

European Digital Journalism Study

The digitalisation of media,
the recession – and the impact
on the PR industry



ORIELLA
PR NETWORK

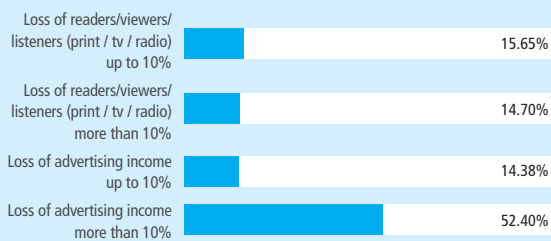
In 2008, the Oriella PR Network undertook a survey of over 350 journalists across Europe to determine what impact the advent of the Internet and widely-available broadband had had on the world of journalism. One year on, we looked to see if journalists have acclimatised further to their digital environments and whether they are under more or less pressure due to the current economic turbulence.

In June and July 2009, over 350 journalists were polled from broadcast, national, regional and trade media across Belgium, France, Germany, Spain, Sweden, The Netherlands and the UK to monitor the evolution of the daily role and routine of a journalist in Europe.

Recessionary woes

The main impact on journalism between this year's and last year's survey is, not unexpectedly, the economic downturn. An anxiety has gripped the industry and there is a genuine feeling that its future, in its current form, is not guaranteed. Advertising, upon which so many publications rely, has seen a very sharp decline with over half of respondents confirming a loss of advertising income by more than 10%.

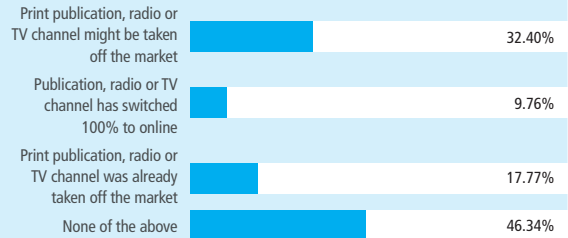
In which way does the current economic crisis and the structural change of the media landscape (shift to online) affect your media today?



source: European Digital Journalism Study – Oriella PR Network

These economic strains are already starting to take their toll. A third of respondents thought that their "traditional" media channel (print, radio or television) may well be taken off the market, while nearly one in five confirmed that this has already happened to their publication. This concern was highest in the UK, where 75% felt this to be the case, and lowest in Belgium and the Netherlands, where only a quarter felt this. The potential good news for all these outlets is that the online platform, at least, offers an alternative to keep the publication alive. 10% have already made a complete switch from traditional to online and with the rapid growth and bullishness of online advertising at the expense of print and screen advertising, it could be argued that this number could well grow.

In which way does the current economic crisis and the structural changes of the media landscape (shift to online) affect your media in the long term?

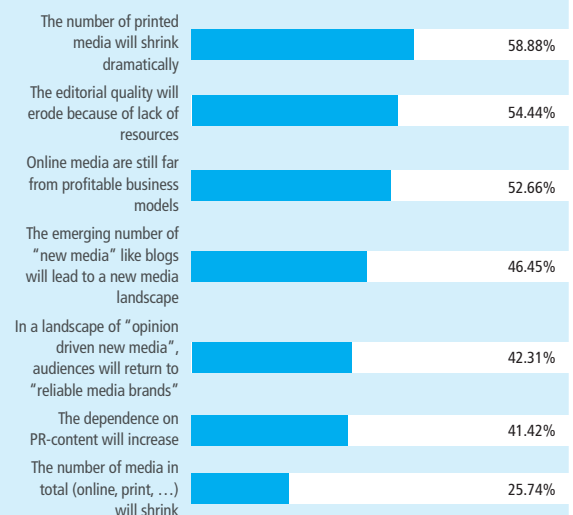


source: European Digital Journalism Study – Oriella PR Network

Some of the most compelling statistics from this year's survey came in the form of journalists' predictions as a consequence of the economic restrictions within editorial offices and the shift to online. Nearly 60% agreed that the number of printed media will shrink dramatically – in Germany, Sweden and the UK, this sentiment was shared by over two thirds of all journalists. Also, over half (53%) felt the alternative (online media) is still a far from profitable business model. This pessimistic outlook continued when asked about the quality of journalism, with 54% believing this would erode due to lack of editorial resources.

However, there were also some more positive insights to take from journalists' predictions. Only a quarter thought the number of media in total would shrink and nearly half felt that the emerging number of "new media" would create a new media landscape. Respondents in Sweden were most optimistic in this regard with two thirds supporting this view. There was also good news for the PR industry with over 40% of journalists claiming that the dependence on PR-content will increase as a consequence.

Because of the economic restrictions within editorial offices and the shift to online, we presume the following developments.



source: European Digital Journalism Study – Oriella PR Network

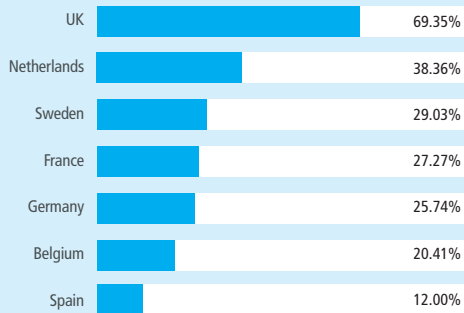
Twitter – new kid on the new block

Last year’s survey revealed the impact that new media, such as video, blogs and podcasts, had had on the 21st century journalist, with the vast majority having to adapt their working days to incorporate all emerging digital technology. The evolution of digital practices within journalism has not relented in the last 12 months.

One of the biggest phenomena in 2009 to hit not just journalism, but the entire world, is Twitter. It has rapidly become one of the most effective communications tools for consumers across the globe, but especially for journalists and their respective publications. The thirst for instant news had not been quenched with consumers demanding news in an even more instant fashion. With Twitter allowing publications to simply publish the headline of their news story, followed by a link to the full story, these media outlets have been able to satiate this appetite. The biggest publications have been quick to jump on this trend and already the likes of The Guardian, El País and Le Monde have tens of thousands of followers. Over a third of all European publications now have Twitter channels, with the UK and the Netherlands being the earliest to adopt widely.

Which of the following formats do you offer online?

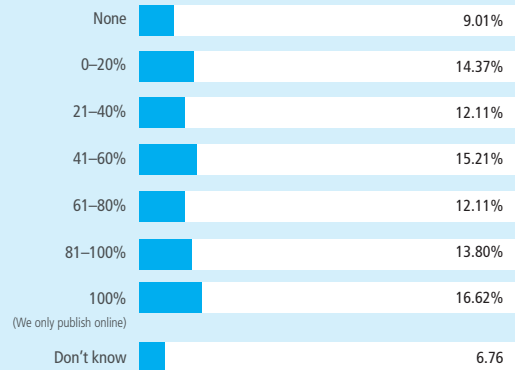
Twitter Channels.



source: European Digital Journalism Study – Oriella PR Network

When it comes to how publishers have embraced the web, the balance is tipping away from using it purely to archive material to increasingly using it for new content. Only 9% now use their outlets only as an archive, while 43% confirm that at least 60% of the material produced online is original. This is a step up from last year’s ‘40/40 Factor’, where 40% of respondents produced 40% of their output online in the first instance.

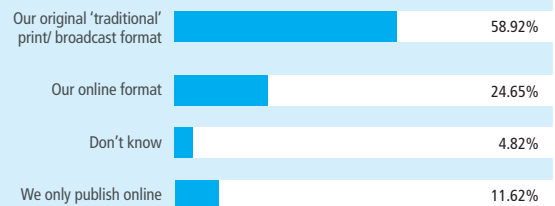
Approximately how much of your online content is new (ie not repetition of existing offline content)?



source: European Digital Journalism Study – Oriella PR Network

This rise is reflected in publications’ audiences. While it is true that print and broadcast formats still bring the largest audiences, a quarter of all those polled (that were not online only publications) confirmed that their online format now accounts for their largest audience. This figure rises to 40% in Spain.

On which format do you have the largest audience?

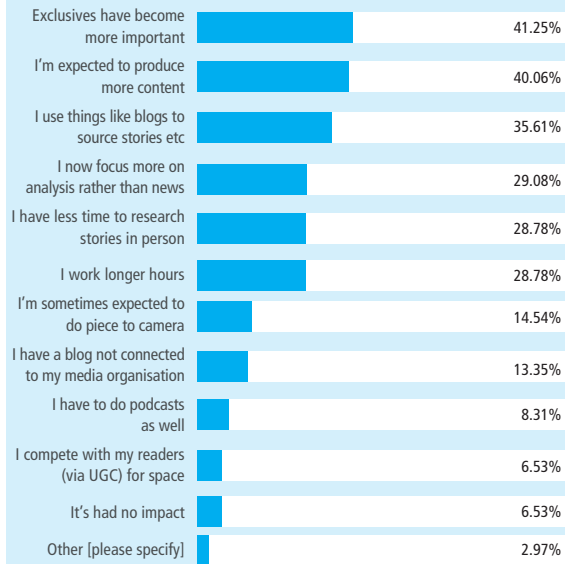


source: European Digital Journalism Study – Oriella PR Network

Doing more with less

However, the steady rise in original content produced for the web has not replaced the more traditional media (yet), but rather has become another channel that needs to be catered for alongside print or broadcast formats. The result is an increased workload for journalists with over 40% confirming they have to produce more content. This figure rises to over half in France, Sweden and the UK. Almost a third (29%) also declare that they have to now work longer hours.

In what way has the Internet, and the delivery of media content over the web, changed your role? [please tick statements you agree with]

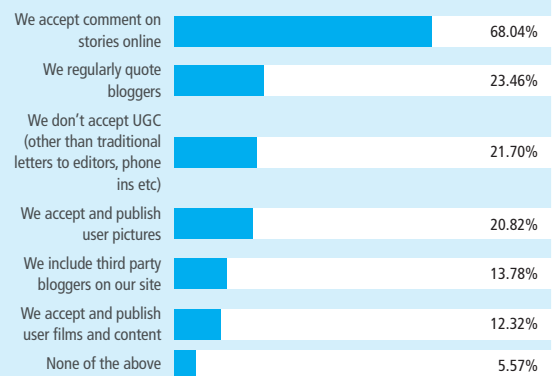


source: European Digital Journalism Study – Oriella PR Network

To adhere to the demands of the web, journalists are increasingly turning to user generated content (UGC) to help satisfy the demand for online content. Only a fifth of all those polled do not accept UGC at all. Two thirds (68%) encourage comments on stories online, while a quarter now quote bloggers in their original stories, highlighting the influence of the blogosphere as a resource for editorial content. Interestingly, however,

the number of outlets that accept user pictures and films has diminished since last year. This is likely to be another indication of the force of the recession. Editorial teams have shrunk dramatically and the writers left are completely focussed on filling their publications' editorial requirements, in print and online, and now do not have the resources to edit and veto pictures and films. It is, of course, possible, in some cases, that media are more wary of the integrity of UGC.

Which of the following applies to your media organisation's approach to user generated content (UGC)?



source: European Digital Journalism Study – Oriella PR Network

Nevertheless journalists do have to look beyond the simple production of text to convey their story. Multi-channel reporting formats continue to be adopted as a means to engage with a publication's audience. Nearly half of all those polled offered online television or video clips (47%) and journalist authored blogs (46%) – both

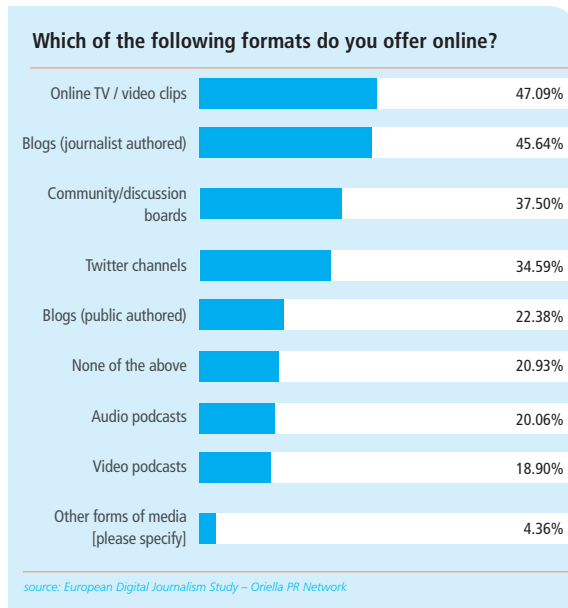
"It's time to change the mindset"

Comment by Professor Dr. Ansgar Zerfass, University of Leipzig

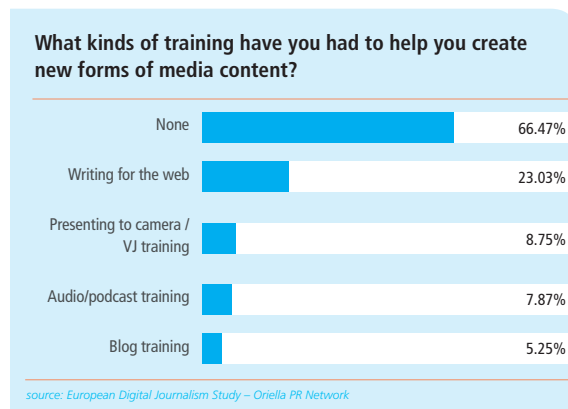
Journalism in Europe is facing turbulent times – and communication professionals need to be aware of the emerging structures that will change their business as well. The study presented here shows it is not just about addressing media with new tools. The crisis will turn the media landscape upside down. It is time for a new mindset in public relations: moving from print to video, stimulating stakeholders to produce authentic content, helping the media to survive as trustworthy entities, rather than striving for quick wins.

Comparing this journalism survey with our own research into public relations trends across Europe (www.communicationmonitor.eu) shows there is still a long way to go. Both PR professionals and journalists predict a sharp decline of the print media. 42% of the journalists think they will be more dependent on content submitted by the other side, and three out of four communicators believe their kind will adapt to new routines in journalism. However, many have not understood the new rules of the game. Whereas more and more journalists offer online videos (48%) and blogs (47%), less than one third of PR professionals (29% resp. 25%) think these platforms are important today. At the same time, communicators – as well as journalists – lack expertise with online channels. According to our empirical insights, one out of four PR professionals have training in this area. Though journalists are seldom qualified for video reporting and blog authoring, communication departments are neither. Organisations need to strengthen their efforts – because the digital age is real, here and now.

significant increases on the year before. Additionally a fifth also produce audio and video podcasts for their readers.

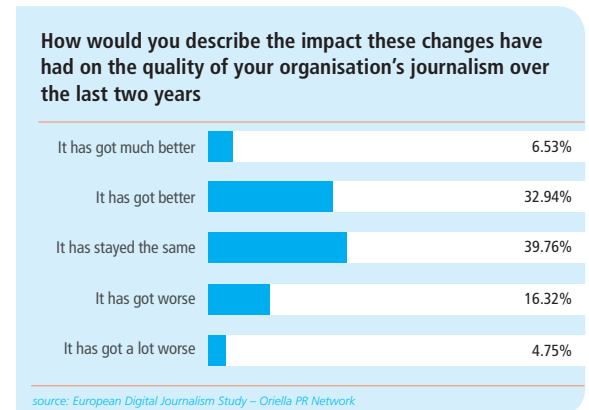


Despite this demand for differing reporting formats, journalists are expected to learn these production skills themselves. Two thirds (67%) confirmed that they are self-taught in these digital formats, with under one in ten (9%) having received any kind of presenting to camera training – a figure that shrinks to under one in 20 in Benelux, Spain and Sweden.

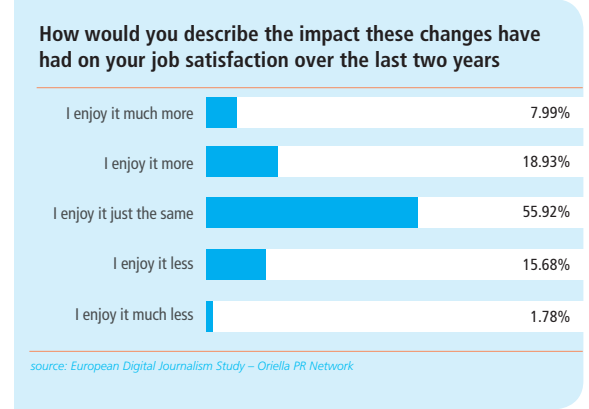


Job satisfaction and increased quality

One might expect that the combination of the worst recession for 100 years and the fact that journalists are having to work more and produce more would create a negative mood within the industry. However, somewhat surprisingly, this survey has revealed an unexpected insight. 40% feel that the quality of journalism has improved over the last two years, despite these sweeping changes to the industry. In France and Spain, this figure rises to 60%. Only one in five feel the quality has worsened as a result.



Additionally, journalists remain happy with their jobs, despite the pressures being exerted on them. 84% say that they are happier or just as happy with their job.



The impact on the European PR industry

The main difference between this year's survey and last year's is the colossal impact the recession has had on the media. Advertising spend has reduced significantly, meaning that publications in all formats have had to make hefty cuts in all departments, including editorial. The media can no longer solely rely on revenue from advertisers, so they have to seek new sources of revenues such as advertorial deals, promotions and subscriptions. In addition journalists across all kinds of media are under pressure to produce more stories faster – and, wherever possible, stories that break news.

The pressure is intensified by the fact that the 'Digital Age' revolution shows no signs of relenting, with journalists having to adopt to even more channels, such as Twitter, as well as continuing to produce news and features for print, online, video and audio formats. In our view, as this survey demonstrates, most of the journalists seem to have welcomed the freedom, immediacy and inter-activity this new multi-media world offers.

These developments, more than ever, require PR Officers (PROs) to deliver content to journalists in a succinct fashion, so that they can take the information provided and turn it into a compelling story with minimum effort. Looking at these results, and the pressure journalists now face, PROs now need to think like journalists and craft the story for them to increase their chances of publication.

When selling a story in, PROs need to consider what a journalist can call upon to verify or add to the story. Journalists need to get their story up fast so help them save time by having an analyst or third party organisation on hand to back up your claims? Are there any specific blogs or customer forums that could substantiate the story? Could the release be more honed to the social media environment and include links to relevant websites, blogs and Twitter feeds?

These are all the kinds of considerations a journalist would consider when putting a story together and the PRO can help at every step. If a PRO can handle these elements of the process for the journalist, not only will the story be better and on its way to publication faster, but the journalist will be more likely to remember and come back to that PRO in the future.

We, like many PROs, see the current challenges facing the journalism industry as an opportunity. We need to bring together companies and media to create communication strategies and content that both build brands and entertain/inform readers. More than ever there is the potential for a symbiotic relationship with the PR professional as the key advisor and intermediary. The starting point for this evolved role is a better understanding of the changing needs of the media, something to which we hope this survey can make a significant contribution.

With special thanks to:

Stephan Fink, Fink & Fuchs Public Relations

Sam Kane, Brands2Life

And all the partners and journalists who participated in the study

About the Oriella PR Network



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

The *European Digital Journalism Study* was compiled in June and July 2009, using an online survey of 354 journalists from broadcast, national, regional and trade media across Belgium, France, Germany, Spain, Sweden, The Netherlands and the UK.

Contact details

Brands2Life UK

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

LVT Benelux PR Belgium / The Netherlands

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

Ballou PR France

Collette Ballou Lamotte
+33 (0)1 42 22 24 10
cballou@balloupr.com

Clipping-TU France

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

Fink & Fuchs Public Relations Germany

Anna Dönges
+49 (0) 611 741 310
anna.doenges@ffpr.de

PR-COM Germany

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

TT&A Italy

Patrick Trancu
+39 025 845 701 patrick.trancu@tta.it

Canela PR Spain

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

Westmark Information Sweden

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

For more information on the Oriella PR Network go to:

www.oriellapnetwork.com