

Shifting Mindsets: College Media Adjusts to New Challenges

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By Bryan Murley
Eastern Illinois University

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Introduction

Every day seems to bring new reports about change in the news industry – most of it brought about by the free flow of information across the Internet. News media organizations are struggling to maintain prominence and relevance in an era of disruption. Newspapers, especially, are feeling this crunch. Three areas point to the importance of this change: revenues, readership, and reporters.

Newspaper revenues are declining across the board. During the first quarter 2007 advertising revenues for newspapers decreased by 4.8 percent from the same period a year ago, according to the Newspaper Association of America (Sigmund, 2007). This is the 12th consecutive quarter of decreasing ad revenues for newspapers. Much of this can be attributed to advertising that has gone online, whether through classified advertising, or the loss of big-ticket advertisers who are seeing the promise of web advertising.

Among the major print components in the first quarter, classified advertising fell 13.2 percent to \$3.4 billion. Retail declined 2.2 percent to \$4.8 billion and national was down 2.8 percent, coming in at \$1.7 billion.

Within the classified print category in the first quarter, real estate advertising fell 14.2 percent to \$953 million. Recruitment dropped 14.3 percent to \$975.3 million. Automotive was down 20.1 percent to \$751.3 million. All other classifieds were down 0.5 percent to \$699.3 million. (Sigmund, 2007)

Indeed, even as overall ad revenues have declined, online ad purchasing has increased by double-digit margins during the same 12 quarters (Sigmund, 2007), which blunted – but did not overcome – the losses in other print advertising categories.

Readership is also declining. The number of Americans who read the newspaper on paper has declined steadily. Daily newspaper circulation peaked in 1987 at 62.8 million, and stood at 52.3 million in 2006, according to the Newspaper Association of America. (NAA, 2006) Meanwhile, the Web audience for newspaper content continues to grow, according to Nielsen/NetRatings data. (NAA, 2007)

Finally, the news industry is hemorrhaging jobs, as major metropolitan daily newspapers – and other media companies – lay off hundreds of staffers, partly in an effort to meet profit margins for publicly-held corporations while revenues from ad sales continue their slide. The layoffs have increased in the first quarter 2007, according to a report by Challenger, Gray and Christmas. “... Media companies announced 4,391 layoffs during the first quarter of this year, up 93 percent from the 2,271 layoffs in the first three months of last year.” (Monica, 2007)

Meanwhile, the industry is trying to reinvent itself online, as news media scramble to make more and better use of their online sites to increase advertising revenue. While online advertising revenue has increased dramatically over the years, it pales in comparison to the income generated by print advertising.

As the Project for Excellence in Journalism stated in their State of the News Media report for 2007:

Journalists have reacted relatively slowly. They are only now beginning to re-imagine their role. Their companies failed to see “search” as a kind of journalism. Their industry has spent comparatively little on R&D. They have been tentative about pressing for new economic models, and that has left them fearful and defensive. Some of the most interesting experiments in new journalism continue to come from outside the profession — sites such as Global Voices, which mixes approved volunteer “reporters” from around the world with professional editors. (Journalism, 2007)

Caught in the midst of this seismic shift in the news industry is the college media outlet. College newspapers – long a training ground for the industry – have not necessarily faced the same challenges as the industry has. Readership remains strong on college campuses, according to surveys (Publisher, 2006). Advertising revenues remain strong. And yet, the educational enterprise – training students for their future in journalism – remains a key component of the college media outlet. With the industry shifting to online delivery, how are college media outlets fairing? Few have asked the question. While Bergland, Bozarth and Thompson explored the convergence efforts of

ACEJMC-accredited journalism schools (2007), there has been no large-scale study of college media outlets and their use of new media technology to help train students for the future.

Over the past two years, the Center for Innovation in College Media has sought to provide some details about how college media organizations are adapting to the online, multimedia environment.

There should be no question that the most important consideration facing college media organizations in the coming years is the integration of new media into their operations.

Methodology

In 2006, Chris Carroll, director of student media at Vanderbilt University, worked with Bryan Murley, then student media adviser at North Greenville College, to compose and conduct a survey of college media advisers about the use of new media in their college media outlets. Carroll obtained a membership list of College Media Advisers, Inc., the professional organization for advisers. E-mail queries were sent to over 700 member e-mail addresses asking advisers to participate in the survey, which was conducted online using surveyMonkey.com.

The survey asked questions about new media use in college media outlets, attitudes about new technology among advisers, and demographic data. As an inducement to complete the survey, one respondent was selected to receive a \$50 cash award after the survey time period was completed.

In spring 2007, Carroll, Murley and Ralph Braseth reproduced the survey, again using the e-mail addresses of members of CMA. The survey instrument was nearly identical to the 2006 instrument, with a modification to the list of technologies used. This change was made to include new technological tools which gained widespread adoption. As an inducement to complete the survey, one respondent was selected to

receive an iPod Nano at the end of the survey period. In 2006, 281 advisers responded to the survey. The 2007 version garnered 188 responses.

Findings

2006

The findings from the 2006 survey were presented at the College Media Advisers Spring National College Media Convention in New York City. Overall, the results showed that college media as a whole was not yet taking full advantage of digital storytelling methods, nor were they taking full advantage of information availability.

Some of the findings:

Newspapers on college campuses were almost universally available online (91 percent, n=240), with radio stations a distant second in availability via a web site (41 percent, n=108). A sizable minority of magazines also had online sites (20 percent, n=54). Campus television stations and yearbooks lagged significantly, with approximately 10 percent of respondents identifying these outlets as having a web site.

Table 1

What student media on your campus deliver content via a web site:

	Percent	N
Newspaper	90.9%	240
Yearbook	10.2%	27
Magazine	20.5%	54
Radio station	40.9%	108
Television station	9.5%	25
Other	9.5%	25
	answered	264

Newspapers also showed a significant lead in devoting staff personnel to their online presence. Seventy percent (n=152) of respondents said their newspaper had a staff person whose sole responsibility was maintaining the web site. Radio was again a distant second with only 17 percent (n=32) devoting a person to the web site.

A majority of newspapers (64 percent, n=148) only updated their web sites on days the print publication was distributed. However, some newspapers (24 percent, n=55) were updating their web sites more frequently than print distribution. Another 12 percent (n=27) updated their web site less frequently than their print publication.

With regards to the economics of content delivery on the Internet, college media were split on the sale of local advertising for Web sites. Only 43.7 percent (n=108) of respondents reported that their media web sites included local advertising sold by campus representatives, while 56.3 percent (n=139) did not have local advertising sales on their web sites.

While student media may have adopted the web as a means of news delivery, most had still not adopted “web 2.0” features that took advantage of multimedia storytelling and community engagement, as seen by the chart below

Table 2

Which of the following web-based features are provided on ANY of your student media web sites:

	Percent	Count
Podcasts	20.90%	39
Weblogs	19.80%	37
RSS Feeds	23.50%	44
Streaming Video	16.60%	31
Embedded Video	9.60%	18
Streaming Audio	42.30%	79
Comments enabled on individual stories	39.6%	74
Discussion boards	33.7%	63
Flash-based applications	18.7%	35
Other	19.8%	37
	Total	187

Regarding technology, college media web sites are split in the model they use to deliver news online. Nearly half (44.5, n=109) of respondents reported that their campus media web sites were hosted on college or university controlled servers, while 42.5 percent (n=104) reported that their sites were hosted on servers owned by vendors

specializing in college media. Since the 2006 survey was completed, the college media web hosting business has been basically dominated by College Publisher, which bought out their main competitor in 2006. Another 17 percent (n=42) used other commercial server providers for their web hosting.

Advisers were also asked a number of questions designed to gauge their perceptions of how college media is adapting to new media challenges.

Respondents felt that new media was at least a “serious” concern for college media outlets. Sixty-three percent felt it was serious enough to rank in their top five priorities.

Table 3

How would you rate your level of concern over college media's ability to transition into the new digital media age?

	Percent	N
Highest priority, warrants urgent attention	13.6%	34
Seriously concerned, among top five priorities	49.8%	125
Mildly concerned, deserves attention when possible	33.1%	83
Not at all concerned	3.6%	9
	Total	251

However, other questions showed advisers were somewhat divided in their outlook. The results showed that a majority of advisers felt college media was “behind the curve” in relation to new media in the commercial industry, but student media web sites were being used adequately to train students for the new media of the future.

Fifty-four percent of advisers felt their student media web site was a useful tool to train students for training students in new media. Only 20 percent disagreed with the statement, but another 25 percent were neutral about the question.

Table 4

Our student media web site is a useful tool to train students in new media technologies:

	Percent	N
strongly agree	18.7%	45

agree	35.7%	86
neutral	25.3%	61
disagree	14.5%	35
strongly disagree	5.8%	14
	Total	241

However, 58 percent of respondents thought that college media was lagging behind commercial media in advancing technology. Only 12.6 percent perceived college media to be ahead of the commercial media in adapting to new media. Another 29 percent felt that college media was roughly keeping pace with the industry.

Table 5

With respect to changes in worldwide media, readership trends and advancements in technology, would you say that college student media:

	Percent	N
Tends to be more innovative and advanced than commercial media	12.6%	31
Tends to be adapting at a pace about equal to commercial media	28.7%	71
Tends to be lagging behind the advances in commercial media	58.7%	145
	Total	247

Advisers were further split on their views about the future delivery platform for college news. A majority (57.5 percent) felt the primary platform for delivery would shift from print to online in college media within 10 years.

Table 6

I believe that primary content delivery for student media will shift from printed publications to online sites:

	Percent	N
In 2-5 years	20.5%	51
In 5-10 years	37.0%	92
More than 10 years from now	28.1%	70
Not in my lifetime	14.5%	36
	Total	249

2007 Survey

The second survey showed a rising level of concern among advisers, but similar findings about student media's use of online tools.

Some of the findings:

Newspaper online presence remained the same in the second survey, however, radio stations lost ground while TV stations gained ground. This year, only 36 percent of respondents reported web sites for their radio stations, while 21 percent of advisers noted that campus TV stations had web sites, up from 10 percent in 2006.

Table 7

What student media on your campus deliver content via a web site:

	Percent	Count
Newspaper	91.2%	166
Yearbook	6.0%	11
Magazine	18.1%	33
Radio station	36.3%	66
Television station	20.9%	38
Other	9.3%	17
	Total	182

Newspapers' lead in devoting staff personnel to their online presence remained consistent, with 72 percent reporting a staff person responsible for web content, almost identical to the 70 percent from 2006. Radio was again a distant second with 19 percent (up from 17 percent) devoting a person to the web site.

Again, most newspapers (58 percent, n=93) only updated their web sites on days the print publication was distributed, a slight decrease from 64 percent in 2006. However, 31.5 percent of the newspapers were updating their web site more frequently than the printed publication, up from 24 percent in 2006. Another 10 percent (n=16) updated their web site less frequently than their print publication.

On the advertising side, there was little increase in the sale of local advertising on campus media web sites. In 2007, 46.8 percent (n=81) of respondents reported local advertising on their web sites, while 53.2 percent (n=92) did not have local advertising on their campus sites.

Newspapers were also showing a willingness to use “web 2.0” features that were neglected in the 2006 survey, including some features that were not included in the original survey, as they were not yet available when the survey was being prepared. As indicated in the table below, adoption of these features jumped dramatically:

Table 8

Which of the following web-based features are provided on ANY of your student media web sites:

	Percent	Count
Podcasts	38.4%	58
Weblogs	35.8%	54
RSS Feeds	35.1%	53
Streaming Video	30.5%	46
Quicktime, Flash, YouTube or other embedded Video	42.4%	64
Streaming Audio	48.3%	73
Comments enabled on individual stories	57.0%	86
Discussion boards	38.4%	58
Sound Slides or other audio slide shows	31.1%	47
Digital mapping	5.3%	8
FaceBook sharing	6.6%	10
Accounts for consumers to submit content	11.9%	18
Other (please specify)	13.3%	20
	Total	151

Technologically, the 2007 survey showed the same split in web site hosting, as 41.3 percent (n=71) reported their campus media being hosted on college or university-owned servers, while 41.9 percent (n=72) reported their web sites were served by vendors specializing in college media. The percentage reporting use of other commercial vendors declined slightly (12.8 percent, n=22).

In the 2007 survey, the number of advisers who thought their student media web sites provided “a useful tool to train students in new media technologies” jumped 10 percent to 65 percent (n=110), while 18 percent disagreed with that statement (n=31). Seventeen percent of respondents (n=29) were neutral on the statement.

Table 9

Our student media web site is a useful tool to train students in new media technologies:

	Percent	N
strongly agree	26.5%	45
agree	38.2%	65
neutral	17.1%	29
disagree	12.4%	21
strongly disagree	5.9%	10
	Total	170

Advisers were less confident in the ability of college media to lead the industry in innovation. Only 9 percent (n=16) of respondents said college media was more innovative than the industry. Another 38 percent saw college media as keeping pace with the industry (n=66). Over half (53 percent, n=94), believed that college media was lagging behind the industry in adapting to new technology.

Table 10

With respect to changes in worldwide media, readership trends and advancements in technology, would you say that college student media:

	Percent	N
Tends to be more innovative and advanced than commercial media	9.1%	16
Tends to be adapting at a pace about equal to commercial media	37.5%	66
Tends to be lagging behind the advances in commercial media	53.4%	94
	Total	176

Advisers showed more concern for the pace of change in their industry. Seventy-nine percent (n=140) rated concerns over college media's ability to adapt to new technology as a serious concern, up from 63 percent in the 2006 survey.

Table 11

How would you rate your level of concern over college media's ability to transition into the new digital media age?

	Percent	N
Highest priority, warrants urgent attention	19.8%	35
Seriously concerned, among top five priorities	59.3%	105
Mildly concerned, deserves attention when possible	18.6%	33
Not at all concerned	2.3%	4
	Total	177

In another sign that attitudes were changing, 68 percent of respondents (n=116) felt that the primary delivery platform for campus news would shift from print to online within 10 years, up from 57 percent in 2006.

Table 12

I believe that primary content delivery for student media will shift from printed publications to online sites:

	Percent	N
In 2-5 years	31.0%	53
In 5-10 years	36.8%	63
More than 10 years from now	21.6%	37
Not in my lifetime	10.5%	18
	Total	171

Demographic Data

2006 Survey

About half (49.2 percent, n=120) of the newspapers delivered broadsheet printed products. Another 40.2 percent (n=98) delivered a tabloid format, while 10.7 percent (n=26) used “tall tabloid” or the Berliner, format.

Responses ranged across the spectrum of delivery dates. Most (53 percent, n=167) were weekly or less. However, 18 percent (n=48) delivered printed publications on a “daily” schedule (i.e., five days per week). Another 18.9 percent (n=50) reported that their newspapers were delivered from 2-4 times per week.

Table 13

How frequently is your student newspaper printed?

	Percent	N
Less often than once each week	24.9%	66
Weekly	38.1%	101
Two times per week	8.7%	23
Three times per week	4.2%	11
Four times per week	6.0%	16
Fives times per week	18.1%	48
	Total	265

The majority of respondents were from public schools (68 percent, n=171), with 32 percent (n=82) from private schools. Also, 84 percent (n=214) were from four-year schools, with only 16 percent (n=40) from two-year schools.

Advisers were about evenly split in their reporting structure, with 42 percent (n=104) reporting to an academic department on campus, and 42 percent (n=105) reporting to an administrative department. Nine percent (n=23) were part of an independent corporation.

Most (67 percent, n=168) advisers responded that advising was only part of their job.

2007 survey

About half (52 percent, n=90) of the newspapers delivered broadsheet printed products. Another 37 percent (n=64) delivered a tabloid format, while 11 percent (n=19) used “tall tabloid” or the Berliner, format.

Responses ranged across the spectrum of delivery dates. Most (62 percent, n=109) were weekly or less. However, 17 percent (n=30) delivered printed publications on a “daily” schedule (i.e., five days per week). Another 20 percent (n=37) reported that their newspapers were delivered from 2-4 times per week.

Table 14

How frequently is your student newspaper printed?

	Percent	N
Less often than once each week	25.6%	45
Weekly	36.4%	64
Two times per week	11.9%	21
Three times per week	4.0%	7
Four times per week	5.1%	9
Fives times per week	17.1%	30
	Total	176

The majority of respondents were from public schools (71 percent, n=125), with 29 percent (n=52) from private schools. Also, 83 percent (n=146) were from four-year schools, with only 18 percent (n=31) from two-year schools.

Again, advisers were about evenly split in their reporting structure, with 51 percent (n=90) reporting to an academic department on campus, and 35 percent (n=61) reporting to an administrative department. Eight percent (n=14) were part of an independent corporation.

Most (68 percent, n=121) advisers responded that advising was only part of their job.

Limitations

The use of a membership list to reach advisers limits the findings of the survey somewhat. There are an unknown number of college media advisers who are not members of CMA, Inc. Also, some members of CMA do not serve in a direct advising capacity on their campuses, and others are not academics, but vendors with an interest in college media. While these individuals did not respond to the survey, their presence diminishes the total number of potential respondents. Finally, on some campuses, more than one adviser is a member of CMA, so there is potential for a small amount of duplication in responses.

Additionally, this was not a longitudinal study, since the same list was used both years to obtain responses, but we did not specifically track 2006 respondents to obtain the 2007 results.

Discussion

After a year of frantic innovation and change in new media technology, college media organizations are adopting new features for their online sites, although adoption levels are still somewhat low. The pace of change is most reflected in the data about college media use of new technologies. Across the board, respondents were more likely to have enabled “web 2.0” functionalities and new multimedia features on their web sites in 2007, as evidenced by the chart below:

Table 15

Which of the following web-based features are provided on ANY of your student media web sites:

	2006		2007		Change
	Percent	N	Percent	N	
Podcasts	20.9%	39	38.4%	58	17.5%
Weblogs	19.8%	37	35.8%	54	16.0%
RSS Feeds	23.5%	44	35.1%	53	11.6%
Streaming Video	16.6%	31	30.5%	46	13.9%
Quicktime, Flash, YouTube or other embedded Video	9.6%	18	42.4%	64	32.8%
Streaming Audio	42.3%	79	48.3%	73	6.0%
Comments enabled on individual stories	39.6%	74	57.0%	86	17.4%
Discussion boards	33.7%	63	38.4%	58	4.7%
Sound Slides or other audio slide shows			31.1%	47	
Digital mapping			5.3%	8	
FaceBook sharing			6.6%	10	
Accounts for consumers to submit content			11.9%	18	
Flash-based applications	18.70%	35			
Other (please specify)	19.80%	37	13.3%	20	
	Total	187	Total	151	

The use of embedded video by college media outlets showed the largest increase. The market for embedded video (as evidenced by YouTube) was not apparent in February of 2006, when the first survey was taken. Yet nearly half of respondents reported that their media outlets were experimenting with online video in the 2007 survey. These results are especially interesting because College Publisher, the major commercial vendor of college-related content management systems, did not implement a way for colleges to use embedded video in the 2007 school year.

While not as dramatic, respondents also reported increases in adoption of several new multimedia efforts. Podcasts and weblogs saw increased usage, although the numbers using these platforms remained below 50 percent. Notably, over half (57 percent, n=86) of respondents reported that their student media were enabling comments on individual stories, a 17.4 percent increase from 2006.

While many respondents reported that their media outlets had not adopted RSS feeds, this might actually be a false result. College Publisher, which serves a great number of college media outlets, has RSS feeds built into their content management platform. Likewise, other platforms that are in use (like WordPress, Movable Type, Joomla, and Drupal) also have RSS feeds built into their systems. The result may indicate that advisers are not aware of RSS, or student media is not utilizing RSS feeds as a way to differentiate their news products.

Finally, our initial 2006 survey did not include a question pertaining to the ability of readers/users to submit content for use on college media sites (so called “user-generated content”). In the 2007 survey, almost 20 percent of college media respondents reported enabling this capability, a number which bears watching in future surveys.

Perhaps the key point of interest in these two surveys was the conflicting views advisers held about their own college media web sites and the college media industry as a whole. While most advisers felt their web sites were adequate for training students for new technology, they were less likely to feel that college media as a whole was keeping

pace with the industry's shifting emphasis. Advisers seemed more confident in the ability of college media to keep pace with the industry in the second year of the study. However, most still felt that college media was lagging behind the industry in terms of adoption of new media. And fewer advisers thought that college media was leading the industry as a whole in moving toward new media.

The results of these surveys show that there is a fertile field of study among college news outlets relating to their use of new media. Much remains to be answered about how college journalists are adapting to new media. Future projects could include in-depth interviews with individual college journalists and advisers about the challenges they face in adapting to new media, a look at how college media outlets use their online outlets to promote new media, and how college media use content management systems to deliver their news content to the readers of their web sites, which include parents of students, alumni, faculty / staff and others interested in campus events.

Further investigation into the raw data of this survey will yield further benefits as well, as this report does not seek to address the rate of adoption of new media as it relates to circulation, publication frequency, or other technological issues. Those results await future study.

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