



Burson-Marsteller media survey

“Trouble is only opportunity in work clothes”

Henry J Kaiser



Burson•Marsteller
Europe, Middle East & Africa

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Introduction

Since the first publicly-targeted radio station in Pittsburgh, Pennsylvania, was licensed in 1920, doomsayers have been predicting the demise of ‘traditional media’. To paraphrase Mark Twain’s quip, however, reports of its demise were greatly exaggerated – until now, perhaps. Just under a century later, the doomsayers’ predictions may be belatedly coming true. The huge seismic shocks battering the industry today mean the rug is not just being pulled out from under the feet of old media, rather the whole floor is caving in.

Traditional media is being battered to death by two unrelated, but equally destructive, global forces: the exponential growth and use of new, highly competitive and ‘disruptive’ digital media formats, as well as a world-wide economic crisis that is quickly killing off what were already outdated and failing media business models. Readers, listeners and viewers – as well as the advertisers and sponsors that want to reach them – are deserting traditional media in huge numbers, lured away by both the exciting new formats and their comparative cheapness in a harsh economic climate.

But the real issue for journalists and media relations professionals alike is not simply the demise of old media. More, it is what form (or forms) of new media will eventually establish supremacy, finally replacing newspapers, radio and even TV – and what will be our respective roles within this new media world. The different ‘new media’ currently vying for supremacy are still young, confused and evolving creatures. In their frenzy for survival, they are

tearing down old structures and behaviours, without having anything, solid or reliable to replace them with. Crucially, they do not yet have the credibility or authority (however tarnished latterly) that was granted the old Fourth Estate.

Is there any hope for the survival of traditional media? Will it adapt fast enough, or manage to scavenge the best of new media ideas and technologies – as well as its incredible energy and dynamism – to turn into a new, stronger, faster version of its old self?

In the US, often a step ahead of the Old World, venerable print titles are closing their doors – and broadcasters are faring little better. According to a recent study in the US, almost 300 newspapers folded in the US during 2009. In addition, eight magazines with circulations of more than a million ceased publication, while 600 staff journalists were laid off from top tier publications.

With this in mind, Burson-Marsteller sat down with 115 senior journalists from all across Europe, the Middle East and Africa (EMEA) to ask them to give us an inside view of their industry in their countries. We wanted to find out whether a similar fate awaits traditional media organisations in our region as in the US. In particular, we wanted to understand in more detail how the economic crisis is affecting the industry, both old and new, the effects of the digital revolution – and how PR and media relations professionals can best adapt to these fast-moving changes and work more effectively with journalists in coming years.

Survey Highlights

For avid media watchers, the Burson-Marsteller media survey confirms much of what they already knew, or suspected, about the crisis buffeting the media industry. What is striking at first glance, though, is the similarity in responses from journalists from all across Europe, the Middle East and Africa.

A common thread across the region, like the US, is the enormous number of journalists being laid off. All across the region, editorial departments are downsizing significantly in response to the economic crisis and the intense competition within the media sector.

Even for journalists lucky enough still to be in full-time employment, their lot is not a happy one: job uncertainty, vastly increased workloads, demands for multi-platform content, less editorial space to put that content into and

(often) moves to ‘dumb down’ the content and editorial agendas in general.

There is a broad agreement among the journalists interviewed that the quality and standards of their trade are diminishing, both as an inevitable result of the financial austerity, as well as being one of the effects of the new media explosion.

There appears to be no consensus, though, about whether the digital revolution in their industry is a good or bad thing. Looking at developments positively, most of the journalists agreed that the advent of new media had given them unprecedented access to information, all at the touch of their fingertips. However, the increased competition – as well as the de-professionalisation of their trade – were certainly all cited as serious causes for concern.

Key findings

THE IMPACT OF THE ECONOMIC CRISIS ON THE WORK OF JOURNALISTS

Journalists' responses painted a grim picture of the impact of the economic crisis on their industry all across EMEA. An overwhelming majority of respondents (81%) said that they were experiencing cost-cutting measures in their editorial teams, which could be directly attributed to the current economic crisis. According to the interviewees, the deepest cuts were being made through decreased use of freelancers (30%), cutting editorial jobs (22%), and making less use of wires and/or picture services (18%).

“ We used to rely more on wire and video footage, such as AP and Reuters, but now we're trying to get as much as we can ourselves so we don't have to pay for that ”

UK

A frequent observation was that when editorial staff was laid off, it was usually the more experienced (and so more expensive) staffers that were fired. And if there were new hires, they were often less experienced (so cheaper) recruits. Inevitably, they said, quality of journalism is suffering as a result.

Journalists that remained following a round of downsizing said they were now being asked to carry out multiple roles, often taking on the duties of former colleagues who had been laid off, as well as having to fulfill extra duties as a result of multi-format requirements.

Within different editorial departments, those producing 'soft content' tend to be suffering more (although in an age where everyone has the opportunity to express themselves, opinion writers seemed to be somewhat ring-fenced). Respondents said that the departments suffering most from cost cutting and lay-offs were Features (28%), News (20%), Opinion (19%), and Business/ Finance (16%).

As a result of cost-cuts in editorial teams, journalists said they had far less time to get out of the office, with 13% of respondents saying they no longer had any time to attend press conferences and events at all; 20% said they devoted less time to research and 20% said they had much less time to create editorial content; finally, 20% also said they now had far less time for face to face meetings with their contacts.

Almost a third of respondents (27%) reported that editorial cost cuts had directly resulted in an increase in their workloads. However, 15% said their workloads had not changed at all, which of course begs the question of what else has gone by the board. Of those who said their workloads had increased, the main effects of this increase were demands for them to multi-task (47%) and being asked to produce more in the same amount of time (41%).

THE ROLE AND EFFECT OF NEW MEDIA

The journalists surveyed painted a confused picture of what they considered the effects of 'new media' on their industry, citing both positive and negative aspects of the digital revolution.

Asked what they thought the biggest threat to high quality journalism was today, most respondents (40%) said it was the hiring of cheaper, less experienced journalists. But also internal cost cutting (34%) and digital media (17%) were cited as major threats.

The majority of journalists said they were now expected to take on multiple roles in their job. These ranged from writing comment pieces in addition to news (27%), covering multiple 'beats' (25%), editing (13%), taking pictures or videos (10%), writing blogs (10%), and responding to the audience/ reader comments (8%). Only 7% of respondents said that they were not expected to take on more than one function.

Perhaps the most significant finding in the Burson-Marsteller survey was how little consensus there was in journalists' attitudes towards digital media and the rising influence of citizen journalism. 19% of the journalists surveyed said they thought that blogs improved journalism, but 27% thought the opposite – that this new media format damaged their trade. Interestingly, 24% believed that there was no effect at all.

“ Search technology means far fewer people here buy newspapers ”

Nigeria

Just over 40% of respondents agreed that search technologies had improved journalism by providing instant research and information that would formerly have taken days to compile. On the other hand, social media was generally considered detrimental to good journalism, blurring the boundaries between fiction and fact – in addition to the poor quality of almost all the content.

It goes without saying that PR agencies need to mirror this new reality for journalists if they are to carry out effective media relations on behalf of their clients. Using the appropriate digital tools – including all the various social media innovations – to convey information to journalists is no longer simply a 'nice-to-do', but instead a 'must'. It is no longer cuts any ice in today's media world – either new or traditional – just to press 'send' on a blanket email with an attached press release.

With so much information now online, when asked about the balance between people's right to privacy and the media's desire for complete freedom of information, 45% of respondents thought the balance 'about right'. However, 31% of the respondents said they thought people's privacy was not sufficiently protected, while 24% thought personal privacy was being protected too stringently.

HOW THE CHANGES IN THEIR INDUSTRY AFFECTS JOURNALISTS' DEALINGS WITH THE PR INDUSTRY

Journalists and public relations professionals alike are facing an unpredictable future as the industry transforms rapidly. Media is experimenting with new business models in its struggle to survive – and cross-media platforms and organisations will almost certainly become even more commonplace than they are now.

Asked how changes in the media sector affected their relationships with PR professionals, the overwhelming majority of journalists (83%) confirmed that PR agencies continued to play a role in their work as either a source of relevant information (28%), a 'lead' for possible stories (27%) or a conduit to relevant sources (28%). Only 17% of respondents said they found PR agencies not to be useful.

“ It has changed a lot the past years. Very few PR-people are unprofessional today. They are better in selling concepts and ideas and the quality is very high. This has led to much better relations between journalists and PR-firms today ”

Sweden

Most of the interviewees said their relationship with PR agencies had changed over recent years: 47% said they dealt with PR agencies more, while only 13% said they had fewer dealings with them. When asked about trust, 18% of the journalists questioned said that, in general, they trusted PR agencies more than they did in the past, while 13% said they trusted them less.

It is tempting to draw a conclusion that the credibility of PR is on the rise among top-tier journalists. Perhaps media relations professionals are just doing their jobs better

than they used to. Perhaps the wealth of information at everyone's fingertips is ensuring that any communication from PR agencies can be instantly cross-checked and verified – and so everyone's game is being raised as a result.

“ Now they understand what journalists want. They even have a better attitude to journalism and understand it better ”

Dubai

Realistically, though, journalists' growing dependence on PR agencies is more likely to be due to their dwindling resources. PR does, however, have a great opportunity to give a further boost to its credibility if it embraces the use of new digital 'evidence-based' communication tools. Journalists will find their increasing reliance on media relations professionals far more palatable if they are given stories which include the 'proof of the pudding' via independently verifiable research.

The journalists added that PR agencies could certainly support their work better in these difficult economic times by being even more targeted in the story ideas they pitched (30%); being more active in offering story ideas or information (26%); providing multi-media content (15%); and operating digitally (7%).

The clear message from journalists is that PR professionals need to devote a lot more energy in their pitches if they are to get the attention of reporters, who are being required to do much more with far less. High quality stories sent to targeted journalists have always yielded the best results – and that is even more the case today. In addition, a variety of smart angles will always yield better responses. Finally, if a journalist does express interest in a story, agencies need to be willing to go the extra mile to help them, so they can easily meet their many impending deadlines.

Newspapers, having half-embraced the new digital era with their online editions, are often in the absurd position of giving away free of charge the same content on the internet that they are charging for in print.



Key findings

In the new media world, content needs to include multiple platforms such as photos, video and audio. Simply pitching a story for print is just not sufficient in this new media era. PR professionals need to be as flexible and creative as possible – trying to bring their stories to life in as many different ways as possible. Journalists working in print, now usually also have to produce web copy or blog posts, sometimes even podcasts or video. Likewise, broadcasters now also have to write blogs or web stories. Media relations professionals who can supply journalists with complimentary material will be those that succeed.

“ I can best be supported by drawing my attention to something that is ‘information’ and not ‘communications’ ”

France

‘The basics’ still remain fundamental to successful media relations in a rapidly changing media environment: pitches need to be relevant and timely; understand the schedule and deadlines of the journalists you are dealing with; keep an eye on bylines, as journalists are changing roles and beats even more frequently than they were before; and ensure that content you provide comes in multiple formats.

The best media relations professionals will mirror the behavior of today’s journalists – in many countries, this

means using mediums such as Twitter, commenting on blogs, or providing information via social media releases. With limited editorial space and even more limited attention spans, shorter is always better.

“ I believe that companies are starting to deal with journalists on their own via the digital world. They are trying to spread their news in a non-traditional way ”

Greece

And with journalists now more and more chained to their desks, relationship building will need to be done mostly online. The principles remain the same, however. Trusting relationships between journalists and PR professionals are still built up over time. Even digitally, PR professionals should be looking to the long-term rather than trying for instant ‘wins’.

As journalists get almost all their background information online, PR agencies and their clients alike will need to ensure that their online footprint and activities complement their new media strategies.

Predicting the future

TRYING TO PREDICT THE FUTURE IS SELDOM VERY SMART (AS THE MEDIA DOOMSAYERS ABOVE MAY EVENTUALLY HAVE REALISED). HOWEVER, A FEW TRENDS CAN BE IDENTIFIED – AND PERHAPS A FEW TENTATIVE INFERENCES DRAWN.

FACTS AND FALSEHOODS

It was once a pre-requisite for responsible editors, before running any investigative piece, that any important information uncovered by their reporters was corroborated by more than one source – and that, as far as possible, any evidence backing up the piece was incontrovertible. Investigative journalism is an expensive business, however, with a huge number of man-hours devoted to the painstaking work required to stand up a story properly. With the rapid-fire deadlines that editorial departments face today, the intense competition to be first with the news, the rapidly shrinking editorial departments with their far greater workloads, investigative journalism appears to be a dying commodity. Instead, with a few notable exceptions, rumour and supposition have become sufficient ‘proof’ to run any ‘exposé’. At a more

mundane level, even fact-checking a press release has become less the norm than simply copying and pasting relevant paragraphs into a reporter’s story.

With almost instantaneous online propagation of ‘news’, inaccurate or false stories are rapidly turned into ‘incontrovertible facts’ – with no possible means of retraction, or legal redress. And once published, unlike before, falsehoods now have an infinite life; carved in cyber-space on the world wide web.

This puts an even greater burden of responsibility on media relations professionals (and their clients) to ensure that the information they give their contacts in the media is factually correct and accurately presented. Equally, it also creates enormous challenges for media relations professionals to correct any misinformation that is published.

SLICING AND DICING THE AUDIENCE

It was once relatively straightforward for PR professionals to target a 'mass audience' for their clients. Today, there are fewer and fewer mass audiences that can be reached through any one media. This has obviously changed the role of media relations, from a scattergun discipline to one instead requiring pin-point accuracy. It often used to be enough to speak to the relevant correspondent of the appropriate mass market media (broadcast or print). Today, however, the most influential media to deal with may instead be a single blogger, writing a commentary or polemic from their bedroom. The difficulty for PR professionals, however, is measuring the ROI of targeting these influential, but highly focused audiences. The old yardsticks – of column-centimetre advertising equivalents, for example – are fast becoming relatively meaningless in this new era.

DOING MORE WITH EVEN LESS

Can editorial departments cut any further? The general opinion – although this was not a question specifically asked – is that there is really not a lot left to trim. So how to save any further costs? Content sharing or syndicated content is a solution growing in popularity with cost-conscious editors, where two non-competing media agree to share content or footage. Obviously, while less reliable than staffers, content commissioned from freelancers or wires services also comes cheaper than from their own journalists. This has a clear implication for the PR industry, which may get a better bang for their clients' buck by cultivating these sources, rather than their in-house contacts as they used to previously.

NEW REVENUE MODELS

The inescapable fact is that traditional media organisations that wish to preserve the high quality of their journalism will have to find and implement new revenue models.

Newspapers, for example, having half-embraced the new digital era with their online editions, are often in the absurd position of giving away free of charge the same content on the internet that they are charging for in print. The rationale behind this business decision used to be that internet advertising would somehow pay for the online content. The current economic crisis has now killed this prospect.

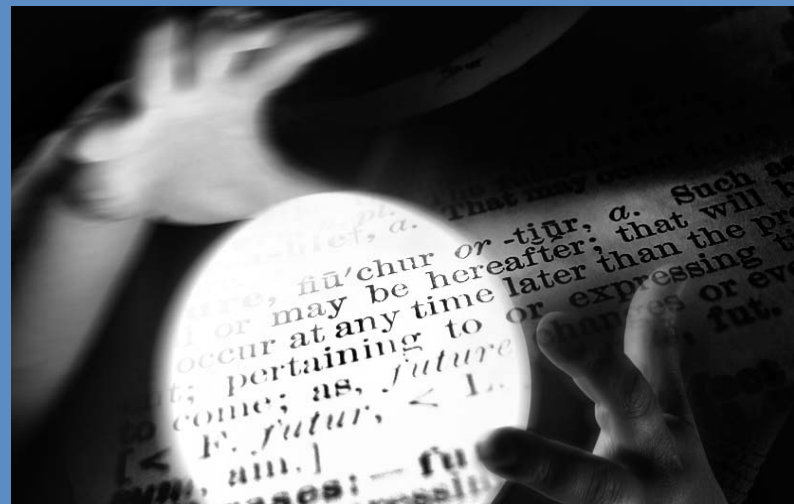
Traditional media organisations today are experimenting with a number of new revenue models to try to preserve their top line, as well as their ability to maintain quality journalism. These range from 'hybrid' mixtures of paid-for and free content; pay-per-article schemes; or even putting their entire content behind a pay-wall.

Rupert Murdoch's News Corporation has recently opted for the latter, announcing plans to charge for all its newspapers' websites. Calling the move a "defining moment for journalism", Rebekah Brooks, chief executive of News International, said: "This is a crucial step towards making the business of news an economically exciting proposition. We are proud of our journalism and unashamed to say that we believe it has value."

To succeed, however, will require that all similar media organisations do the same. While the online content of its competitors remains predominantly free of charge, persuading consumers to pay for quality journalism will remain an uphill battle.

If it becomes commonplace, however, the monetisation of content will have profound knock-on implications for PR people trying to pitch their clients' stories. Prospective stories will not only have to be assessed as editorially interesting by the journalist to whom there are pitched, they will also need to meet new commercial criteria as suitable 'products for sale' to a paying audience. The bar for editorial inclusion will certainly rise significantly – and media relations people will need to jump much higher to clear it.

With almost instantaneous online propagation of 'news', inaccurate or false stories are rapidly turned into 'incontrovertible facts'. And, once published, falsehoods now have an infinite life



Conclusion

Over the next 12-18 months, the media sector will continue to see a wave of new ventures and initiatives – both from entrepreneurs entering the sector, as well as from existing media organisations. They will take advantage of the economic downturn to make – or accelerate – bold moves. The results will almost certainly create further shocks for media organisations that ‘didn’t see it coming’.

While media continues to evolve so rapidly, the future for PR and media relations professionals is hard to read. New opportunities for innovative PR will arise with every new media model or new technology that emerges.

Every facet of media relations is digital today. Undoubtedly, the future will be even more so. The future will not be one of too little information but of far too much. The challenge for media relations professionals will be to offer journalists interesting content that stands out from the mass of other information they receive. And while the medium can never be the message, PR must rise to the challenge of using innovative digital tools to convey their stories instead of disseminating them through the old tried and tested methods. For example, many of the journalists surveyed said they no longer read newswires every morning to set their news agenda, but have instead switched to gathering information and new stories from tier-one blogs and Twitter.

Despite this, from the responses of the journalists interviewed it is evident that the essential skills and best practices of media relations have not changed despite the transformation of the industry itself. Indeed, if anything, they have become even more important than they were.

There will be more need for creative story lines and stunts to gain media attention, and personal relationships with reporters will be more important than ever. The idea that media relations professionals could work facelessly with journalists was always an unsatisfactory one. Returning to old-fashioned reporter schmoozing will be the key to

overcoming the barriers of too much information and too many contacts. But personal relationships will not trump content in the self-interested relationship that exists between PR consultants and journalists. Reporters will continue to favour media relations practitioners who help them do their jobs well, bringing them good story ideas and keeping them on their myriad new deadlines.

All that being said, it is from the strikingly opposing views about new media that we can perhaps draw the most interesting conclusion from the BM media survey. There seems to be complete confusion and totally different interpretations within the industry about the role of new media. In a nutshell, new media is changing so radically and so rapidly that no-one really has any idea how it will be used, how it will evolve and where it will eventually end up.

Among the journalists interviewed, there was a mixture of both fear and attraction about new media and its eventual impact on the industry as a whole.

This presents the PR industry, in particular media relations practitioners, with a real opportunity. No longer do they need simply to work within an existing and long-established media environment – instead they have a real chance to shape its whole future.

Imagine new media as a large motorway whose final planning has not yet been completed, but where the first kilometres are already laid down. No-one is quite sure where this highway is going, nor when it will finally be finished or even if it will ever be completed at all. What is unusual, though, is that we have an opportunity to influence the building process. We can mould and direct this new motorway to try to ensure that it ends up at a destination of our liking.

In the end, rather than just trying to predict the future of media, PR professionals have an unprecedented opportunity to help shape that future instead.

Methodology

The Burson-Marsteller EMEA Media Practice – a group of senior media relations specialists and former journalists from 36 countries across Europe, the Middle East and Africa – developed a brief questionnaire to use in conversations with their senior media contacts. The questionnaire was split into three broad areas of questioning:

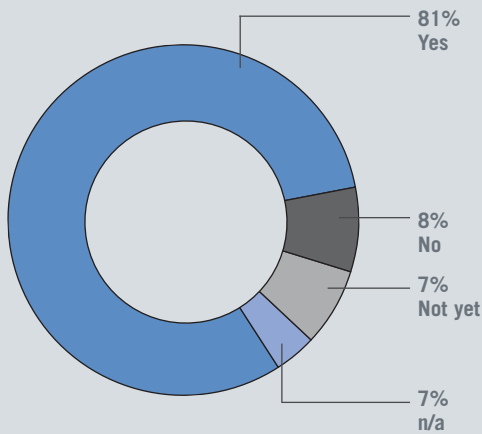
1. The impact of the economic crisis on the work of journalists
2. The role and effect of new media
3. How the changes in their industry affects journalists’ dealings with the PR industry

The ‘interviews’ with journalists were generally carried out face to face, for example informally over a coffee, between September 2009 and February 2010. The questionnaire included 16 multiple choice questions, but there were opportunities for respondents to give non-standard responses where appropriate, as well as open questions with no pre-set answers.

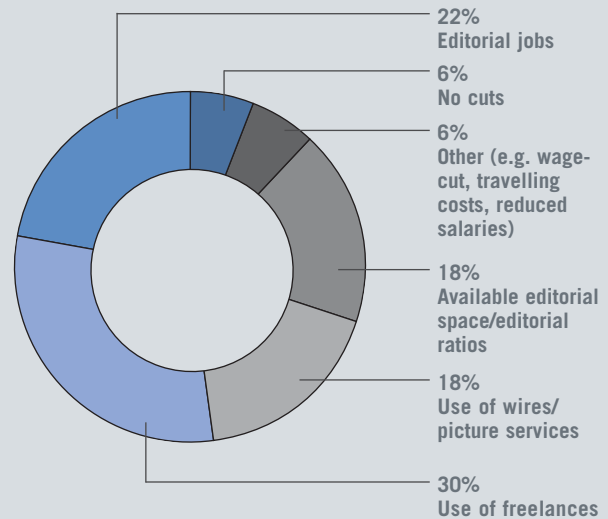
In total, 115 journalists from top-tier media organisations in 27 countries were interviewed. The majority of respondents occupy senior editorial positions in their media organisations: editors-in-chief, editors or senior journalists. To encourage them to speak freely, all respondents were assured of their complete anonymity – the only detail that we reveal about them is the country where they work.

Detailed results

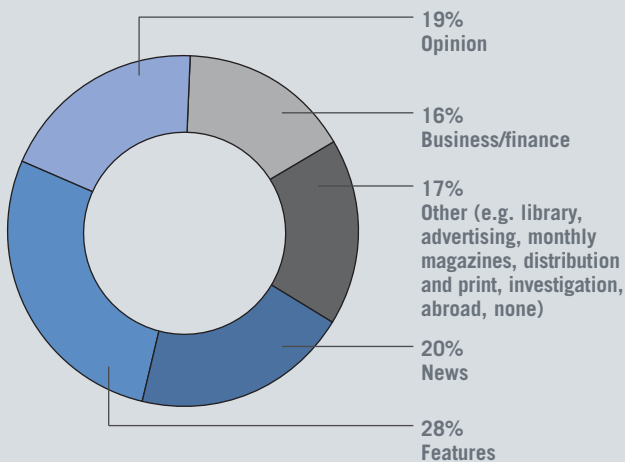
In the current economic crisis, are you experiencing cost-cutting measures in your editorial team(s)?



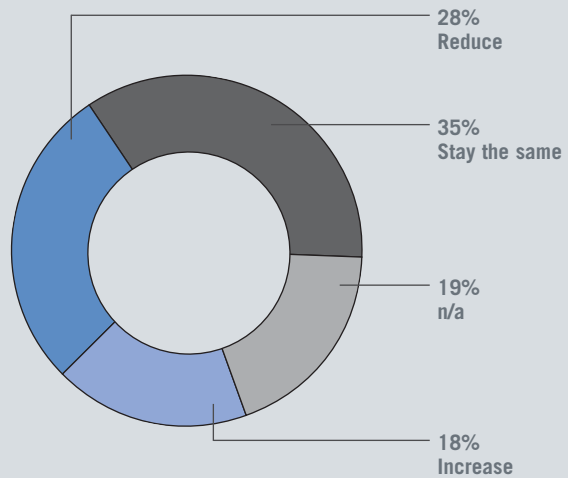
In which areas are costs being cut?



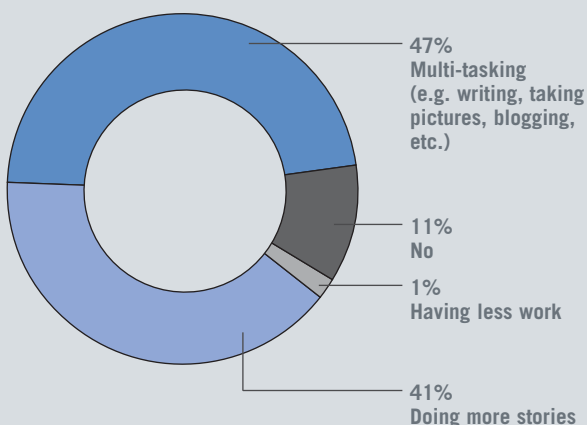
Which editorial departments are suffering most from cost cutting and/or layoffs?



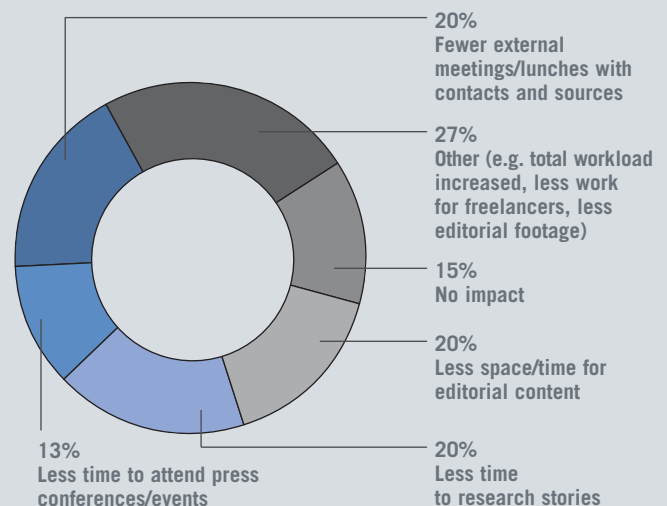
In the next 12 months, do you expect the number of editorial staff to...



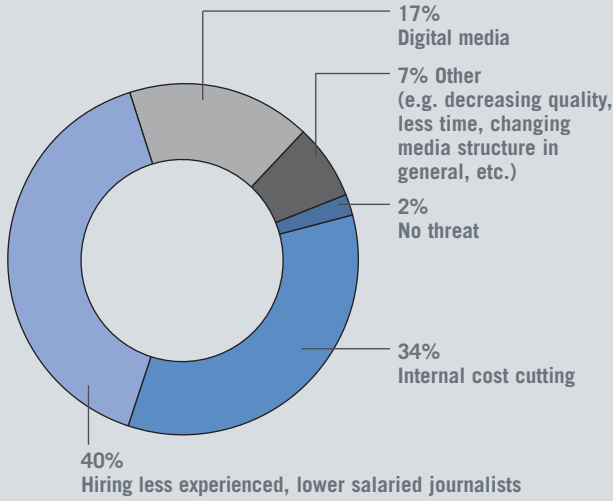
Has your workload increased since the economic crisis started?



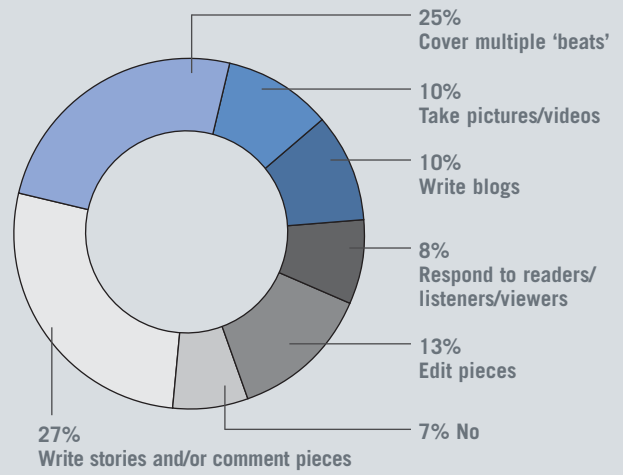
What direct impact will cost cuts have on your editorial work?



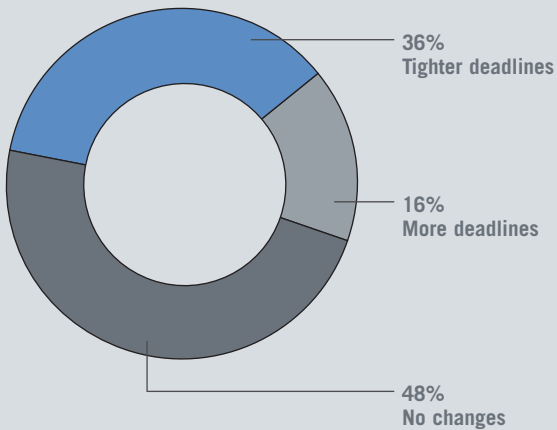
What is the biggest threat to high quality journalism today?



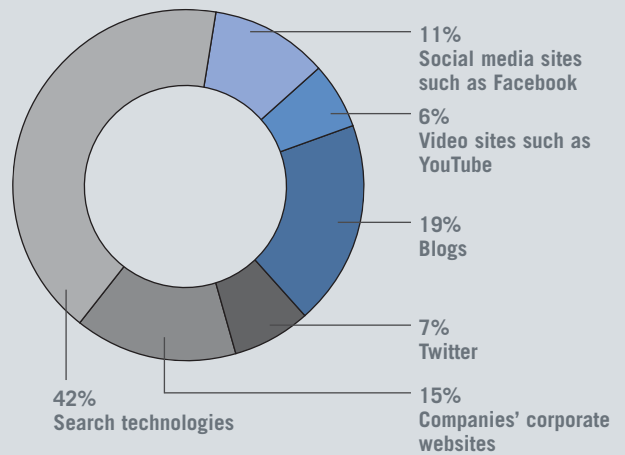
Are you expected to carry out more than one function in your job? If so which?



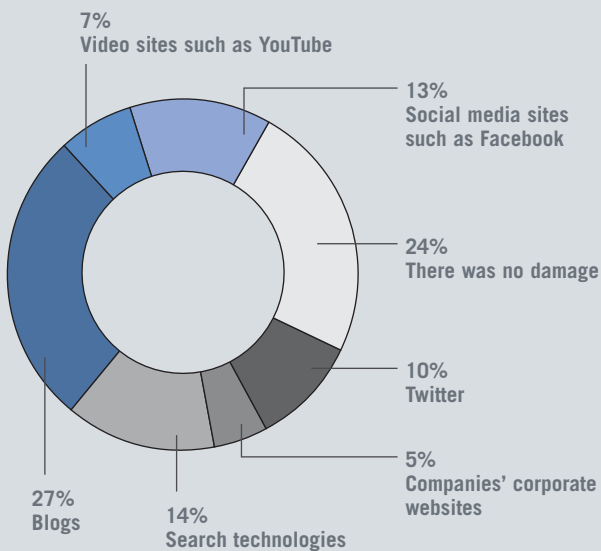
How have your deadlines changed in response to the changing media environment?



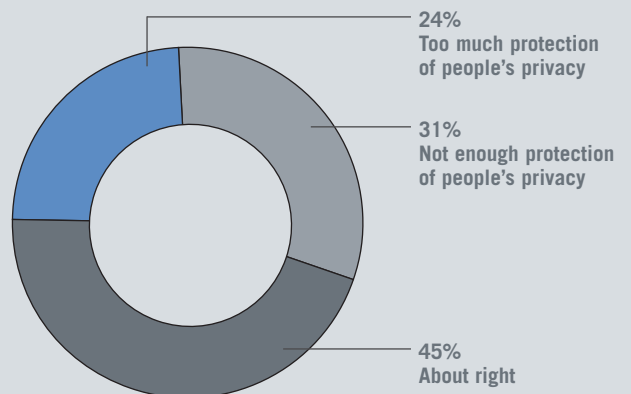
Which new media tools have improved journalism?



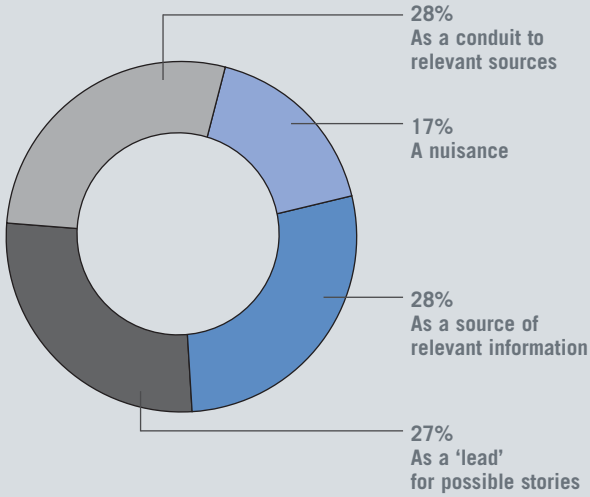
Which new media tools have damaged journalism?



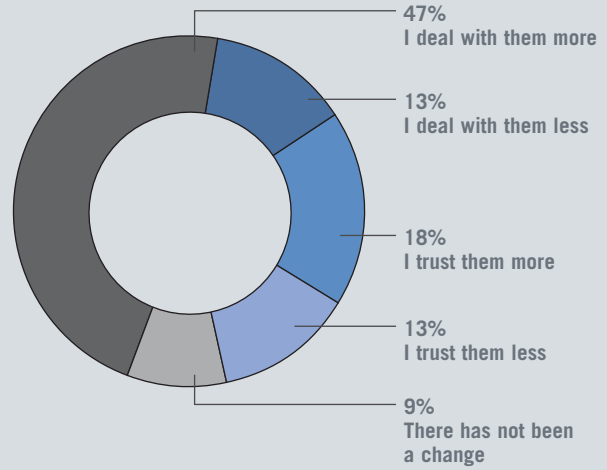
What do you think about the balance between people's right to privacy and media's desire for complete freedom of information?



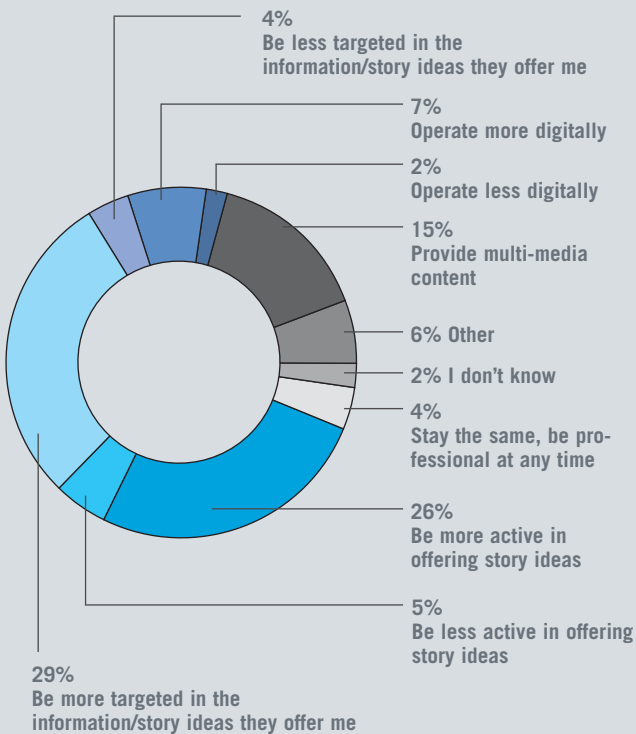
How do you see the role of PR agencies?



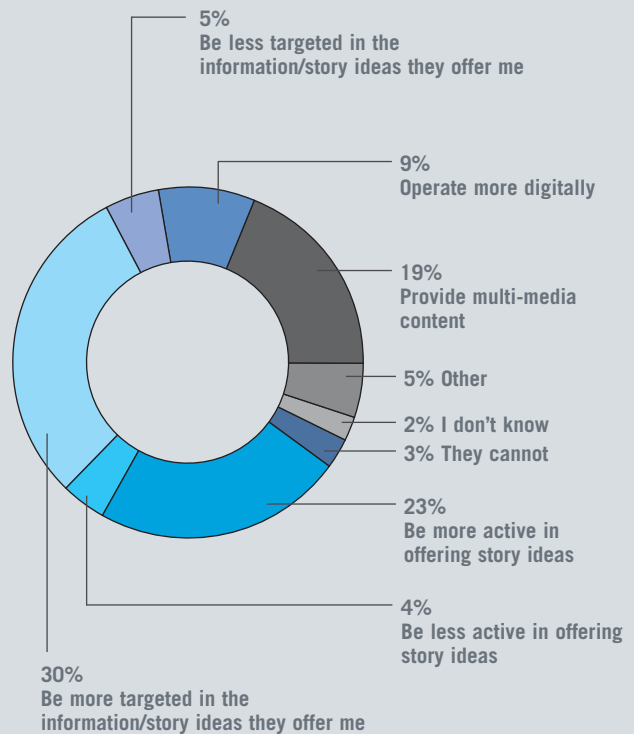
How has your relationship with PR agencies changed in the past few years, if at all?



How can PR agencies best support your work during these uncertain economic times?



How can PR agencies best support your work in the changing media environment?



Contributors

Dennis Landsbert-Noon, Jo Klein, Virginia Mucchi, Eveline Mulder, Willemijn van der Vliet, Jelena Hercberga



Burson·Marsteller
Europe, Middle East & Africa

Burson-Marsteller (www.burson-marsteller.com and www.burson-marsteller.eu), established in 1953, is a leading global public relations and communications firm. It provides clients with strategic thinking and programme execution across a full range of public relations, public affairs, advertising and web-related services. The firm's seamless worldwide network consists of 70 offices and 60 affiliate offices, together operating in 85 countries across six continents. Burson-Marsteller is a part of Young & Rubicam Brands, a subsidiary of WPP, one of the world's leading communications services networks.

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MORE INFORMATION

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