at all.

Many of these blogs focus on sports or specialty beats such as crime or education. Although primarily written for the web, several editors said blog content is now frequently republished into print editions. In an example of the complementary relationship of daily newspaper web and print content, Ft. Lauderdale Sun-Sentinel

managing editor Rosenhouse said that web traffic on one blog jumped dramatically after it was promoted in the print edition.



Blogs have also extended a paper’s reach, creating global communities of conversation.

After a web producer at the Orlando Sentinel began writing a blog for the paper’s website about his free time passion of soccer, newsroom managers were curious to see spikes in traffic to the blog at unusual times, including the pre-dawn hours. It

became apparent the blog was being read worldwide, with the pre-dawn jump in traffic most likely driven by Europeans curious about new developments in the soccer world as they got started during their morning. The newspaper, which has not covered soccer as a beat, now republishes portions of the blog in its Sunday print editions.

In another example, when a Milwaukee Journal Sentinel sports section blogger threw out a question asking readers how they became Green Bay Packer fans, the result was an avalanche of responses from just about every corner of the globe, according to Online Editor Michael Davis.

How Merged Is the New Merged Newsroom?

Blogs, Mo Jos, Micro-Sites, Early Teams, and more, are evidence of an important change underway in newsrooms across the country, one in which a growing number of publishers and editors, having concluded the era of print newspaper domination has ended, now believe the future of their newsroom depends on how well they can do two things:

- (1) Establish themselves as strong, relevant web content providers for a generation of online news consumers; and
- (2) Maintain relevant, compelling content for the newspaper’s print edition that remains the industry’s primary, albeit diminished, cash cow.

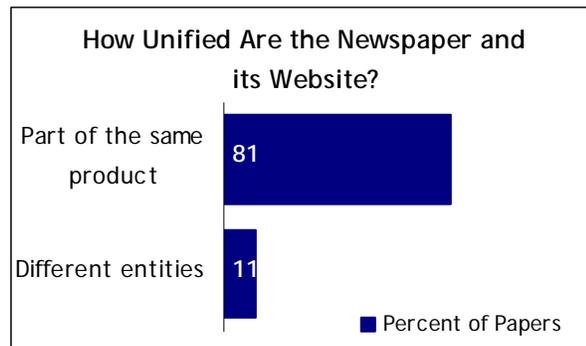
This shift of focus towards the web is accelerating at an enormous pace, driven by an alarming plunge of print edition advertising revenues, sagging stock prices and rising web traffic statistics.

Orlando Sentinel editor and ASNE president Hall talks of “huge strides” in digital journalism made during the second half of 2007 and the first half of 2008, both in her own newsroom and at many others.

“In the last year, we have made a great leap forward in Web journalism—in our fluency, the integration of our workflow and our newsroom culture,” she said. As evidence she pointed to a 57% jump in page views at OrlandoSentinel.com in June, 2008, compared to the same month last year.

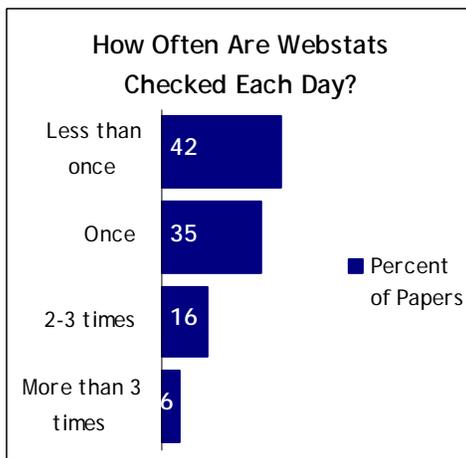
This new focus is predicated on an act of faith—that somewhere, a key exists that can unlock the secret to monetizing web content. At most larger papers, the repositioning is already well under way. Interviews and survey responses indicated that, in a growing number of newsrooms, the website editor now has the role of a deputy managing editor—a kind of super department head, who often reports directly to the editor.

Four out of five editors (81%) today view their organization’s website and its newspaper as a single integrated product tailored to different formats, survey results showed. But accomplishing that may be easier said than done. Most editors (63%) say they still focus more of their time on the newspaper than the website. Just three in ten say the focus of senior newsroom executives was now equally divided between the two.



And most editors do not appear to be poring over traffic data from the web on a continual basis. A plurality, 42%, said they look at the data less than once a day. Just over a third (35%) look once a day. Only 22% look more often than once a day.

Although editors at times seemed wary of the web, they were simultaneously coming to realize the potential benefit, sometimes showing a sense of surprise at discovering that print and website can indeed reinforce each other.



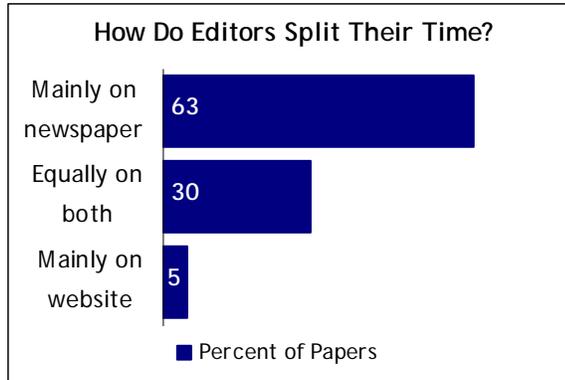
In interviews, there were unmistakable signs that the growing demands of the web on newsrooms at times sapped attention and energy from the print edition and the conventional reporting and story telling that is focused there.

“The demands of producing more web content are diminishing the print product,” complained one editor. Still, there are strong indicators that editors are beginning to see the web’s advantages and warm to its potential.

Print editions can also take advantage of the web’s saturation coverage during the early hours of a major news development to move beyond the straight news leads even on

their first cycle. In such instances, today’s print edition dailies fulfill a role similar to that of the afternoon paper in an early era when a news break occurred in time for the morning papers to catch the basic details but none of the color, context or analysis.

After an early morning gas explosion ripped through a factory in Milwaukee two years ago, newsroom staffers at the Journal Sentinel used the paper’s website to post eyewitness accounts and official statements, along with photos, video and audio content throughout the day. Meanwhile, editors assigned a reporter to focus solely on writing a narrative that would lead the next day’s paper. The result: the paper led its first print edition after the explosion with a compelling, anecdote-rich narrative, heavy with texture, mood, and the drama of the moment. The story was unencumbered by much of the factual detail available for many hours on the newspaper’s website and in other media. Street sales of the print edition the following morning were up strongly, said Journal Sentinel Editor and Senior Vice President Martin Kaiser.



The newsroom of the Arizona Republic (circulation: 413,000) deployed in a similar manner last August after two media traffic-watch helicopters collided in mid-air over Phoenix and crashed as they were tracking a lunchtime police car chase through the city. Instead of a standard wire-service lead the following morning, the Republic also led its print edition with a narrative drawn in part from the transcripts of transmissions between the two helicopter pilots. Editor and Vice-President/News Randy Lovely said what surprised him most about that day was that the early intense reporting and writing for the paper’s website had actually accelerated rather than slowed preparation for the print edition.

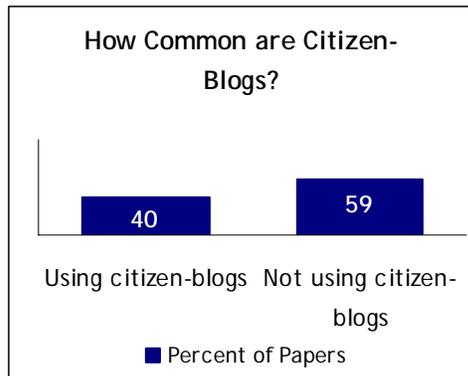
“We literally had our front page nailed down and were fine tuning two hours before deadline,” he said.

In a sharp departure from the traditional daily newspaper story placement, two days following the April, 2007, Virginia Tech campus shootings that claimed 32 lives, the Norfolk-based Virginian Pilot published a simple, stark front page, listing the names and ages of the victims in enlarged typeface along with references to individual profiles on inside pages, all under a commemorative looped ribbon in the school’s colors. The effort won applause from readers.

V. CITIZEN IN THE NEWSROOM

The web is catalyzing another revolution in America's newspaper newsrooms: readers have become active participants in producing the news.

Even in what is arguably the most traditional venue for journalism, the daily newspaper, readers now provide stories and photographs for publication. Four in ten newspapers said they host citizen-written blogs. The Kansas City Star, for example, hosts a blog called Mom2Mom where mothers can chat among themselves, then once a week poses a question asking how to deal with a specific issues. The responses appear in the paper's print editions.



But the readers of America's daily newspapers today interact with newsrooms on several other fronts, too. They offer tips and leads on fast-breaking news developments and have been invited to act as sources for investigative stories.

Still, survey results indicate editors don't seem to see citizen journalism as the silver bullet some predicted a decade ago—a source of content that could one day replace reporters. While a quarter of editors describe it as valuable, nearly six out of ten describe it in more qualified terms as only "somewhat" valuable.

In another question, a plurality of editors (46%) believes citizen-produced content is "an essential ingredient for the website and newspaper of the future (...)." But nearly as many of those responding (42%), expressed reservations, agreeing with the statement describing citizen journalism as "an interesting, but limited concept in which citizen input is kept to very small stories or to basic informational material (...)." Only a quarter of the survey respondents described citizen content as "very valuable."

In interviews, a majority of editors, both at larger and smaller papers, tended to share the more cautious assessment, casting initial expectations as inflated and siding with those survey respondents who saw its role as interesting, but limited. Several complained that getting acceptable written content—e.g. stories—from citizen journalists usually required significant investments of newsroom staff time to train, coach, educate, confirm and edit.

"It's not the answer," said Miami Herald executive editor Gyllenhaal. "The idea that all you must do is open the gates and copy flows in is not right. Like anything good, it takes work, a lot of time and a lot of thought."

Still, some newsrooms—especially those serving smaller circulation markets with well-educated populations and a developed sense of community— have had highly rewarding experiences with other forms of citizen participation.

The editor of one large metropolitan newspaper said his reporters had details of a major highway pile-up, including the names of victims, several hours before the same information was released by police merely by posting a reporter's email address and phone number on its website along with an invitation for anyone involved in or around the accident to make contact. However, the editor stressed that all information received from the public was first confirmed by a newsroom staffer before it was posted and the names of victims were held back until authorities had notified families.

Photos

In interviews, editors invariably said the easiest, most successful form of user-generated content has been weather-related photographs, which have the perfect mix for a citizen's contribution: they require little expertise, attract broad interest, their content is easily verifiable and they tend to be non-controversial. Weather photos also seem to generate a timely and strong citizen response. Gannett vice-president Kate Marymont discovered this last year during her tenure as executive editor of the News-Press in Fort Myers, Florida (circulation: 92,000) after a tornado touched down in the Cape Coral region of the paper's circulation area.

"We got hundreds of photos," she said. "A year ago we'd have asked readers for photos, but now we don't have to ask. They just send them. It's not that we've gotten wise, it's just the way the world is behaving. People are more interactive."

Crowd Sourcing

Under Marymont's leadership, the News-Press operated at the experimental cutting edge in several areas, including its use of citizen journalism. While many newspapers have reached out to readers for tips on a fast-breaking news story where the public is involved, the News-Press has used crowd sourcing effectively in developing showcase investigative stories.

When, in July, 2006, the News-Press began investigating reasons behind a sharp jump in property owner assessments for new sewage and potable water lines being installed in the Cape Coral area, it issued a three-word invitation to readers, "Help us investigate." It then followed with a four-word question, "What do you know?" Marymont said the reaction was immediate. Within the first 12 hours, the paper received 68 responses from residents, who shared personal stories, steered reporters to documents they had not known existed, "and loaded us with questions to ask."

Within 24 hours, the paper was quietly offered an audit of the project that the city had ordered but never released. When the News-Press published the audit, work on the project was halted and only resumed after a reduction of property-owner assessments. The paper used similar tactics during an investigation of major discrepancies in the amounts victims of four 2004 hurricanes were reimbursed for roof damage by the Federal Emergency Management Agency.

Editors say the success of such efforts depends largely on the degree of public motivation.

“You’ve got to find the (public’s) ‘passion point’ and that usually means a pocketbook issue,” said Arizona Republic editor Lovely. “That’s what worked in Cape Coral. People were angry and just needed an outlet.”

The News-Press has also experimented with another dimension of crowd sourcing. It called for volunteers to help with stories, then installed 20 of them—all local citizens—as de-facto technical advisors to the paper. The group, called “Team Watchdog,” included a retired police chief, an accountant, a retired military officer and a former state Supreme Court clerk. Volunteers work closely with reporters, helping them study databases, decipher public records or delve into specialty subjects. They were also formally introduced to the newsroom staff, given classes in ethics and research techniques. Team Watchdog members carry a News-Press ID card identifying them as members of a citizen journalist panel that works with the News-Press and its website, news-press.com. The implicit endorsement of the paper conveyed by such an ID raised concerns on the part of some at the paper, but so far, no significant problems had stemmed from this, Marymont said.

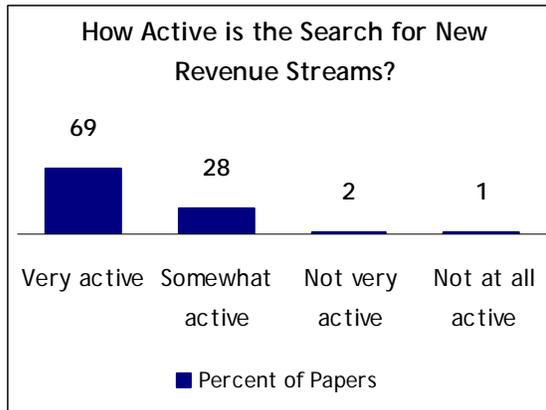
The Lawrence (Kansas) Journal-World (circulation: 19,000) has approached citizen journalism in another way. Working together with the University of Kansas School of Journalism and Mass communication, it first offers a five-week evening course at a ‘Citizen Journalism Academy’ to groups of about 25 volunteers interested in learning more about the journalistic process. Then, after completing the course, it offers participants the opportunity to write for the paper, the website, or submit photos.

“There’s (been) no obligation to do anything, but there are opportunities if they want to try them,” said the paper’s Special Projects director Ralph Gage. Beginning this fall, however, Gage said the paper would alter its approach, seeking out citizens with specific areas of expertise in the expectation that, after completing the course, they would assist the paper in its coverage.

VI. THE FUTURE

In part, this report is a portrait of how those papers are pushing the boundaries of innovation at a pace unthinkable a decade ago. At the same time, however, it documents the crippling impact of cutbacks triggered by the erosion of once-solid financial fundamentals. As we noted in introducing our findings, these two contradictory forces have effectively placed newspapers in a race—a race between innovating and cutting back. How quickly can newspapers invent a new journalism online, build an audience and find a way to monetize the product? And in the time it takes to do this, how much will further staff losses, and the accompanying loss of institutional memory and community knowledge, undermine their biggest competitive asset—the size and strength of their newsrooms? How much will they have to cut back on key subject matter? Will

audiences drift away because their old economic model is shrinking more quickly than



their new one is growing? Or will the investment in new technologies generate the income needed to sustain staffs large enough to produce outstanding journalism? Winning this race, editors sense, involves innovating quickly—on both business and editorial sides of the paper—with one hand and fighting off excessive cut backs with the other.

The \$64,000 Question: How to Monetize the Web?

In interviews, many were optimistic. Some, for example, argued the ability of technology to track readership of specific stories has given editors a powerful weapon in future financial battles, for the first time making an indisputable link between strong editorial content and the kind of higher readership that attracts advertisers. Now, editors stress, their colleagues must use this connection in financial battles.

“Too many editors are great with anecdotal stories but they don’t really measure what’s working and what’s not,” said Kansas City Star’s Zieman, who earned an MBA last year while still editor specifically to arm himself for the financial battles to come. “If you don’t know the numbers you won’t be invited to the table where these decisions are made.”

Convincing newspaper advertising sales staff to become more active in selling to the web is also viewed as an essential, overdue step, even if it’s not easy. Roughly 90% of advertising sales remain with the print media. In interviews, newsroom executives complained that advertising departments traditionally have been far more resistant than their editorial counterparts to the changes brought by the Internet Age. Understandably, there is less incentive to go after a pot containing 10% of the revenues than to go after one with 90%. But some editors warn that if advertising staffs don’t shift their focus now, they could end up with nothing in a matter of years because there would be no print edition left.

Still, there are signs of progress, at least anecdotally. The Journal-World, for example, has developed a software called Marketplace for potential advertisers that blends the format of electronic yellow page-type directories with strong, local community knowledge, offering local companies the ability to post commercials, profiles and other information, including store hours and photos, and coupons. In its first six months, developers claimed a single ad salesperson in a relatively small market brought in nearly one-half million annualized dollars, mainly from advertisers who had not previously done business with the paper.

The trick, said Dan C. Simons, Electronics Division president of The World Company, publisher of the Journal-World, was the neighborhood focus of the advertising.

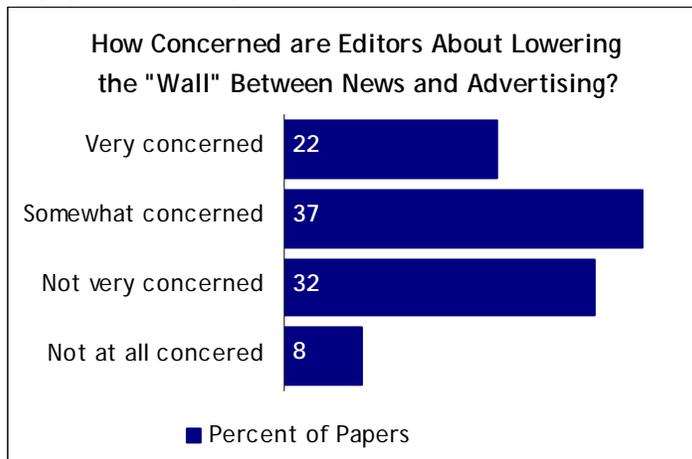
“If we can make \$450,000 in six months, Chicago can make \$20 million. It’s completely scalable,” said Simons. Programmers are currently working on a point of sale inventory, enabling a potential customer to check online if their local store has a specific product in stock.

Lowering the Wall

One implication of running in this race, editors told us, is that the once-formidable wall that divided the news and business sides of the newspaper has been substantially lowered. While that may not mean business people are roaming the newsroom influencing the product, there is evidence it *does* mean that the news people are busy trying to imagine new ways of making money.

Fully 97% of editors responding to the survey said they were active, at least to some degree, in the search to develop new revenue streams. One editor noted how his paper had offered a premier investigative package for sale on Amazon.com.

At papers both large and small, this has included launching tabloid sections aimed at

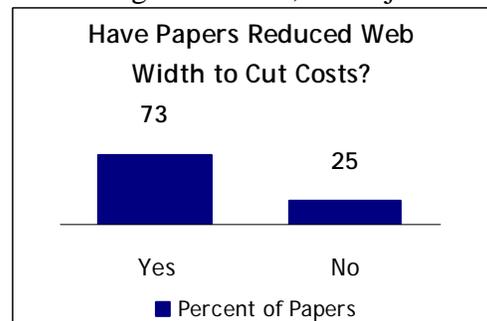


specialized audiences. Over half those surveyed (55%) said they had launched new tabloid products, usually narrowly targeted to youth, minorities or other specific demographic groups. Just over four in ten (42%) said they had re-launched existing broadsheet sections or editions in tabloid format.

Is this lowering of the wall bothering editors? Less

than some might have imagined. Among larger newspapers – e.g., those under greater financial strain—a majority of editors surveyed (57%) said they were either “not very concerned” or “not at all concerned” about lowering this wall in search of new revenues, while just 41% expressed worry. At smaller papers, the level of concern is higher. Fully 63% of editors surveyed were concerned about the lowering of the wall, while just 35% said they were not overly worried.

In interviews, several editors said they encouraged discussions between the two departments to a degree they had not done previously, with one admitting, “I never thought ten years ago that I’d be suggesting some of the things that I have.”



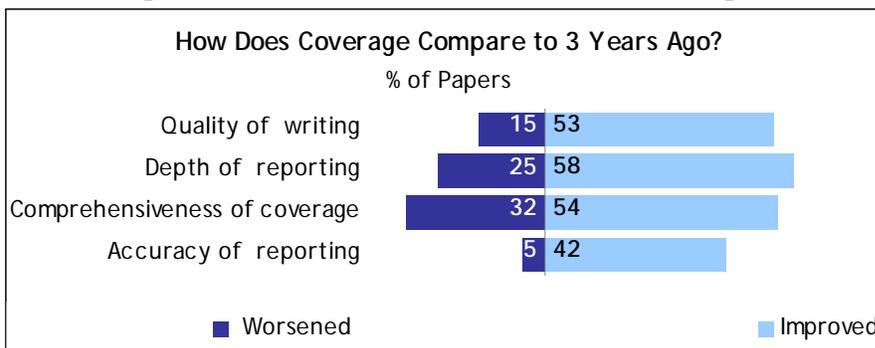
But the survey results suggested a sense of disillusionment among newsroom executives that their organization has been slow to recognize and adjust to a new business climate. Only a small minority (14%) of those responding to the survey agreed with the notion that their organization had anticipated and planned “very effectively” for the changes needed to remain competitive.

In addition to reducing staff and newshole, newspapers have also tried to cut costs other ways. Chief among them is efforts to economize on newsprint, a step that has taken on added urgency with a steady rise in newsprint prices that began last fall and at mid-year stood at their highest levels in over a decade. Today, the newsprint is thinner than it was a few years ago and newspapers are actively reducing the number of pages to counter the cost increases. Tribune Co., recently announced it planned to cut as many as 500 pages per week from the Los Angeles Times. And, as a metaphor of the times, the physical size--the so-called web width--of America’s daily newspapers is shrinking. Nearly three-quarters (73%) of those editors participating said their papers had reduced web width in the past three years as a newsprint cost-saving measure.

A Stubborn Optimism

In the end, one of the key elements determining the race’s outcome will be how well the quality of the journalism produced in America’s daily newspaper newsrooms can be sustained and whether the people who run these newsrooms have a vision for the future.

When it comes to the first of these questions, the quality of the work, many of the editors express a remarkable—at times almost eerie—optimism despite the adversities



they have faced. In general, the editors we talked to tend to look beyond what their newsrooms have lost in recent years and instead focus on the new vistas that technology has

suddenly opened to them and the new energy and purpose of a faster-moving newsroom. In interviews, a majority of editors said that, on balance, they believed the journalism produced by today’s smaller newsrooms was as good as or better than a few years ago.

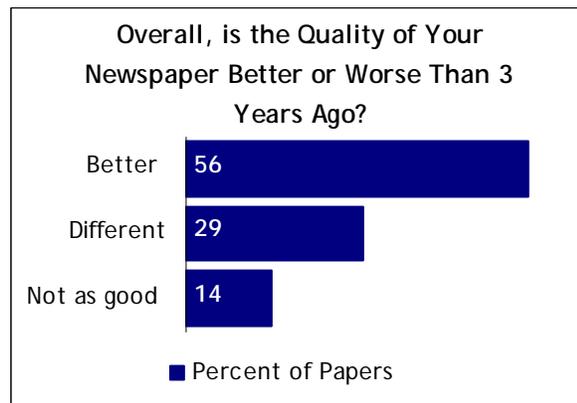
Survey responses reflected this same view. By sizable majorities, editors rated the accuracy, depth and comprehensiveness of the newsroom’s reporting and the quality of its writing as good as or better than three years ago. Despite the cutbacks in staffing and space, by 54% vs. 32%, clear majorities of editors said the comprehensiveness of their news coverage had either significantly or somewhat improved, despite the cutbacks, in

the last three years. By a 58% vs. 25% margin, editors also thought “the depth of their newsrooms” reporting had improved. A majority of editors (53%) also thought their paper’s writing had improved, despite the shift toward younger staff. An overwhelming 94% of editors said their papers were as accurate as or more accurate than three years ago. And a solid 56%, taking it all in, said the “overall quality of their news product is now better than it was before.”

Kaiser of the Milwaukee Journal Sentinel, agreed that “less could never be more,” when it came to newsroom size, but said he too was convinced his paper was stronger despite the loss of 20 newsroom staff positions over the past two years. The Journal Sentinel recently was awarded the 2008 Pulitzer Prize for local reporting.

“Let’s say we’re better focused, we do better projects,” he said. “We have to talk about the newsroom, not just the paper because we produce the website and other things, too.”

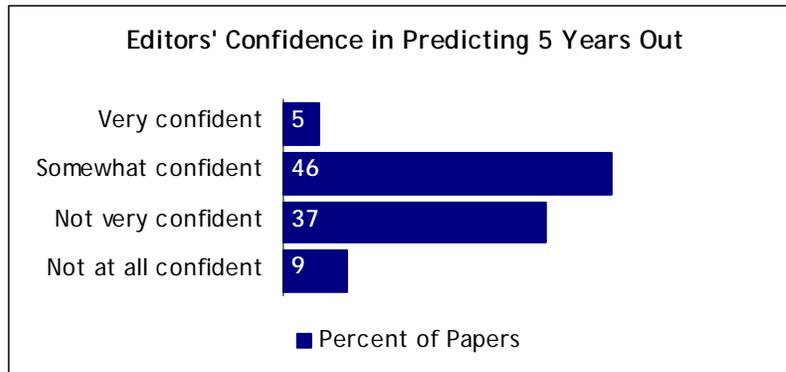
David Wilson, Managing Editor/News of Miami Herald, a paper that has seen its circulation and the size of its newsroom staff decline sharply in recent years, echoes Kaiser’s comment: “Through all that’s happened over the last few years, the quality of our work is among the best I’ve seen—and I’ve been here 31 years.”



How can this be? One explanation is just what editors have said—crisis has focused their thinking and made them sharper. Another factor may also be psychology. These are the editors who remain, who are facing this challenge. As newsroom leaders, their job is to build staff morale and combat defeatism. A sense of optimism is essential in doing that. On top of that, they are working hard, innovating, making changes. They may have fewer reporters and less space to work with, story by story, they are certain that what they are producing today is better than what they produced a few years ago.

Uncertainty

Despite all this, editors were far less certain an improved editorial product would be enough to guarantee a bright future. Doubts about their organization’s ability to make the changes needed to remain competitive were especially noticeable among those whose organizations had failed to anticipate change effectively in the past. Among this group of editors, only 28% thought their organizations were up to the task. By contrast, among editors who believe their organizations were somewhat, or very, effective in the past in anticipating changes, 63% expressed confidence they would again take the right steps.



When asked directly about their own confidence in imagining the future, editors seem cautious and only marginally more confident than not. Only 5% say they can predict with any certainty what their newsroom will look like in five years.

Another 46% said they were “somewhat confident” in their ability here, but an equal number (46%) said they were either “not very confident or not confident at all.”

In the face of such uncertainty, several editors cited their staff’s willingness to accept change and embrace new technology as the factor contributing most to their competitiveness. “Flexibility,” summed up one newsroom executive.

CONCLUSION

The explosion of readily available news and information on the web has, at least in part, eclipsed the long-held role of daily newspapers to deliver the news, but has yet to touch their unique contribution to the American democratic process: the ability to explore in depth highly complex subjects of public interest.

As a rule, the newspaper editors interviewed and surveyed for this report believe that no other medium has the ability to take a complicated, sophisticated, important issue and examine it in all its nuances.

One editor cited a package of stories in his own newspaper that day that explored a dispute over the hiring of minorities at a prestigious, publicly-funded downtown convention center construction project. The package included a story on the problems of recruiting minorities into construction trade apprentice programs and another on obstacles faced by contracting firms owned by African-Americans.

In a world where much of the new, fast-proliferating information available to the consumer stems from Internet sources that undergo little or no quality control, guarding the newspaper’s objectivity and credibility is considered crucial.

More than immediacy, editors said they believed these qualities were essential to the newspaper’s quest to remain relevant. Gage, the special projects editor at the Journal-World, speculated that if immediacy were to diminish as the most-valued quality for daily newspapers, they could eventually revert to late afternoon delivery. Such a development could potentially be a windfall, he says, because it would reduce the need to work unsocial hours and possibly draw more bright young people—who have traditionally been turned off by the hours—to the craft.

In the end, however, editors remain convinced the key to their survival is a good business model and strong journalism. As one editor interviewed for this named three basic ingredients needed “not just to survive, but thrive:” excellent journalism, strong investment to stay on the cutting edge of technology, and aggressive marketing of the product.

“If we do all those things, we’ll be fine—whether we’re 80% print and 20% web, 80% web and 20% print or 2% print and 98% web,” this editor said, though he asked that his comments be on background. “The profit margins may never be Gannett-like at 40-45% of revenue, but I think you can have a healthy business.”

Some editors predicted the future of newspapers will eventually be decided, not in print, but in a cyberspace fight for advertising between sites that provide entertainment and social networking on one side, and those that provide information and analysis on the other.

“There’s never been a greater need for good journalism,” said Miami Herald executive editor Gyllenhaal. “We’re in a global world and it’s complicated. What happens in Caracas really affects us here. But advertisers don’t care what gets them in front of people and if they all migrate to MySpace, Facebook or eBay and that weakens journalism to a point we can’t have 375 or 400 reporters on the street, then we won’t be able to deliver.”

Lawrence Journal-World editor Dolph C. Simons, Jr., put it in simpler terms: “I believe there’s a very strong place in our society for the printed word. It’s up to us to find out how best to utilize that opportunity. If we’re going to succeed, we have to drive with our brights on.”

METHODOLOGY

This study is based on two primary sources of information.

The first source is extended face-to-face interviews with editors and other newsroom executives at 15 daily newspapers across the United States. Interviews, conducted by Tyler Marshall, occurred between early November, 2007 and mid-January, 2008. Everyone interviewed for this report spoke initially on background. Where comments and thoughts are attributed by name, specific permission was received. Circulation figures of specific newspapers noted in the report are from the Audit Bureau of Circulations website and represent the average weekday circulation, rounded up or down to the nearest thousand, through the six months ending March 31, 2008.

The second source of information is the responses to a 43-question survey, administered by Princeton Survey Research Associates International (PSRAI) and sent to the editors of 1217 daily newspapers. The 259 replies included over half (55%) of all

papers with circulations of more than 100,000, as well as nearly one-third (30%) of all papers with circulations between 50,000 and 100,000. Among the country's far larger number of papers with circulations below 50,000, 177, or just over 17%, responded to the survey. Face-to-face interviews were conducted at newspapers in each category. The largest newspaper visited had a circulation of more than 670,000, the smallest around 20,000. All responses to the survey were anonymous. A complete methodology of the survey follows below.

Survey of Editors

This survey is based on responses from 259 top editors and news executives at U.S. daily newspapers. It was administered online by Princeton Survey Research Associates International (PSRAI). The surveys were completed from January 29 through February 29, 2008.

Requests for participation were sent to a total of 1,217 individuals via e-mail, with a link to an online Web address where the survey was hosted by PSRAI. Each respondent had a unique identification number 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 editors and senior news executives at all U.S. daily newspapers, regardless of circulation size, including those in Alaska and Hawaii. Weekly, ethnic and alternative newspapers were excluded from the definition. Editors were excluded if they did not have a valid email address available.

The sample was drawn from the online directory *Cision Media Source* (formerly *Bacon's Media Source*). After ineligible organizations were excluded, this list covered 1,265 U.S. daily newspapers. All qualified editors at eligible dailies were pulled from the *Cision* directory and were included in the sampling frame. Qualified editor titles included: editor, editor-in-chief, co-editor, editor/publisher, executive editor, and managing editor.

One individual editor per organization was selected for the sample. If an organization had multiple qualified editor titles, the senior-most title was selected. This resulted in a list of 1,265 top editors. After editors who did not have email addresses were eliminated, the final list consisted of 1,217 editors.

Editors were first emailed on January 29, 2008, explaining the study and requesting their participation. Emails included a link to the online survey as well as a unique password to gain entry into the web instrument. Follow-up emails were sent on February 5 to those who did not already complete the survey or did not refuse to participate. Where possible, follow-up telephone calls were made to editors to encourage their participation in the survey.

Survey of Editors of Daily U.S. Newspapers

FINAL TOPLINE

N = 259 web-administered interviews with editors and senior-most news executives of daily U.S. newspapers

Note: Due to rounding, percentages may not total 100%.

The Changing Newsroom

Q1 In the past three years, has the number of full-time editorial staff in your newsroom, including both print and web, increased, decreased, or remained the same?

	Total %	Big Papers ¹ %	Small Papers %
Increased	14	7	16
Decreased	59	85	52
Remained about the same	27	7	32
No answer ²	0	0	0

Q1b If you can, please estimate the percentage increase in the full-time editorial staff.

Based on those whose full-time editorial staff has increased in the past 3 years [N=37]

	Total %	Big Papers %	Small Papers %
1-9%	43	100	36
10-19%	35	0	39
20-29%	11	0	12
30-39%	3	0	3
40-49%	0	0	0
50%	0	0	0
51-100%	0	0	0
No answer	8	0	0

¹ “Big Papers” and “Small Papers”, referred to from here on, are defined as papers with circulation over 100,000 and a circulation of 100,000 or under respectively.

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.

Q1c If you can, please estimate the percentage decrease in the full-time editorial staff.

Based on those whose full-time editorial staff has decreased in the past 3 years [N=153]

	Total	Big Papers	Small Papers
	%	%	%
1-9%	26	22	26
10-19%	43	52	43
20-29%	24	22	24
30-39%	4	2	4
40-49%	0	0	0
50%	1	0	1
51-99%	1	0	1
No answer	2	2	2

Q2 Even though it may be difficult to predict, do you anticipate that the overall number of full-time editorial staff in your newsroom will increase, decrease, or remain stable in the next 12 months?

	Total	Big Papers	Small Papers
	%	%	%
Increase	4	6	4
Decrease	36	56	30
Remain stable	53	33	58
Can't predict	7	6	8
No answer	0	0	0

Q3 Roughly what percentage of content produced by your newsroom staff appears only on your website and not in the paper?

	Total	Big Papers	Small Papers
	%	%	%
Less than 10%	56	28	64
10-24%	29	52	23
25-49%	7	11	6
50%	*	0	*
51% or more	7	9	7
No answer	*	0	*

Q4 Approximately how much content on the website is original content, produced by your staff?

	Total	Big Papers	Small Papers
	%	%	%
0-24%	26	30	25
25-49%	11	9	12
50-74%	20	26	19
75% or more	38	33	39
Do not know	5	2	5
No answer	0	0	0

Q5 Do you operate your organization's website and newspaper as an integrated editorial product that is then tailored to different formats, or do you operate them as separate, distinct entities?

	Total	Big Papers	Small Papers
	%	%	%
Part of the same editorial product	81	63	86
Different and distinct entities	11	22	8
Other – Please specify	7	11	6
No answer	1	4	0

Q6 How important is each of the following skills for the newsroom reporting staff you hire today...?

	VERY ESSENTIAL	SOMEWHAT ESSENTIAL	NOT TOO ESSENTIAL	NOT AT ALL ESSENTIAL	NO ANSWER
	%	%	%	%	%
a. Multi-Media skills	39	51	9	1	0
b. Overall computer skills	65	31	3	*	*
c. Data Analysis skills	20	63	17	*	0
d. Ability to file quickly	59	37	3	1	0
e. Writing skills	88	12	0	0	0

Q7 Compared to three years ago, given the new demands on your newsroom and any staffing changes, how would you rate...?

	<u>SIGNI- FICANTLY IMPROVED</u>	<u>SOME- WHAT IMPROVED</u>	<u>NO NOTICEABLE CHANGE</u>	<u>SOME- WHAT WORSE</u>	<u>SIGNI- FICANTLY WORSE</u>	<u>NO ANSWER</u>
	%	%	%	%	%	%
a. The depth of your newsroom's reporting	18	40	16	23	2	1
b. The accuracy of your newsroom's reporting	11	31	52	5	0	1
c. The quality of your newsroom's writing	12	41	31	15	*	1
d. The comprehensiveness of your news coverage	18	36	13	29	3	1

Q8 Thinking of all the changes you have made in the last three years, would you say that, overall, the quality of your news product is now...?

	Total	Big Papers	Small Papers
	%	%	%
Better than it was before	56	54	57
Different but about the same as it was before	29	41	26
Not as good as it was before	14	6	17
No answer	0	0	0

Q9 Over the last three years, how effectively would you say your organization has anticipated and planned for changes needed to remain competitive?

	Total	Big Papers	Small Papers
	%	%	%
Very effectively	14	13	14
Somewhat effectively	61	57	62
Not very effectively	21	24	20
Not at all effectively	4	6	4
Haven't felt the need to change	*	0	*
No answer	0	0	0

Q10 How would you assess your news organization's awareness of the need to implement such changes to remain competitive in a timely manner?

Based on those who say their organization has effectively anticipated and planned for changes needed to remain competitive [N=193]

	Total	Big Papers	Small Papers
	%	%	%
Very strong	63	82	59
Somewhat strong	34	18	38
Not very strong	3	0	3
Not strong at all	0	0	0
No answer	0	0	0

Based on those who say their organization has ineffectively anticipated and planned for changes needed to remain competitive [N=65]

	Total	Big Papers	Small Papers
	%	%	%
Very strong	28	44	22
Somewhat strong	46	25	53
Not very strong	22	25	20
Not strong at all	5	6	4
No answer	0	0	0

Q11 Thinking about all the changes occurring in the last 3-5 years, what newsroom loss has hurt the most? (OPEN-END)

%	41	Loss of talented/experienced reporters/staff/Loss of institutional memory
	37	Reduction in staff size/Freezing positions
	6	Smaller news hole/Less space for stories
	5	Less community coverage
	5	Budget reductions/cuts/Lack of financial resources
	5	Loss of editors
	3	Rush to publish online/Lack of time to think
	2	Less training/Reduced money for training
	2	Less enterprise reporting
	2	Lower editing skills
	2	Less focus on overall editorial quality
	2	Reduction in beats covered
	2	Loss of flexibility
	2	Failure to upgrade technology
	2	Reduced quality of job candidates
	2	Fewer resources for print – more devoted to online media
	2	Lack of time in general
	16	Other
	7	None/No losses/No cutbacks
	10	No answer

Note: Table may exceed 100% due to multiple responses

Q12 What change in your newsroom has contributed the most to your ability to be competitive? (OPEN-END)

%	26	Focus on/Increased online/Web presence/use
	14	24/7 Continuous publication/Breaking news
	10	Multimedia in general
	10	Reorganization/Merging news/web
	9	Willingness to change or be flexible
	7	Added staff
	6	Online video
	5	Training
	5	Better reporting technology
	4	Creation of Web team/staff; New web-savvy staff
	4	Better web site
	4	Focusing on local news coverage
	4	Excitement/Dedication
	24	Other
	2	None
	10	No answer

Note: Table may exceed 100% due to multiple responses

Q13 Thinking about the past three years, has your news organization...?

	<u>YES</u>	<u>NO</u>	<u>NO ANSWER</u>
	%	%	%
a. Reduced the web width of the paper as a cost saving measure	73	25	1
b. Launched new tabloid sections or tabloid editions of existing sections	42	56	3
c. Launched new editorial products in tabloid format	55	44	1

Q14 Thinking about the past three years, has your news organization increased or decreased...?

a. Story Count

	Total	Big Papers	Small Papers
	%	&	&
Increased	46	39	48
Decreased	25	37	21
Stay About the Same	29	24	30
No Answer	*	0	*

b. Average Story Length

	Total	Big Papers	Small Papers
	%	%	%
Increased	3	0	3
Decreased	56	70	53
Stay About the Same	41	30	43
No Answer	*	*	*

c. Overall news hole

	Total	Big Papers	Small Papers
	%	%	%
Increased	6	4	7
Decreased	61	81	56
Stay About the Same	32	15	37
No Answer	*	0	*

Q15 In the last 3 years, has your news organization increased, decreased, or not changed the amount of space devoted to...?

a. Foreign News

	Total	Big Papers	Small Papers
	%	%	%
Increased	3	4	3
Decreased	64	65	64
Stay About the Same	31	30	32
No Answer	1	2	*

b. National News

	Total	Big Papers	Small Papers
	%	%	%
Increased	6	4	7
Decreased	57	57	57

Stay About the Same	36	37	36
No Answer	1	2	*

c. State/Local news

	Total	Big Papers	Small Papers
	%	%	%
Increased	50	44	51
Decreased	13	24	10
Stay About the Same	36	30	37
No Answer	2	2	1

d. Ultra-local, community news

	Total	Big Papers	Small Papers
	%	%	%
Increased	62	43	67
Decreased	8	19	5
Stay About the Same	30	37	28
No Answer	*	2	0

e. Editorial/op-ed/opinion

	Total	Big Papers	Small Papers
	%	%	%
Increased	17	7	19
Decreased	14	26	10
Stay About the Same	69	65	71
No Answer	*	2	0

f. Sports

	Total	Big Papers	Small Papers
	%	%	%
Increased	24	17	26
Decreased	25	52	18
Stay About the Same	50	30	56
No Answer	*	2	0

g. Business

	Total	Big Papers	Small Papers
	%	%	%
Increased	17	7	19
Decreased	34	48	30
Stay About the Same	49	43	51
No Answer	*	2	0

h. Arts

	Total	Big Papers	Small Papers
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	%	%	%
Increased	19	13	20
Decreased	24	41	19
Stay About the Same	57	44	60
No Answer	*	2	0

i. Features/Lifestyle

	Total	Big Papers	Small Papers
	%	%	%
Increased	15	4	19
Decreased	27	41	24
Stay About the Same	57	54	58
No Answer	*	2	0

j. Other News

	Total	Big Papers	Small Papers
	%	%	%
Increased	3	2	3
Decreased	24	35	20
Stay About the Same	66	52	70
No Answer	8	11	7

Q16 Amid financial pressures, how actively is your paper trying to develop new revenue streams?

	Total	Big Papers	Small Papers
	%	%	%
Very actively	69	76	67
Somewhat actively	28	22	29
Not very actively	2	0	2
Not at all actively	1	0	1
No answer	1	2	*

Q17 As the effort to develop new revenue streams continues, how concerned are you about the lowering of the traditional “wall” separating editorial and advertising?

	Total	Big Papers	Small Papers
	%	%	%
Very concerned	22	15	23
Somewhat concerned	37	26	40
Not very concerned	32	44	29
Not at all concerned	8	13	6
No answer	1	2	*

Q18 How essential is each of the following to the quality of your news product?

a. International News

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	10	26	6
Somewhat Essential	41	54	38
Not Very Essential	38	20	43
Not Essential At All	10	0	13
No Answer	0	0	0

b. National News

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	18	41	12
Somewhat Essential	53	43	56
Not Very Essential	24	17	26
Not Essential At All	4	0	5
No Answer	*	0	*

c. State/regional News

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	52	67	48
Somewhat Essential	44	30	48
Not Very Essential	2	2	2
Not Essential At All	*	0	0
No Answer	2	2	2

d. Local News (including suburban)

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	97	94	98
Somewhat Essential	2	2	1
Not Very Essential	0	0	0
Not Essential At All	1	4	*
No Answer	0	0	0

e. Ultra-local (neighborhood) news

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	76	48	83
Somewhat Essential	20	41	15
Not Very Essential	2	7	1
Not Essential At All	1	4	*
No Answer	*	0	*

f. Sports

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	78	85	77
Somewhat Essential	20	15	21
Not Very Essential	2	0	2
Not Essential At All	*	0	*
No Answer	0	0	0

g. Business

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	37	70	29
Somewhat Essential	51	24	58
Not Very Essential	11	6	12
Not Essential At All	1	0	1
No Answer	0	0	0

h. Arts

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	34	52	29
Somewhat Essential	56	43	60
Not Very Essential	7	4	8
Not Essential At All	2	0	2
No Answer	2	2	1

i. Investigative/enterprise reporting

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	60	91	52
Somewhat Essential	31	6	38
Not Very Essential	8	0	10
Not Essential At All	1	0	1
No Answer	1	4	0

j. Science/technology

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	10	26	5
Somewhat Essential	43	54	40
Not Very Essential	38	17	44
Not Essential At All	9	4	10
No Answer	0	0	0

k. Other

	Total	Big Papers	Small Papers
	%	%	%
Very Essential	3	2	4
Somewhat Essential	28	28	28
Not Very Essential	22	11	25
Not Essential At All	8	2	9
No Answer	38	57	33

Q19 Here is a list of beats and newsroom assignments. Please indicate as best you can, whether the amount of reporting power devoted to covering these areas has increased, decreased, or is the same as 3 years ago.

	<u>INCREASED</u>	<u>DECREASED</u>	<u>REMAINED ABOUT THE SAME</u>	<u>NO ANSWER</u>
	%	%	%	%
a. Police/crime beat	30	12	58	0
b. Courts	20	20	61	0
c. Local government/politics	30	14	56	1
d. Regional government/politics	13	24	62	1
e. State government/politics	14	24	61	1
f. National government/politics	6	41	52	2
g. International affairs	1	46	49	4
h. Investigative reporting	30	24	46	*
i. Film/The arts	15	25	58	1
j. Environment	22	17	60	1
k. Science	8	24	64	3
l. Education	36	16	47	*
m. Sports	30	16	53	1
n. Business	19	30	49	2
o. Life style/Features	15	28	57	0
p. Obituaries	17	10	72	1

Q20 Now we'd like to ask you about other news areas. Again, please indicate as best you can, whether the amount of editorial power devoted to covering these areas has increased, decreased, or is the same as 3 years ago.

	INCREASED	DECREASED	REMAINED ABOUT THE SAME	NO ANSWER
	%	%	%	%
a. General assignment editing	16	30	52	2
b. Copy desk editing	12	42	44	2
c. Special assignment editing	12	27	55	6
d. Web-only editing	57	6	32	5
e. Photographers	12	31	55	3
f. Videographers	63	3	26	7
g. Graphic artists	14	23	59	5
h. Editorials	15	16	66	2

Q21 Has your news organization published geographically zoned editions in the last three years?

	Total	Big Papers	Small Papers
	%	%	%
Yes	42	83	31
No	56	17	66
No answer	2	0	2

Q22 Has the number of zoned editions increased, decreased or stayed the same?

Based on those who have published geographically zoned editions in the last 3 years [N=109]

	Total	Big Papers	Small Papers
	%	%	%
Increased	37	27	44
Decreased	25	31	20
Stayed the same	38	42	34
No answer	1	0	2

Q23 On their web sites, many news organizations now provide content for local, community-focused sub-sections — known as micro-sites. Which of the following best captures your organization’s position on this development? (SELECT ONLY ONE)

	Total	Big Papers	Small Papers
	%	%	%
We have micro-sites and plan to add more.	21	28	20
We have micro-sites and are currently assessing their value.	9	13	8
We are developing micro-sites.	21	33	18
We have decided not to include micro-sites at this time.	8	11	8
We have not yet addressed this issue.	38	11	45
No answer	3	4	2

Q24 How do you and other senior colleagues split your time between developing the newspaper and the website?

	Total	Big Papers	Small Papers
	%	%	%
Focus mainly on the newspaper	14	4	17
Focus on both, but more on the newspaper	49	48	49
Focus roughly equally on both	30	39	27
Focus on both, but more on the website	5	4	6
Focus mainly on the web	*	2	0
No answer	2	4	1

Q25 Which statement would you say best describes your view about the impact of technology on your newspaper?

	Total	Big Papers	Small Papers
	%	%	%
I’m worried the web’s emphasis on speed and immediacy poses a danger to the accuracy and journalistic values of the newspaper.	6	4	6
I’m excited that web technology offers the potential for greater-than-ever journalism and will be the savior of what we once thought of as newspaper newsrooms.	43	57	40
I’m conflicted because I feel a mixture of both.	48	37	51
No answer	3	2	3

Q26 How often during the day do you look at the statistics on the traffic to your paper's web site?

	Total	Big Papers	Small Papers
	%	%	%
Less than once a day	42	24	47
Once a day	35	44	32
2-3 times a day	16	22	14
More than 3 times a day	6	7	5
No answer	2	2	1

Q27 As newspapers continue their transformation, how confident are you of your personal ability to understand and capitalize on the technological innovations that can improve your product?

	Total	Big Papers	Small Papers
	%	%	%
Very confident	35	35	35
Somewhat confident	51	50	52
Not very confident	10	9	10
Not at all confident	1	0	1
No answer	3	6	3

Q28 How confident are you of your ability to predict with any degree of certainty what your newsroom will look like five years from now?

	Total	Big Papers	Small Papers
	%	%	%
Very confident	5	4	6
Somewhat confident	46	31	50
Not very confident	37	54	33
Not at all confident	9	6	10
No answer	3	6	2

Q29 How many staff-written blogs does your news organization publish?

	Total	Big Papers	Small Papers
	%	%	%
None	29	0	37
1-9	43	22	48
10-19	15	31	11
20-29	6	19	3
30-39	3	13	0
40 or more	3	13	0
No answer	2	2	1

Q30 How do you exercise editorial control over staff-written blogs?

	Total	Big Papers	Small Papers
	%	%	%
The blogs are edited for copy editing prior to posting.	18	31	15
The writers post directly online, with editing done post-publication.	16	24	14
The writers post online and an editor may or may not edit post-publication.	36	43	35
No answer	29	2	37

Q31 Does your news organization publish citizen-written blogs?

	Total	Big Papers	Small Papers
	%	%	%
Yes	40	50	37
No	59	48	61
No answer	2	2	1

Q32 How comfortable are you with the degree of control your news organization has over this content?

Based on those who publish citizen-written blogs [N=103]

	Total	Big Papers	Small Papers
	%	%	%
Very comfortable	35	33	36
Somewhat comfortable	53	59	51
Not very comfortable	8	4	9
Not at all comfortable	3	4	3
No answer	1	0	1

Q33 Which of the following best sums up your feelings about citizen-produced content for your news organization?

	Total	Big papers	Small Papers
	%	%	%
An essential ingredient for the website and newspaper of the future that carries the added value of giving the community an equity in the news organization	46	54	44
An interesting but limited concept in which citizen input is best kept either to very small stories or to basic informational material such as restaurant reviews or social event previews	42	41	43
Not a concept that belongs in our news organization	7	4	8
No answer	4	2	5

Q34 Overall, how would you rate the overall value of citizen content?

	Total	Big Papers	Small Papers
	%	%	%
Very valuable	25	24	25
Somewhat valuable	59	57	60
Not very valuable	12	17	10
Not at all valuable	2	0	2
No answer	3	2	3

Q35 Has your news organization implemented “early teams” of reporters whose primary responsibility is filing for the web during the morning hours?

	Total	Big Papers	Small Papers
	%	%	%
Yes	42	80	33
No, but we are thinking of adding those soon	17	11	18
No and it is not in our current plans to do so	37	7	44
No answer	4	2	5

Q36 Roughly how many of your reporters have been trained to shoot video and are currently equipped and expected to file video content for the web from a remote location?

	Top	Big Papers	Small Papers
	%	%	%
Most or all	13	4	16
More than half	7	7	6
Less than half	26	48	20
Few	25	33	23
None	25	6	30
No answer	3	2	4

Q37 How much value do you believe these mobile journalists, so called Mo-Jo’s, add to your news product?

Based on those who have reporters who have been trained to shoot video and file video content for the web from a remote location [N=185]

	Total	Big Papers	Small Papers
	%	%	%
A great deal	28	40	24
Some value	50	50	50
Not much value	11	6	13
No value at all	3	2	3
We do not employ mobile journalists at this time	8	2	10
No answer	0	0	0

Q38 Which of the following matches your current average weekday circulation?

	Total	Big Papers	Small Papers
	%	%	%
Under 50,000	65	0	82
50,000-100,000	11	0	14
100,001-200,000	12	50	2
Over 200,000	10	48	0
No answer	2	2	2

Q39 Which of the following best describes the ownership structure of your news organization?

	Total	Big Papers	Small Papers
	%	%	%
A publicly-owned newspaper headquartered in your city	5	17	2
A publicly-owned newspaper headquartered outside your city	34	30	36
A privately-owned newspaper headquartered in your city	19	19	19
A privately-owned newspaper headquartered outside your city	40	33	41
No answer	2	2	2

Q40 Has your newspaper changed ownership in the last 2 years?

	Total	Big Papers	Small Papers
	%	%	%
Yes	14	22	12
No	83	76	85
No answer	3	2	3

Q41 How long have you been in your current position at this news outlet?

	Top	Big Papers	Small Papers
	%	%	%
More than 5 years	51	52	51
Between 2 and 5 years	24	22	24
Between 1 and 2 years	14	9	15
Less than 1 year	10	15	8
No answer	2	2	2

Q42 In all, for how many different news outlets have you been the editor or the most senior news executive?

	Total	Big Papers	Small Papers
	%	%	%
One (This is my first such position)	45	41	46
Two	25	33	23
Three	12	9	13
Four or more	14	13	14
No answer	3	4	3

Q43 PEJ pledges to keep your answers to these questions confidential. Only summary results from the survey will be released. Strictly to insure that the survey is being conducted to the highest quality standards, we would like to confirm that you are <<INSERT FULL NAME FROM SAMPLE>>, who was the editor sent this User ID number. If that is correct, please check Yes. If not, please check No and fill in your name and title.

	Total	Big Papers	Small Papers
	%	%	%
Yes	94	93	94
No	3	6	3
No answer	3	2	3

Response Rates

A total of 259 of the 1,217 news executives completed the survey, or 21 percent. Here is how the raw response rate varied by newspaper size, defined by daily circulation.

% response by category	
Daily Circulation	
Under 50,000	17%
50,000-100,000	30%
100,001-200,000	52%
Over 200,000	59%
Total	21%