THE INFLUENCE GAME:
HOW NEWS IS SOURCED AND MANAGED TODAY

ORIELLA PR NETWORK
GLOBAL DIGITAL JOURNALISM STUDY 2012

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EXECUTIVE SUMMARY

This year's Oriella Digital Journalism Study is a milestone in many ways. Firstly, it marks the study's half-decade, and marks more clearly than ever the deepening penetration of digital and social media into all areas of newsgathering and reporting. Secondly, thanks to recent growth in our network in Asia-Pacific, we can provide a truly global perspective spanning both emerging and mature markets.

The study was compiled in April and May 2012 using an online survey of 613 journalists in 16 countries from broadcast, national, lifestyle, regional and trade media and blogs in the Brazil, Canada, China, France, Germany, Italy, the Netherlands, New Zealand, Portugal, Russia, Spain, Sweden, Thailand, Vietnam, United Kingdom and the United States. On average, 38 journalists were surveyed in each country.

The headline trends from this year's study include:

- **Imbalances in the global economy are playing themselves out in newsrooms.** Journalists in Asia, Brazil and Russia were far more upbeat about the outlook for their organization and their work than their counterparts in Western Europe and North America.
- **The shift to online is slowing when it comes to publishing.** This year, just under half (48%) of respondents said their biggest audience was offline – not a huge change on the 50% we reported in 2011. However, the shift is more significant when compared with 2009, when 59% of respondents gave pre-eminence to offline formats.
- **Social media have become firmly established in the journalistic arsenal.** 2011's study uncovered significant evidence of journalists treating social media channels, like Twitter, as sources of news – and also as a means of validating stories already being written. This year, more than half the journalists surveyed said they drew on social media posts from sources they knew when looking for story ideas or angles.
- **Publications around the world are making use of a wider range of content assets than ever before.** This includes content both produced in-house and sourced externally.

THE RETURN OF THE 'TRUSTED SOURCE'

This year, our findings evidence a shift away from crowd-sourcing and pre-packaged stories (in the form of press releases) to a fast-growing preference for input from trusted sources. In many ways, the trend marks a return to more traditional journalistic practices after a decade of upheaval in newsgathering prompted by email, the web and social media. The informed individual seems to have regained the edge over the wisdom of the crowds.

Paradoxically, these same technologies have also made the process of building a position of trust far more transparent. There are broadly four phases to this approach:

1. Articulate the point of view that defines your brand.
2. Build a network of supporters: like-minded individuals and stakeholders who will amplify your message.
3. Tell the same story across all platforms: communicate using print, social and digital media, but also via events, sponsorships and influencer engagement.
4. Move with the times: keep broadly consistent with your core message, but be ready to align with relevant discussion topics that are trending.

- **Credibility – whether online or off- has re-emerged as a key consideration for media.** Simply having a presence on the right social platforms is no longer enough. Brands wishing to make their voices (or those of their experts) heard on key issues need to put more effort into developing clear points of view, expressing them plainly across all platforms, and building networks of supporters – both online and off.

GLOBAL MEDIA STILL IN FLUX

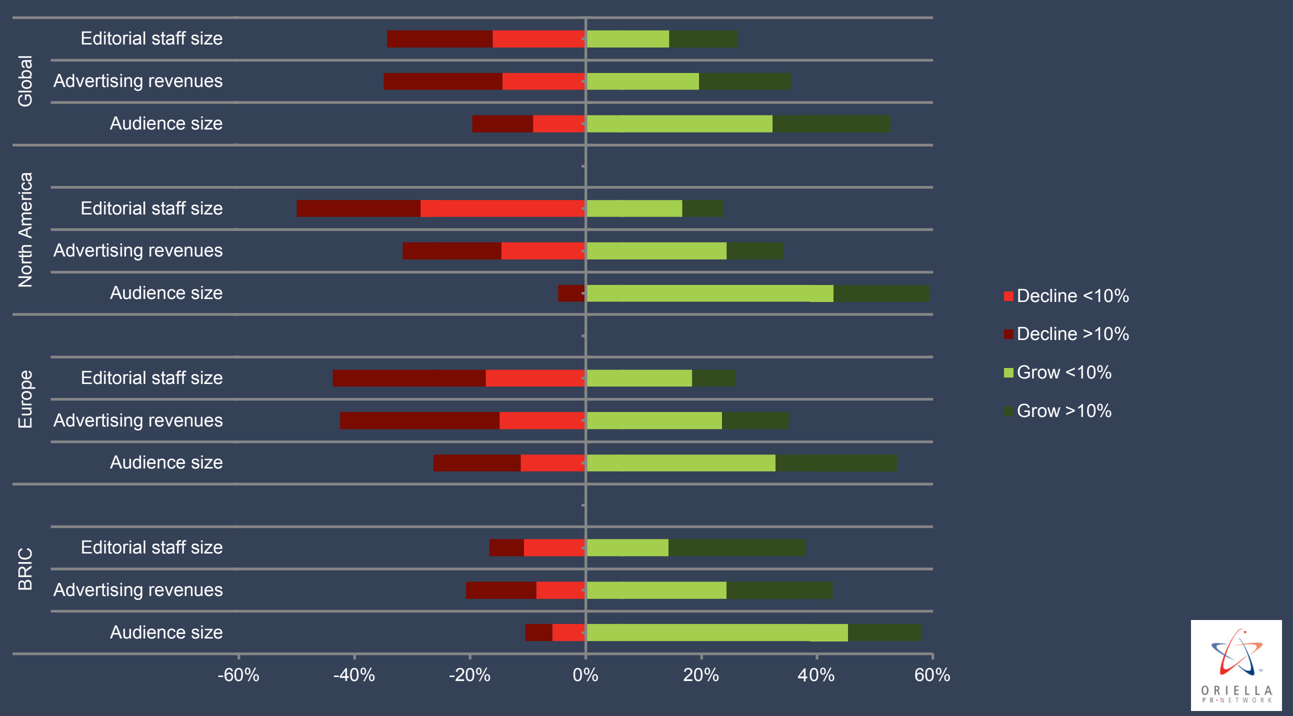
In 2011, we asked if the dust had at last settled on several years of turmoil in the media sector. This year, just 12% believed their publication would be taken off the market, down from 21% in 2011. However, there are important regional trends which reflect the uneven trajectory of the global economy.

The most downbeat respondents were in Europe. 43% of European journalists said their publications' revenues had fallen, compared with 21% in Brazil, Russia and China, and 32% in North America. In Spain, a whopping 67% of respondents reported declines in revenues.

The findings show North America has not been left completely unscathed by the past few years' economic turmoil. Publications here appear to have been hardest-hit by reductions in editorial staff (60% of respondents reported staff reductions), though advertising revenues have fallen far less sharply.

By contrast, the most upbeat respondents in the survey came from Russia, where 51% reported revenue growth; 68% saw audiences grow; and 46% had grown their editorial staff. More journalists in Brazil, China and Russia reported increases in editorial staffing (38%, compared with a global average of 26%) and advertising revenues (42%, global average 36%) than their counterparts elsewhere in the world. These regions also reported far lower reductions in staffing.

HOW HAS THE CHANGING MEDIA LANDSCAPE AFFECTED YOUR PUBLICATION? ('NO CHANGE' RESPONSES OMITTED)



Industry research indicates the BRIC region will experience the fastest growth in media spend over the next two years. According to the WARC Consensus Ad Forecast, Brazil, Russia, India and China will experience double-digit growth in ad spend during 2012, compared with just 2% in France and 3.4% in the UK.[1]

PRINT VS DIGITAL ENDS IN A DRAW?

For the past five years, the Oriella Digital Journalism Study has charted the gradual shift from print to online publishing. Considered globally, the years 2008-2010 saw some acceleration towards digital-only content, but there was a levelling-off in 2010-2011, and this has continued in 2012. This year, 48% of respondents maintained their largest audiences were offline (2011 figure: 50%). The proportion of respondents each year saying less than 20% of their online content is new has remained broadly the same – between 20% and 25%. As in 2011, the survey's respondents are broadly evenly split between on- and offline content.

1 WARC, April 2012 http://www.warc.com/Content/ContentViewer.aspx?ID=2fca37de-7868-4ffb-82e0-79ab70a1682b&MasterContentRef=2fca37de-7868-4ffb-82e0-79ab70a1682b&Campaign=CFAPR12

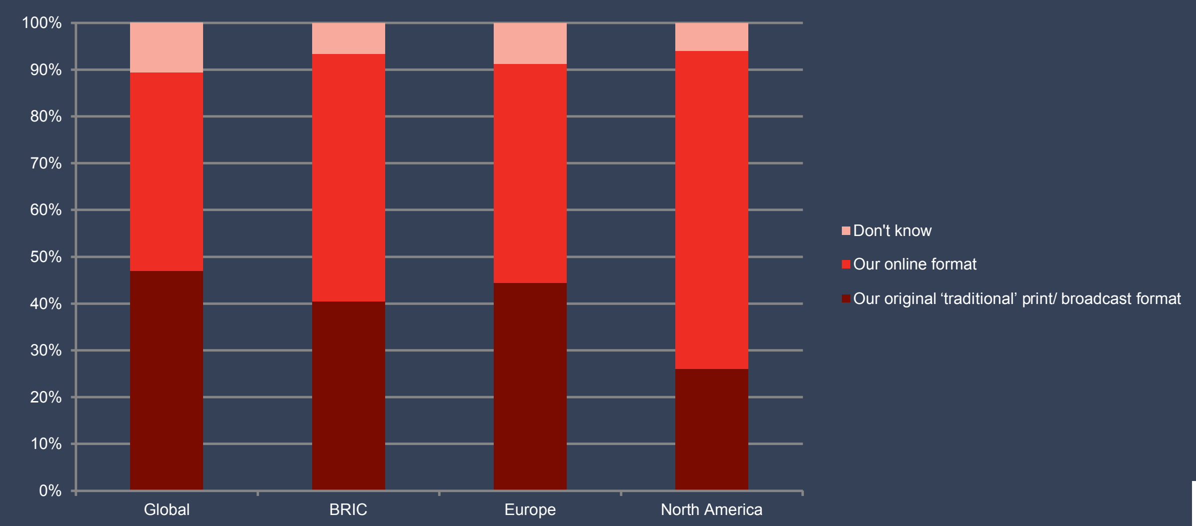
There are some interesting anomalies on a country-by-country basis. 63% in New Zealand said their readership was mainly offline; in general, adoption of digital and social platforms there seemed well below the global average. This may be explained by predominance of regional publications in the survey sample, and also by the low average broadband speeds in New Zealand (the country ranks seventh in Asia-Pacific connectivity rankings and 44th globally)[2].

Russia, Brazil, France and the USA are countries where the shift to online appears to be definitive in the eyes of respondents. In Russia, just 36% of respondents said their biggest readership was offline; in France the figure was 31%; and in the USA the proportion was just 20%. Across Brazil, China, Russia, Europe and North America, marginally more publications have their biggest audiences online.

This trend suggests that the integrated print and digital campaigns which many brands have mastered in the 'developed' markets of Europe and America are likely to have a similar impact in emerging economies.

2 Commerce Commission New Zealand Annual Telecommunications Monitoring Report 2011

ON WHICH FORMAT DO YOU HAVE THE LARGEST AUDIENCE?



SOCIAL MEDIA IN THE NEWSROOM: A QUESTION OF CREDIBILITY

Last year, we asked journalists for the first time about the extent to which they are using social media as part of the newsgathering process. Since then Twitter has repeatedly led to leading news organizations, and even the White House, breaking some of the biggest stories of the day. From the Domedodovo bombing in Moscow, to the 'Arab Spring' and even the assassination of Osama Bin Laden, social platforms have often been first to cover – if not actually shape the outcome of – key events.

There has been a consequential impact on journalists' use of these platforms in their research – though respondents made it clear they are not without suspicion of the veracity of social media sources. In 2011, just under half of journalists said they used Twitter for sourcing stories, and 35% used Facebook in the same way. This year, we did not differentiate between the individual platforms used, but did ask journalists to distinguish between sources they know, and those they don't.

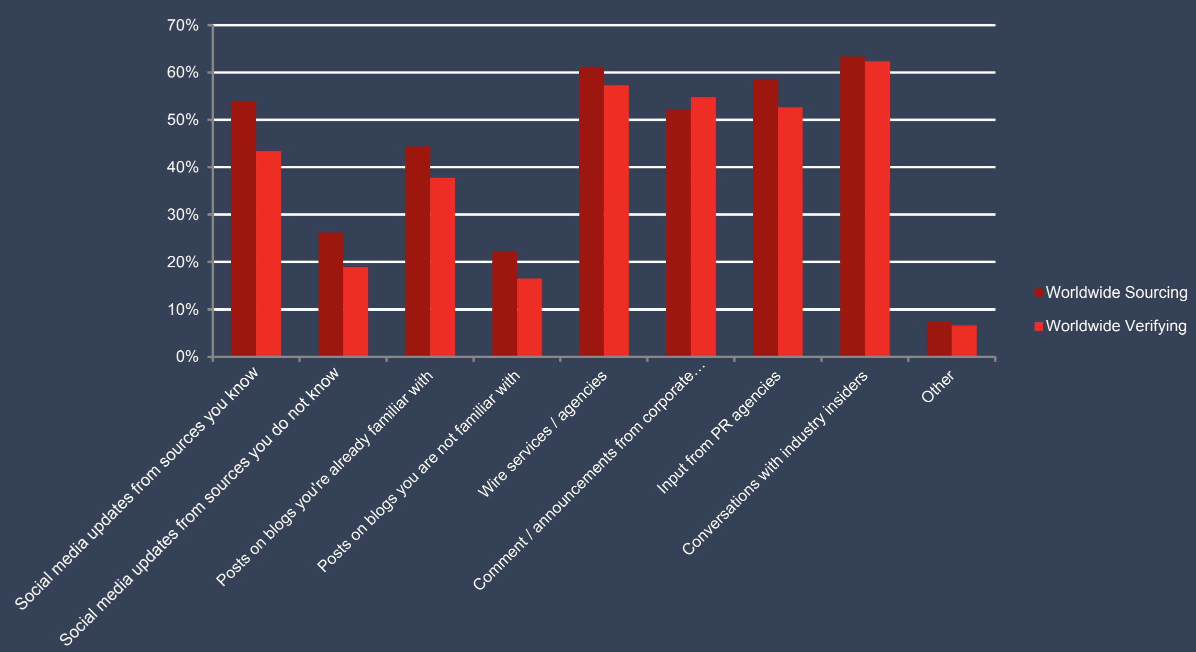
Providing there is a pre-existing relationship, or the source is recognized by the journalist as trustworthy, social media are now a key element of the journalistic arsenal. Globally, over half (54%) of respondents used microblogging updates (e.g. via Twitter, Facebook, Sina Weibo, etc.), and 44% used blogs they already knew to source angles for new stories. North American journalists use these sources more heavily than the rest of the world (62% for microblogs / 64% for blogs), followed by Europe (59% / 53%), and the BRICs (60% / 42%) Overall, the highest use of microblogging for news sourcing was Russia, where a whopping 90% of media surveyed said they used trusted sources in this way. The UK followed closely behind with 75%.

When looking at the use of unfamiliar social media sources (i.e. those they don't know well), a different picture emerges. Only a quarter (26%) of respondents worldwide said they would use microblogs from sources they didn't know, and only 22% would use blogs in the same way. The study indicates reliance on social media falls between 50% and 80% where the source is unknown or unfamiliar; journalists appear to attach far greater importance to trusted sources than the wisdom of the crowds.

This is not to say that tweets or posts from unfamiliar sources will be disregarded out of hand by media. It should be recognised that social media can play a vital role in introducing new sources to journalists. In an interview, one high-profile US journalist acknowledged the role Twitter's 'open system' model played in making him aware of new sources of commentary and points of view[3].

3 HORN, 18 January 2012 http://www.horngroup.com/#/blog/video-interview-with-jon-swartz-of-usa-today/

PLEASE SELECT WHICH OF THE FOLLOWING YOU USE FOR SOURCING AND VERIFYING STORIES YOU WORK ON?

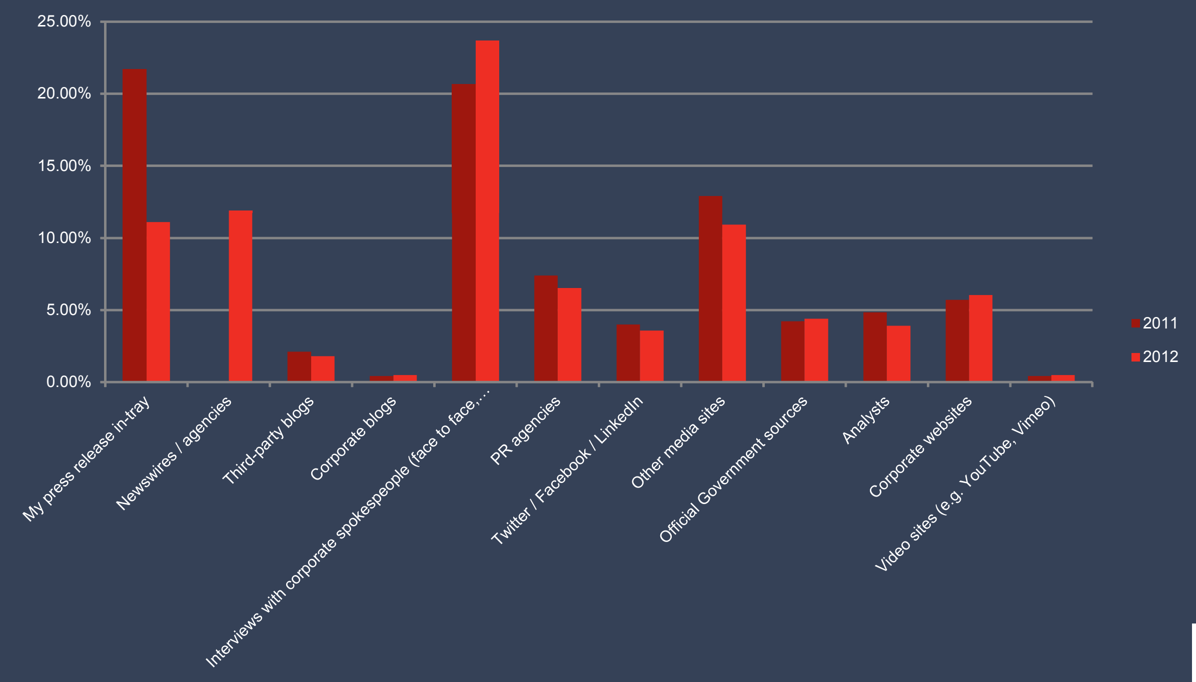


The importance attached to familiar, credible sources in social media is also played out in more traditional means of newsgathering. In the 2011 study, just over half the journalists surveyed said they used industry experts to both source and validate stories. This year, the proportion has gone up to over 60%.

Though the broader range of countries surveyed in this year's study will have skewed the results somewhat, we believe this increased emphasis on credibility is noteworthy and instructive. When it comes to digital and social media, brands cannot expect to break into conversations simply by having a presence in the places where it is happening. They need to develop a clear point of view, and build third party support for it, in order to be recognized as authoritative contributors.

Another key trend from this year's study is the declining preference for press releases as a first port of call for story research. Use of releases plunged from 22% in 2011, when it was the most-preferred starting point, to 11% in 2012. On the other hand, preference for interviews with corporate spokespeople has increased marginally from 21% a year ago to 24% today.

WHICH OF THE FOLLOWING WOULD BE YOUR FIRST PORT OF CALL WHEN RESEARCHING A STORY? (SELECT ONE)



HOW GLOBAL PUBLICATIONS USE DIGITAL ASSETS

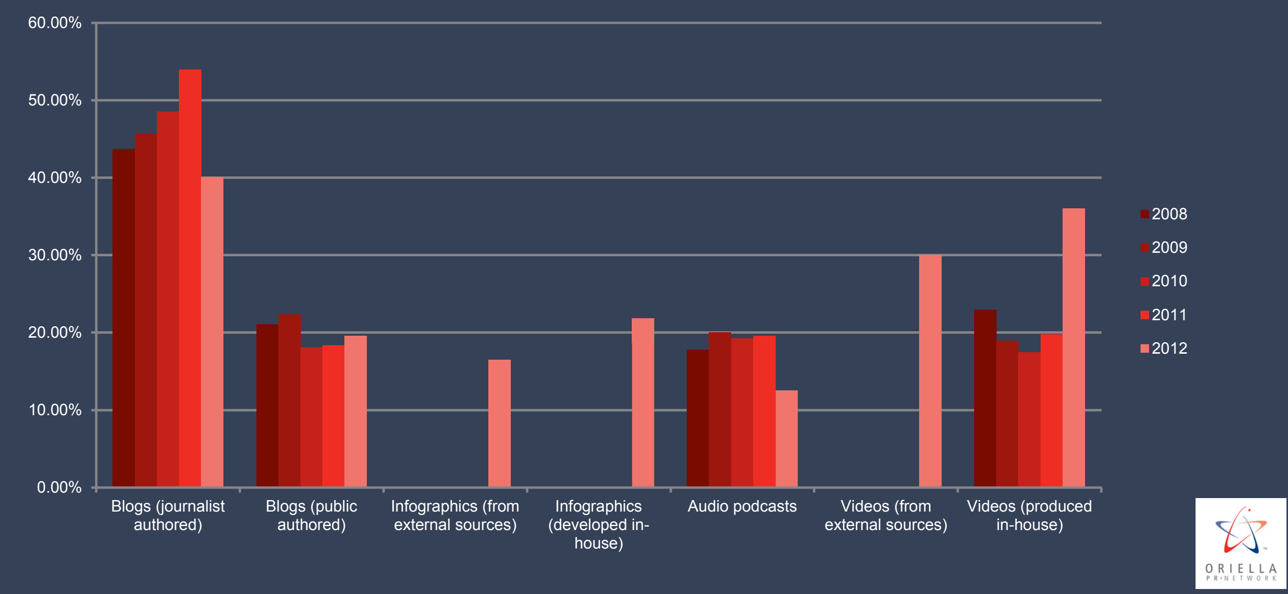
Every year since 2008, the study has asked media which digital and social channels they use in their output - such as videos, podcasts, blogs and Twitter. It is a tricky subject to track year-on-year, given the constant evolution of digital media. This year, for instance, we asked explicitly about Google+, publication-owned Facebook pages and infographics for the first time. For videos and infographics, we also asked media to distinguish between materials produced in-house, and those sourced externally.

Overall, the study evidences a growing use of an increasingly diverse range of content types. In 2008, roughly one fifth of publications said they didn't use any digital storytelling assets, other than their main websites. By 2012, the proportion not using any of these assets had fallen to just 8%.

The study also indicates a possible rebalancing of media resources away from blogging and Twitter towards video. In the 2011 study, 54% of respondents said their titles featured journalist-authored blogs, and 56% highlighted Twitter. This year, these numbers have fallen to 41% and 47% respectively – this trend is also evident if one strips out data from the countries which were not covered in last year's study.

On the other hand, use of video produced in-house has rocketed from 20% a year ago to over 36% in 2012. While video remains a minority pursuit compared to other content types, it is increasingly clear that media owners view it as a valuable means to drive traffic to their sites and boost advertising revenues. Overall, the UK led the way in terms of use of video, with over 60% of respondents saying their organizations used the format. Media in Russia, Italy, Canada and the USA also showed up as leading adopters of video, with a strong preference for internally-produced content.

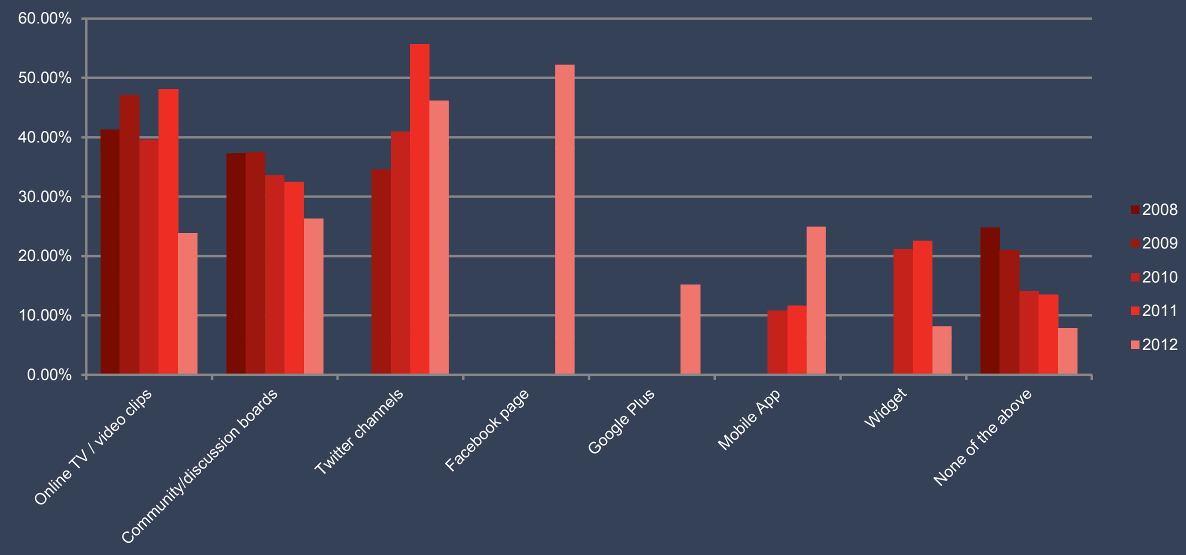
WHICH OF THE FOLLOWING STORYTELLING ASSETS DO YOU OFFER ONLINE?



Also notable in this year's study is the strong interest worldwide in infographics as story-telling tools. Just over one respondent in five (22%) said their publication used in-house developed infographics; 17% use externally-developed ones. While North America and some countries in Western Europe generally showed slightly higher levels of adoption, the most notable statistics are from Russia, where 42% of respondents said their outlet would use internally-developed infographics, and China, where over 41% said they'd use externally-developed pieces.

Finally, adoption of mobile apps has continued to experience sustained growth. Globally, one in four journalists said their publications had a mobile app – with rates highest in Europe and North America. Considering this data alongside journalists' own attitudes to the outlook for their publications (see below), one could conclude that publishers are investing more heavily in mobile as a means to replace dwindling revenues from print.

WHICH OF THE FOLLOWING CONTENT TYPES DO YOU OFFER ONLINE?



SOCIAL MEDIA IN CHINA

The well documented restrictions on Western web platforms in China have led to the emergence of a unique social media ecosystem. With sites including YouTube, Vimeo, WordPress, Tumblr and Twitter completely inaccessible from inside the 'Great Firewall,' the country's bloggers and journalists make heavy use of home-grown services.

Weibos (microblogs) deserve special attention, having experienced levels of growth that would make many Western platforms blanch. Sina Weibo, the largest, grew from 1m users in 2009 to over 300m by April 2012[1], and is growing at the rate of 500,000 new users each month[2]. More than half of China's 'netizens' use weibos and they now rival many established media brands for audience share[3].

Social media is tightly regulated by the authorities, and posts relating to current affairs or politics are strictly taboo. Anything highlighting a scandal or publicizing failings in government policy are swiftly removed (or the offending blogs / profiles suspended altogether). However, blogging in promotion of brands or their messages, and online discussions about technology or consumer trends, are generally quite acceptable.

Media platform	Chinese equivalent	Number of users in China	Growth rate (2011)
Twitter	Sina Weibo, Tencent Weibo, Sohu Weibo	300 million	296%
WordPress, Tumblr, Blogger	Sina Blogs	319 million	Unavailable
YouTube, Vimeo	Youku, Sohu TV, QQ Video, Tudou	325 million	15%

1 ZDNet Asia, 16 May 2012 http://www.zdnetasia.com/sina-weibo-hits-300-million-users-but-costs-rise-62304817.htm
2 EastWest PR, 12 February 2012 http://www.slideshare.net/JimJames/weibo-social-media-phenomenon-in-china-11494746
3 TechNode.com, 16 January 2012 http://technode.com/2012/01/16/cnnic-report-half-china-netizens-are-weibo-users-b2c-becomes-main stream/

ARE JOURNALISTS BECOMING PUBLISHERS IN THEIR OWN RIGHT?

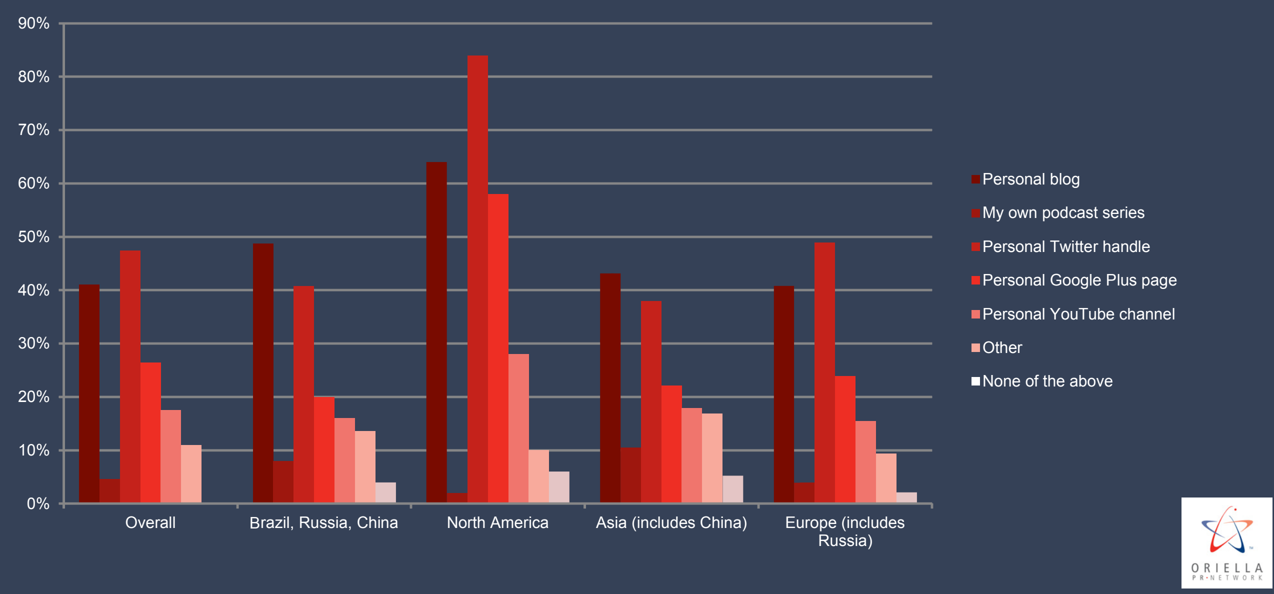
For the first time this year, we asked about journalists' personal use of digital media channels – to see whether they are using these channels as a means to build their 'personal brands' separately to those of their media outlets. In the US, Brian Stelter and Pete Cashmore (*The New York Times* and *Mashable*, respectively) are perhaps the best-known examples of bloggers who have subsequently become mainstream media personalities, though the phenomenon is by no means specific to the US. Virtually every country that took part in the survey has seen key specialist bloggers assume a mantle of authority in the eyes of mainstream media.

Indeed, the popularity of personal blogs amongst journalists in all countries is self-evident. Countries with the most journalist-bloggers were the USA (69%) and Russia (72%), with the majority of countries around the 30-50% mark. One third of the journalists surveyed in New Zealand have their own blogs.

In Europe, the proportion of journalists who blog fluctuates. Germany had one of the lowest proportion of journalists blogging in a personal capacity – just 24% – perhaps a result of that country's comparatively buoyant economy and high job security (just 4% of German journalists believed their title would be taken off the market). The proportions were far higher in countries with more uncertain economic outlooks: Portugal (41%), Spain (42%), the UK (47%) and France (48%).

It is worth pointing out that the survey uncovered very little evidence of proprietors restricting journalists' personal use of social media. This is perhaps indicative of publications realising they can only benefit from their staff building well-known public profiles.

WHICH OF THE FOLLOWING DO YOU OWN, IN A PERSONAL CAPACITY?



THE IMPACT OF DIGITAL MEDIA ON JOURNALISTS' WORKING LIVES

A key objective of the Oriella Digital Journalism Study is to assess the general health of the journalism profession as digital media continually changes the rules of the game. This year, 34% of the journalists surveyed globally said they enjoyed the job more than last year, compared with 14% who enjoyed the job less. This is a significant decrease compared with 2011, when the figure was 44%, but broadly in line with 2010 (34%).

Roughly a third of the journalists surveyed said they are expected to work longer hours and produce more content, with a marginally higher proportion from Europe and North America agreeing with this view compared with Asia and the BRIC countries.

When it comes to the overall impact of digital media as a force for good or ill in journalism, the answer is generally positive. Globally, 37% of journalists agreed the quality of their title's output had improved, compared with 20% of those who thought it had worsened. Journalists in Asia were generally far more positive about the impact of digital media. 58% of Thais, and an impressive 82% of journalists from Vietnam, believed their output had improved thanks to the growth of digital media – which could well be explained by blogs and overseas media increasingly supplanting the role of official news sources.

ORIELLA DIGITAL JOURNALISM STUDY TURNS FIVE: TRACKING CHANGE IN THE MEDIA OVER TIME

The study's core purpose is to track how digital media are changing the journalism profession internationally and to draw conclusions for PR professionals and corporate communicators. Over the course of the study's lifetime we have attempted to move with the times by adding new questions and amending existing ones. We've also ventured a few predictions for the future development of the media and the communications profession. Here are some edited highlights:

In 2008, we found high levels of adoption of audio, video and blogs, and uncovered what we called the '40/40 factor' – 40% of our respondents said more than 40% of their content was online-only. This led us to conclude that the social media news release (SMNR), which was enjoying a good deal of attention at the time, would continue to grow in popularity.

The following year saw Europe plunged into recession and, consequently, focused heavily on the uncertain outlook for the region's media. A third (32%) of respondents in 2009 believed their publication would be taken off the market. 2009's study also underlined the growing importance of Twitter to journalists across the region: one in three provided Twitter channels as part of their digital offering. And SMNRs? Not a mention of them.

In 2010, the commercial outlook for media had improved, but the shift to online had accelerated. Over half (53%) of respondents believed their publication would be taken off the market, and concerns were widespread that editorial quality would be compromised by the multiplication of channels and reduction in resources: 54% of journalists took this view in 2010, compared with 43% in 2009.

2010 also saw us examine publications' monetization strategies – prompted by The Times' adoption of a pay wall in the UK and the launch of the iPad. We found that a quarter of European media were thinking of rolling out paid subscriptions, and the 40/40 factor we highlighted in 2008 had widened: in 2010, 45% of publications interviewed said at least 60% of their online content was new. This continuing shift of resources to online, and the growing popularity of paid-for content, led us to call for brands to give careful consideration to their message, and the means by which they tell their story, over and above the core news release.

Last year we found the dust from the previous two years' economic turmoil had largely settled. Most publications expected audience share and revenues to stay flat or grow, and the proportion of respondents anticipating their publications' closure had halved to just 23%.

We also highlighted the growing use of social media, especially Twitter, as part of the newsgathering process, though the press release in-tray remained the most popular starting point amongst the journalists surveyed. Nonetheless, it was clear that social media had become a key barometer of influence. This, we concluded, presented risks and opportunities for PR people: opportunities to truly own digital media in all its forms, but risks that brands could be lured into negative stories not of their making.

The common factor across all reports going back five years has been the importance of the underlying story behind every campaign and the need to make full use of every discipline – on and offline – to tell it. We believe this remains as true now as it was five years ago.

THE EMERGENCE OF THE 'DIGITAL JOURNALIST'?

The Oriella Digital Journalism Study finds the media in virtually every market more diverse, more creative and more productive, than at any time in the past five years. Journalists are working harder, but they're also working smarter – not taking canned stories in the form of press releases at face value, but using a wider range of assets to convey their narratives. They are querying the veracity of sources, producing more digital materials in-house, and even putting digital media to use for their own personal benefit. These are clear signs of the emergence of a new class of 'digital journalist'. Their expectations of brand communications are, and will be, significantly different to those of their predecessors; however, the end result will be a more robust media sector, clearer communication of brand messages, and deeper impact in the minds of key audiences.

WINNING THE INFLUENCE GAME: FOUR KEY TAKE-AWAYS FOR COMMUNICATORS

1. **Credibility is vital.** Simply having a presence in the right places is no longer enough. The study clearly shows that journalists will gravitate towards sources they trust and respect far more readily than they will speak to those they don't. Social media presents good opportunities for brands and the individuals behind them to build their personal profiles and engage with supporters. With the right support, brands can make the most of them.
2. **Integrated PR and digital campaigning are no longer solely a feature of communications in the 'developed' markets of Western Europe and North America.** The extent to which social and digital media are used across the world's newsrooms suggests such campaigns can work globally. Brands that adopt this approach (albeit with some local tailoring) will be better placed to win in their chosen markets.
3. **Deploy the full range of storytelling assets**. The study has found that global public relations can no longer rely solely on the press release – brand stories must be supported with videos, images, infographics and opinion-led content that sets out a clear point of view. Communications leads should consider adapting their planning processes and workflows to ensure producing these types of content becomes standing operating procedure, rather than the exception to the rule.
4. **Deliver and execute the message locally; monitor internationally**. Given the manifold challenges of international community engagement, we believe the best place to manage this is within target countries themselves. However, procedure, protocol and, above all, monitoring should be managed at a regional or even global level. Real-time tracking and rapid response to emerging issues are vital to protecting corporate reputations.

WITH THANKS TO:

All the Oriella partners and journalists who participated in the study.

METHODOLOGY

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