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New Points of View—Cautious Optimism and a Transition in Progress

Douglas S. Griffen is a Consultant for INNOVATION and the primary facilitator of the INNOVATION MEDIA Computer Assisted Brainstorming Sessions (CABS). This article is a based on a survey conducted by Mr. Griffen in the Spring of 2014 to gain new insights and points of view from WAN-IFRA members on their outlook on the newspaper and media industry. The survey, consisting of 30 questions (mix of open ended responses and specific assessments) was conducted using the WIQ interactive platform (www.gowiq.com) and we are appreciative of their support of the WAN-IFRA Conference and the 2014 INNOVATION World Report. The survey is qualitative in nature and not 'projectable', but the style of the survey essentially yielded 50+ *in-depth interviews* from a broad set of WAN-IFRA members.

This document is an analysis of the survey and includes the full survey responses as part of the document package. Highlights of the survey can be found in the 2014 Innovations in Newspapers World Report (pages 92-95) that was distributed in Torino on June 11.

Survey Snapshot: WAN-IFRA members from North America, Latin America, Europe and Asia/Pacific provided new insights and perspectives on the news and media industry today and where they see the industry headed in the next 5 years. There is a *cautious optimism* that the industry is regaining its balance and growth after a challenging recessionary period and a long transition to integrated media platforms. While many issues and challenges remain, the survey respondents indexed the optimism for the industry and its outlook in 2014 at 54 (1-100 index where a '1' means completely pessimistic and a '100' means completely optimistic) and that index climbs to 58 when assessing the industry and its outlook for 2019. While we might collectively want to see that *rate* of optimism increase, we are pleased to see the *direction* it is heading.

The Positives vs. The Negatives: Where Are We in 2014
We asked our survey participants to provide their *points of view* on where the industry is in 2014—the positive trends and aspects (what's in our favor) as well as the negative trends and aspects (what's in our way). This was a very balanced assessment and the following is a summary of some of the key themes:

The Positive Trends and Aspects—What's in our Favor

- ✓ That news and information still matter, everyone wants to be connected and informed;
- ✓ Common branding across platforms has been well received by readers. A sense that the various platforms each have their time and function;
- ✓ The sheer growth in demand for digital content and digital advertising. Digital reach is creating a new level of journalistic reach;
- ✓ The general recovery of the economy (though a very unbalanced recovery globally);

- ✓ Consumers are getting more accustomed to pay for content models. The financial model creates accountability for high quality, relevant and customized content;
- ✓ New leadership is entering media organizations in terms of age, perspective and non-media backgrounds;
- ✓ A trend in more serious journalism--in depth stories, analysis and investigation--that is reinforcing the credibility of mainstream media;
- ✓ The massive move by consumers to mobile technology and the significant increases in the quality of news apps that are available to the consumers;
- ✓ New innovative formats and methods for storytelling that carry us into a new level of reader engagement through video, visualizations and full multi-media;
- ✓ Printed copy seems (for many) to have stabilized and is a valid component of the platform mix. The ability for the platforms to reinforce each other creates a sum larger that the pieces.

"The most positive trend is that now that technology is becoming accessible to everyone, content and creativity are becoming more and more important. It's excellent news for media companies. In most countries newspapers have leading online properties with their news sites. There's more to come."

"More people are reading newspapers than ever thanks to digital access and distribution. Quality journalism can have an immediate and wide-spread impact like was never possible in the past."

The Negative Trends and Aspects—What's in our Way

- ✓ The continued loss of print advertising as a baseline revenue component;
- ✓ Many are still trying to find the right way to monetize digital media. We know the consumer is becoming more accustomed to pay for content, but *where* those boundaries are and what will incent the sustainable subscription model is still largely trial and error in each brand and market;
- ✓ While innovation is occurring there is still a resistance to change at the pace needed;
- ✓ A tendency still to sensationalize news which creates a negative impression among readers. Where's the real news?
- ✓ Increases in costs for printing and distribution of hardcopy paper. In a weak economic recovery this creates tremendous pressure on margins;
- ✓ While digital growth is encouraging it comes with the prospect of *small digital attention spans.* Optimizing digital content (and its associated advertising) is a constant effort;
- ✓ Because digital reach is so compelling and immediate, it draws in new and non-traditional competitors that simply play the game differently;
- ✓ Social media is the 'great distracter' to mainstream media and is a no-cost alternative to traditional print media;
- ✓ Newspapers still branded by many as a 'declining industry'.

"Still need to combat perception, particularly among younger readers, that online content must by default be 'free'. If digital paywalls succeed, it will not be immediate for most media."

"Continued reliance on a deeply backward industry: advertising. Gallons of ink have been spilled lamenting the news industry's inability to adapt to a digital reality, but it is in fact the advertising community that continues to be far to enamored with its existing business structures."

In our survey we asked our participants to compare the positives vs. the negatives and once again we see a cautious optimism that the positives are beginning to outplay the negatives:

Q3: All things considered for our industry 2014, do the positives outweigh the negatives or the negatives outweigh the positives?

No.	Items	Times Selected
1.	The positives for the industry somewhat outweigh the negatives	34%
2.	The positives and the negatives are fairly equal and balance each other out	23%
3.	The negatives for the industry somewhat outweigh the positives	21%
4.	The positives for the industry far outweigh the negatives	10%
5.	The negatives for the industry far outweigh the positives	9%

While the most frequent response was that the positives somewhat outweigh the negatives, it's not yet a majority response but more than 50% indicate that we are at least holding our own and a third suggest that positives have moved ahead. It's a step in the right direction of a long journey.

Issues in Innovation: Where the Industry Needs to Head
The good news is that innovations are alive and well in the industry. Innovation in our industry is not optional, it's a mandatory process to re-think and re-invent the industry. The very process of innovation draws in new thinking, talent and leadership into the industry. While the 2014 World Report on Innovations in Newspapers will detail many of the excellent innovations that are occurring, we asked our participants to specifically identify where our industry needs to be *more innovative* in the next five years:

- ✓ Further segmentation of audiences and customizing content that is highly relevant to these audiences;
- ✓ Innovations in advertising, completely rethinking the role of the combined news platforms to reach and engage audiences on products and brands they value. Create a far more interactive experience;
- ✓ Further developing the models and experiences to monetize content;
- ✓ Explore more niche-media areas where digital reach can product sustainable revenues;
- ✓ Apply big data and analytics to the industry, a better insight-driven model about consumers, preferences and trends;
- ✓ Innovations in attracting younger audiences to all platforms. Create authentic content that is relevant to them on a daily basis;
- ✓ Adapting our journalistic style to the new media channels and the consumers of those channels;
- ✓ Innovations in website design and experience;
- ✓ Give editorial departments better tools and systems to tell a compelling story.

"Building audience. Whether supported through advertising or subscriptions, we need to understand where tomorrow's readers are today, find them, and convert them. This means new products, new information services, and lots and lots of experimentation."

"Think different and follow the customer on his media journey. Do not create and wait for the customer to seek you out. Seek them out and let them discover."

Digital Access to Content: The Smartphone Has Taken The Lead
One of the fascinating findings on our survey is the leap that the smartphone has made for the consumer in the access to news and information. Our participants indicate that in 2014 access of news and information by smartphone is 38% compared to 37% for laptop/desktop computers and 23% for tablet devices, but that access by smartphones grows to *54%* in the next 5 years. The table illustrates the 2014 and 2019 access points for digital content:

Q7. As you think about digital access to content in 2014, how would you say that consumers access news and information from newspaper/media sites across the following 3 device types?

No.	Idea	High	Low	Avg.
1.	Access by Smartphones	70	15	**38**
2.	Access by Laptop/Desktop Computers	70	10	**37**
3.	Access by Tablets	50	5	**23**

Q8. As you think about digital access to content in 2019 (five years from now), how would you say that consumers access news and information from newspaper/media sites across the following 3 device types?

:

No.	Idea	High	Low	Avg.
1.	Access by Smartphones	85	25	**54**
2.	Access by Tablets	55	5	**28**
3.	Access by Laptop/Desktop Computers	50	0	**17**

The growth in smartphone access for news and information *and everything else* has been astounding. It's not only the proportional access but the sheer volume and penetration of the smartphone of consumer everywhere. This race—which many thought would be a two horse race between tablets and smartphones—appears to be over. The smartphone took the lead with a set of likely factors:

- ✓ The screen size and quality has significantly increased. The development of the iPhone and Samsung Galaxy have literally made one of the original smartphones—the Blackberry—obsolete;
- ✓ The quality of the app and a more intuitive user interface has engaged audiences. News apps are easier to download, easier to navigate, compelling in terms of rich media, easily linked to other content sites;
- ✓ The 'always-on' nature of the smartphone connection generally means no searching for wi-fi. I click on my app and I am informed;
- ✓ It's *socially acceptable* to be checking your smartphone everywhere you are. It creates a connotation of a connected consumer;
- ✓ The large scale competition among the smartphone makers and the networks that support them have continued to drive down price while creating a premium on innovations. Can you imagine what a smartphone will be able to do in five years and how that capability for supporting news and information delivery will transcend what we are doing today?

We were also curious to see if our participants explicitly felt that the tablet had delivered on its high expectations of impact to the industry:

Q9. Overall, had the tablet had as much impact for the industry (access to news/information, pay for content support, application development, market expansion, etc.) as you would have expected?

No.	Items	Times Selected
1.	No, it has FALLEN SHORT of my expectations for the industry	(54%)

2.	Yes, it has MET my expectations for the industry	(38%)
3.	Yes, it has actually EXCEEDED my expectations for the industry	(7%)

Over 50% indicated that it had *fallen short* and only 7% indicated that it had exceeded their expectations. We were—as an industry—somewhat 'romanced' by the device. At the end of the day, it was less about the device and more about what platform could deliver the *content* in a compelling way. Here are some additional insights from our participants:

- *"I think smart phones have made it so easy to quickly access news/information simply by reaching into one's pocket, purse or what have you. The tablet is not so accessible. The ability to connect a keyboard easily to a tablet will displace the use of traditional laptop/desktop computers."*

- *"The scenario of tablet usage veer more toward casual reading & entertainment instead of news consumption."*

- *"It meant we are competing with totally different services: games, mail, music, social media, et cetera. Reading a newspaper, readers isolate themselves from the world, reading a tablet, readers have impulses to do something else constantly."*

- *"…Tablet access is still mostly done through the mobile browser instead of dedicated apps. Although this is fine in terms of traffic, the experience is not quite the same. A dedicated app is a cleaner, more magazine like experience."*

- *"The industry did not make it happen. We decided to just move the newspaper in to the tablet. We still work with the same way of telling a story, on pages, text and pictures. We need to re-think and fully use the opportunities special for the tablet."*

The tablet is not going away. Our participants indicated that 5 years from now the tablet will account for more than 25% of the digital access. But it clearly must come down in price and the app set must be developed to truly optimize the device and the experience. The larger dynamic is what is occurring in the technology industry itself. It seems that tablets are getting smaller and smartphone screens are getting bigger. Smaller tablets are less likely to replace the utility of a desktop/laptop computer. We suspect that the consumers will sort all of this out for us over time.

Leadership Transition: New Players in the Industry

We asked our participants about leadership transitions in the industry, specifically the 2013 sale of the Washington Post and, generally, about other leadership transitions in 2014 where non-traditional leaders could be placed in power. Overwhelmingly (nearly 70%) said that the sale of the Washington Post to Jeffrey Bezos was a *net positive* for the industry and the same margin (nearly 70%) expected more of these kinds of leadership changes in 2014:

Q11. On October 1, 2013 the Washington Post was sold to Jeffrey Bezos of Amazon.com after four generations of family ownership by Donald Graham at the Post. Many consider this is be a landmark event for the industry and a 'changing of the guard'. How do you assess the change in ownership?

No.	Items	Times Selected
1.	This is a net positive for the industry	(69%)
2.	This is a non-event for the industry, just an ownership change	(16%)
3.	This is a net negative for the industry	(14%)

Q12. Regardless of your assessment, do you anticipate seeing other ownership changes of major media organizations in 2014 by non-traditional players?

No.	Items	Times Selected
1.	Yes	(69%)
2.	Not sure yet	(23%)
3.	No	(7%)

It suggests that we are placing a welcome mat at the door of the industry for new leadership. We are willing to admit that new leaders do not have to be born and bred in the industry, but the must possess a compelling vision about how consumers want to learn and be engaged in the future. This idea of our industry being a net attractor of the best and brightest leaders should be viewed as an important step in the industry transformation.

Industry Trends: Place Your Bets
In a futures section of our survey we asked our participants to indicate the extent to which they agreed with--or disagreed with--a set of ten industry trends. In each case we used the same assessment scale:

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

The following table is the summary of the trend areas:

Issue	Idea	Std. Dev.	Avg.
1.	THE TREND IN PRINT: The decline in traditional newspaper print has leveled off and will be stable or see even modest growth over the next 5 years on a global basis	1.1	2.6
2.	PAY FOR CONTENT: Consumers will accept the pay for content model as the norm for in-depth, selected or customized digital content for newspapers	1.1	3.7
3.	INTEGRATED NEWSROOM: By 2019 nearly all newspaper organizations will have moved to an integrated newsroom where traditional print and digital/specialty media staff and operations will share space, processes and content	0.8	4.4
4.	YOUNG JOURNALISTS: The journalism profession will experience a rebirth as a very attractive career path for young professionals due to the technology changes, new media formats, and new leaders/organizations in the industry combined with the traditional values/role of journalism	1.0	3.7
5.	WEARABLE TECHNOLOGY: The continued development of 'wearable technology' (for example Google Glasses and Samsung smart watches) will create a new and important opportunity for media/news to be delivered real time in entirely new ways	1.1	3.5
6.	PRESS FREEDOM AND JOURNALIST SAFETY: The International Press Institute reports that 2012 and 2013 were the deadliest years on record for journalists with 132 killed in 2012 and 117 killed in 2013.	0.8	3.8

	Despite good efforts from many media organizations and governmental agencies, this is a trend that will continue at the current or even higher levels over the next 5 years		
7.	CONTENT TRANSFORMATION: The almost endless appetite for customized content (news, information, trends, lifestyle, community connectedness, etc.) will transform current newspaper companies into content aggregators/providers that enable them to compete with some of the most powerful technology and social media companies in the future	1.2	3.6
8.	LOCAL STAYS DOMINANT: The desire for readers and audiences to be aware of and engaged in their local communities will continue the need for newspapers and their media platforms to be THE SOURCE of local, relevant and timely information	0.8	4.2
9.	THE ROLE IN SECURITY AND PRIVACY: Newspapers and their media companies will emerge to play a more significant role in the definition/boundaries of information privacy and security based on the recent high profile incidents such as Edward Snowden and the NSA leaks and a need for a non-political set of guidelines	0.8	3.7
10,	NEW LEADERS: The combination of a retiring set of current leaders and the attractiveness of newspapers and their large audience reach will create an influx of high profile new leadership into the industry that will have a profound impact on the direction of the industry for the next decade	0.9	3.7

Where do *you* stand on each of these issues? What are the implications for the industry? For *your* organization? Our survey was only a small sample size—it would be interesting to see if these assessments are fairly consistent among our industry leaders in total. What our survey indicated that we *did agree on* were the following:

- ✓ Integrated newsroom is the defacto standard in the future;
- ✓ Pay for content is becoming more and more accepted;
- ✓ Local is *still* the dominant theme for relevance;
- ✓ Young journalists are headed our way in increasing numbers;
- ✓ There is a fundamental leadership transition occurring in the industry;
- ✓ Sadly, our journalists will continue to be in the line of fire for what they do.

It looks like we will continue to debate the role of the printed newspaper for the future. Every 5-10 years we seem to declare that it will be gone in 5-10 years, but it proves to be far more resilient than many would have thought. And the fundamental role of our media companies will change—we may not know exactly what that horizon looks like, but we are becoming more comfortable in expanding the boundaries. The role of technology--consumer technology as well as business/industry technology--can be a game changer.

Closing Thoughts: How the Role of Newspapers/Media is Changing

We tapped into some powerful and persuasive *points of view* in a final open question when we asked our participants to think about the fundament role and *purpose* of our product in the future:

Q28: How will the fundamental role of newspapers/media CHANGE in the next five years? What do you see as the PURPOSE of newspapers and media in 2019 as you consider the changes in technology, consumer trends, economics and global affairs?

Here are a few of the responses, a good starting point for a compelling and important dialogue about our future impact:

- “The fundamental role of newspapers/media is fragmented and market specific from one side of the globe to the other, as are the purposes of newspapers and media. Change is constant. What is important is not what changes, but what has not, does not and will not change: the fact that it is much easier to shut down a web site or a broadcast channel than it is a well hidden or well-protected printing press. Therein lies the truth about the purpose of newspapers and media yesterday, today, and in 2019 (and beyond).”
- “The smart media and newspaper companies embrace the wisdom of the crowd and use their audience to help on stories. The will become moderators of sorts, allied to a return to the old values of good journalism - exposing what some people want to keep hidden. Adding context and depth will be as important as finding and reporting of stories.”
- “Newspapers will remain as a vital source of well-informed, well-researched purveyors of content. What will change is how these benefits will be distributed and consumed, and the degree of personalization available to make the content as relevant as possible to the consumer.”
- “Users are increasingly mobile, with higher requirements in matters of content selection. As specific content on demand. They're not willing to pay for something they don't need. Our role will be to give them the opportunity to select what when where.”
- “The media industry will always have an important role in telling the story. Readers will continue to appreciate get content in a package. We tend to get smaller and smaller worlds when mainly reading what other people share in social media. Content made to be shared and often not telling the important stories. I believe that we will see a shift and going back to want someone to give us the news for real.”
- “I think the role will fundamentally change if it hasn't already. The New York Times recently released "NYT Now" with a slogan like: News at the speed of the digital age. I'm sure this make sense, but also raises the question of the purpose of news in the first place. Can we really get the story "at the speed of the digital age"? What do we lose in going to a one or two paragraph piece from a more in-depth article?”

Our participants also valued the role of WAN-IFRA in continuing to be the key industry convener. As one of our participants wrote very simply, our conferences and gatherings should enable ‘people in the industry to share experiences and learn from each other’.

We hope that you enjoyed the experiences and insights from our participants in this set of survey questions. They are neither right or wrong, they are simply *new points of view*. We trust that you will continue this important debate about the future of the industry.

** END OF ARTICLE ANALYSIS **

2014 Innovations in Newspapers World Report Outlook Survey

Instructions: Please respond to the following survey questions. There will be an instruction at the end of the survey on how to submit your responses.

Questionnaire Results
55 Responses

Industry Perceptions

1. As you think about the state of the industry for Newspapers and Media in 2014, what are the MOST POSITIVE trends and aspects? What's in our FAVOR as an industry in 2014?

No.	Idea
1.	News and media still matter, everyone wants to be connected and informed. As important as social media is, mainstream media is what we count on to understand our communities and our world. The level of digital content is impressive as media organizations have developed compelling news/information apps for tablets and smartphones. Younger professionals are taking leadership positions in our news and media organizations and are making a difference.
2.	The acceptance of our readers to a common brand across all media newsprint web page tablet and phone, an acceptance that all forms of the brand have a time and function and they are happy to swap between them with in the brand
3.	Growing demand of digital content.
4.	The first and foremost thing is that the COMING BACK OF PRINT. I am very happy to see the NEWSWEEK back in its PRINT format. The digital segment of news portals now will seek INNOVATIONS for its survival. And that is going to be the MOST POSITIVE trend of the year.
5.	Increase in quality of newspapers. Despite cost cutting in all areas the quality is still high.
6.	Small improvement in economic trend is reducing the sharp decline in advertising and readers. Migration to Digital and Mobile picking up, might make them significant for revenues.
7.	1) Social networks 2) Digital advertising increase 3) Digital subscriptions
8.	Economy is recovering, users will pay for digital news
9.	Emerging technologies for automated, data-driven journalism; ongoing economic recovery in the USA and Europe.
10.	Most of the front line vernacular dailies registered positive growth in India. Advertiser’s outlook on print media also shows positive in India & China
11.	People still like to read the news via print. The digital news causes distraction whereas the print makes the reader focused.
12.	Prospects for digital growth, both in terms of audience and ad revenue

13. Customers get used to paying for content news is need to know information well to do audiences
14. More people are reading newspapers than ever thanks to digital access and distribution. Quality journalism can have an immediate and wide-spread impact like was never possible in the past.
15. Dynamism and willingness to move forward, interesting innovating ideas. Consumers more and more willing to pay for content online.
16. A realisation that the newspaper industry has to change to survive and thrive
17. Broader reach, coverage & influence for traditional media as a whole(via new digital means).
18. Most positive is the ability to keep readers even though it is online more and more
19. Jeff Bezos buying WP. Pay wall working in some papers. Trend to membership as a main revenue source
20. News are still very relevant for people and they trust newspapers, both paper and digital newspapers.
21. Inkjet digital print.
22. News demand - Digital shift - Content monetization/making digital pay - Available technology, IT capabilities - Data journalism
23. That there are unlimited possibilities to tell a story. Be it in print, online, and so on. There has never been such a wide range to bring a story to a broad audience.
24. Technology provides opportunities Quality of our content Trust in our brands
25. None observed. Paid content - perhaps.
26. A lot has been said about the disruption in media, that is the only constant today. Disruption, has forced legacy media out of lethargy towards experimentation at great speed. So we are seeing more innovations today at an accelerated pace which is good for the consumers as well as media companies -- for the consumers, it gives them more choice and for publishers, it forces them out of their comfort zones and pushes them to create new customer values or offer new solutions good for humankind. Apart from the disruption affecting consumer choices, I believe that disruption affecting business decisions, particularly advertising agencies and marketers is also a trend that is happening simultaneously with the disruption in consumer choices. Another positive trend is the re-investment of the tech billionaires into newspapers which indicates that even these guys believe that there is hope and newspapers can be saved and reinvented.
27. Development of the media presentation on all the electronic devices (tablets, mobile and still computer) which allow us to start some parallel business model.
28. Internet is a mess and only professional media will be informative for future reference. The payment information should be the tendency in all media
29. One of the most positive trends for newspapers is the increasing demand among readers for in-depth and expert analysis of issues, events and so on. Another is the coming to the fore of strategies in the print media that include trends on social media

platforms. The most positive trend perhaps is the new look at "serious journalism" in mainstream print publications, where "dumbing down" seemed to be the order of the day. As an industry, what's in our favour, at least in India, is the fact that online and news television are nowhere near being credible and authentic sources of information.

30. The increased awareness, in the industry, that the contents must be paid. Experimentation with new languages and new forms of journalism
31. Embracing digital and data-opportunities
32. 1. There's a huge need for journalistic content 2. Readers are moving to tablets and smart phones massively. Gives an opportunity to personalize news content
33. The most positive trend is that now that technology is becoming accessible to everyone, content and creativity are becoming more and more important. It's excellent news for media companies. In most countries newspapers have leading online properties with their news sites. There's more to come.
34. In India, news paper circulation is still growing.
35. Our willingness to experiment. and to move away from number crunching. Replacing the old school of infinite wisdom residing in the editorial desk.
36. The hyper voyeuristic approach of other medium that leaves no place for analysis. The openness of editor in considering impact of content on revenue.
37. The digital distribution. People are ready to pay for digital products, like apps, like Netflix
38. Raised income from subscription & sales; finally earnest and serious search for alternative sources of income apart from advertising.
39. Online viewership goes up, online revenue increase accordingly; newsroom revolution, multitask for journalists
40. The access to news via multiple devices/ media - The speed to receive news - Everyone can participate in sharing/uploading stories, photos, & videos - Raise of online videos are a great opportunity
41. A return to local focus.
42. The most positive trend and aspect is that paywalls has become more and more accepted and this gain the newspapers of course.
43. Most positive trends is growing the epaper and online business globally.
44. In India, still the advertisers prefer newspapers. In The Times of India, where I work, we encourage our advertisement departments to sell innovative ads. In 2013-14 we have managed to execute more than 4700 innovations - so the situation is very bright. Advertisement department is working hand to hand with Production department and lots of new ideas are coming out. And advertisers are grabbing it. In India the trend, thus, is still positive. Fortunately, the vernacular newspapers and small circulation English newspapers are also doing fair in innovations. And I believe the trend will continue in 2014-15 also.
45. Credibility People think print media, compared to electronic media, better checked

and more reliable

46. Innovation in formats and methods for storytelling. The increased use of video, data visualizations, interactives, and reader engagement is where we as an industry need to be innovating. These new formats will be the products that carry us well into the future, on mobile devices, computers, and others.
47. With the free flow of information on the internet, people are now more informed which helps to counter any form of censorship by the authorities. However, I prefer a model of our own in a developing country instead of copying from the west.
48. The positive aspects which are in favour of Pakistani Newspapers Industry are 1)Increasing rate of literacy, due to which readership of newspapers is also increasing 2)Urbanization: due to which purchasing power of consumer is increasing 3) Technology also make it easy to find content from all over the world easily.
49. The most positive trend is the growing usage of digital channel
50. The most positive trends are that people are taking to the digital products. Although the digital revenues are still small the digital news(paper)-products and -services are becoming increasingly popular and more and more readers are making the digital news part of their everyday life.
51. Readership of newspapers appear to be stable, even if circulation decreases; this is due to more people reading the same printed copy. but most of all , the key trend today is the mix of media: having links from the printed version to digital content , including videos by way of 2D barcodes
52. Possible growth of successful paywalls. In addition, growth of alternative financial sources, including trusts and donations (e.g. ProPublica). Fundamentally, people's appetite for news has not and will not go away - and this will always be a positive, or at least a potential positive for the industry. Slowly, readers are being retaught that good content costs money, even in what was once the wild west of the web.

2. Still thinking about the state of the industry for Newspapers and Media in 2014, what are the MOST NEGATIVE trends and aspects? What's in our WAY as an industry in 2014?

No. Idea

1. Still slow to move forward with the right kind of pay for content models. Digital development is slow in some markets and needs to be more in line with the interests of a younger market. Overall, it seems that we get too interested in sensationalizing stories and not as interested in strong investigative journalism. The readers want the truth.
2. The very short attention span of our readers in all forms of media
3. Poor creativity, savings glut to appeal the shareholder.
4. The MOST NEGATIVE trend is the INSENSITIVITY of handling HUMAN RESOURCES in MEDIA industry. There is no RESPECT for the quality MANPOWER. So the deterioration of QUALITY CONTENTS is happening. This

has to CHANGE.

5. Advertising revenue is falling and falling. And to find new subscribers is impossible
6. Continue decline in paper readers and advertising.
7. 1) Lower circulation of the printed newspapers and magazines that leads to:2) Print advertising losses
8. Users go to social media, and users won't pay enough for digital news
9. The pace of change in audience dynamics and the rapid change of emerging technologies for staying one step ahead of that.
10. New generation is spending much less time on print articles they rather prefer online version.
11. The internet penetration among the masses has lead to the digital revolution and is creating a hole in prints revenue.
12. Newspaper circulation falling - and revenue. Pressure to make staff cuts
13. Strong decline in print advertising lower prices online bad imago news companies bad motivation staff
14. Revenue per reader is declining as digital CPMs drop and digital advertising revenue lags well behind its print equivalent. Bad journalism and mis-information can also be spread immediately and have a negative impact before the facts are checked.
15. Pessimistic trends of circulation and advertising revenues. Fragile market.
16. Hanging on to the old ways - a resistance to change
17. Still difficult to monetize on digital content.
18. People abandoning print
19. The incapacity to stop the decline of classifieds The unintererest of youngsters for newspapers in any platform The rise of native digital brands in news
20. Advertising revenue diminish really fast. Consumers love paper printed advertising and hate ads in social media. Advertisers do it vice versa.
21. Declining circulation figures, aging workforce,
22. Economic downturn Advertising crisis Consolidation Audience/screens fragmentation Tax/VAT issues Lack of adaptive thinking Internal cultural inertia Issues surrounding data ownership and privacy Cost of technology alignment/evolution Time allocated to read daily newspaper
23. Reduced staff, uncertain economic situation of the industry, declining circulations, not enough earnings from online channels.
24. Pace of change versus legacy cost and structures Perceptions as a declining industry Declining revenues not matching the growth
25. Everything
26. A negative trend is perhaps the death of newspapers particularly in North America and in other parts of the world. This trend is irreversible in the said parts of the globe but it will only be so if these newspapers do not find a reincarnation - as new content

brands - emphasis first on content and then, platforms, not the other way around.

27. Downtrend of the advertisement in the traditional newspaper
28. Social networks and fast track information
29. The structural decline in advertising revenues The choice of markets not to invest in print
30. Cannibalization fear
31. Few people are willing to pay for digital news content
32. Success in terms of digital reach doesn't translate in big money yet, and so the successful financial transformation of our industry will take time. That's a big negative! A second problem is the continuous infringement of copyrights and other violations of intellectual properties on the internet.
33. The growing reach of mobiles as internet interface is a challenge to News Paper circulation
34. That we have mentally given up the battle, and that we are here only for the short haul.
35. Growth of smart phone and more consistent internet services.
36. The revenue will be lower than in the print-decades. But the costs will also be lower (no print press, no distribution)
37. Still very conservative mindset in many traditional news industry companies; native advertising as new dependence from 3rd parties (ad industry); excessive cutting and saving mindset harms media industry as a whole;
38. Circulation down, advertising revenue from print drop
39. Difficult for consumers to distinguish which news are reliable - How do we make our source a reliable source? - The quantity of news is difficult to digest/ filter what is important
40. Social media is a great distracter and a no cost alternative to traditional print media.
41. It's still difficult to make money in the digital channels. We are loosing the new generations.
42. Negative trend is decline print order and losing in print.
43. The quality of news is the most Negative trend. We get news all the times - thru' all kind of media, but I feel, may be 50% are just gimmick, half-true news. Readers are puzzled and cannot able to decide which one to follow. E.g.; Malaysian Air disaster. If we Google it, we will find media is giving often dynamically opposite news, gossip, semi-true information. Public is feeling irritated. The major negative hindrance for us is naturally the advancement of digital media. I am talking from newspaper point of view. E.g.; Which reader will read the news / analysis of a cricket or football match in the morning when already he or she is getting hand to hand instant info in his or her mobile / laptop / desktop? I feel every newspaper should be accompanied with some device which electronically can display current one-liner news.

44. Time and patience. Most of the readers do not have enough time and patience to go through lengthy stories. Since readers are getting news every minute from various sources they think most of the newspapers have nothing new in their news

45. Continued reliance on a deeply backward industry: advertising. Gallons of ink have been spilled lamenting the news industry's inability to adapt to a digital reality, but it is in fact the advertising community that continues to be far to enamored with its existing business structures. Agencies upon agencies, levels deep, separate a publisher from an advertiser, the ends of the spectrum where true innovation can happen. In between are layers of intermediaries who each extract value without contributing new ideas. Quite the opposite: a publisher that can speak directly to a brand has a chance of doing something truly valuable and useful; agencies strip out innovation from the conversation and instead rely on old, dead formats and measurements that mean nothing.

46. The on going MH 370 incident exposed to the world how ugly media in the west is, such as CNN which emphasize on speed and exclusiveness of delivery of news without going through proper verification. Responsible Reporting is crucial.

47. Negative aspects and trends included: 1)Monopoly of few cross media groups decrease the competition in newspaper industry. 2) Regional Newspapers only depends on government advertisement and not willing to increase their circulation and readership. 3)Cover price of newspapers in Pakistan is very high as compare to other South Asian countries, due to this circulation is low in lower class.

48. The most negative trend, almost in Italy, is the continuous decline in advertising revenues. We have to change our business model to balance costs and revenues.

49. The majority of readers still prefer the printed paper and are not ready to switch to all digital or even partly digital news consumption (digital during week and print during weekends). At the same time the costs for printing and distributing the papers are skyrocketing and making the business less profitable.

50. The multiplication of tablets and smartphones encourage the search of immediate news, often barely verified. therefore printed newspapers see their circulation decrease

51. Still need to combat perception, particularly among younger readers, that online content must by default be free. If digital paywalls succeed, it will not be immediate for most media. Another problem with paywalls is that readers will eventually need to choose which media to subscribe to, which also requires a perception shift as many are used to simply jumping from one site to the next. Do you subscribe to both a local and a national site? In some ways it's a question of whether it is possible to go back to the print model of buying one paper and getting the news mostly from that paper. Will people accept this? There also remains a problem of short digital attention spans. This opens the door for competition from "snapshot" or "soundbyte" sites that seek to make news quick and digestible, even "fun". In addition to the competition factor - think of sites like Buzzfeed - more established media have slowly begun to adopt this model: shorter articles for quicker reads on smartphones and tablets. While this may be seen as a necessary adaptation, it also raises fundamental questions about the significance of the news in the first place.

3. All things considered for our industry 2014, do the positives outweigh the negatives or the negatives outweigh the positives?

No.	Items	Times Selected
1.	The positives for the industry somewhat outweigh the negatives	19 (34%)
2.	The positives and the negatives are fairly equal and balance each other out	13 (23%)
3.	The negatives for the industry somewhat outweigh the positives	12 (21%)
4.	The positives for the industry far outweigh the negatives	6 (10%)
5.	The negatives for the industry far outweigh the positives	5 (9%)

4. What's your level of OPTIMISM about the industry in 2014 as well as thinking about FIVE YEARS from now? Use an index of 1-100 (whole numbers only) where a '1' means completely pessimistic and a '100' means completely optimistic:

No.	Idea	High	Low	Avg.
1.	Optimism for the industry and its outlook in 2019	95	10	58
2.	Optimism for the industry and its outlook in 2014	90	10	54

Innovations in the Industry

5. As you think about the last 2-3 years in your organization, or any of the organizations you work/consult with, what's the ONE INNOVATION that was most important and had the biggest impact for the organization? Why was this so effective?

No.	Idea
1.	I've watched the work at The Arizona Republic, one of the largest dailies in the Gannett community, and its digital work with 'azcentral'. They have just released their latest versions (3.2014) of the mobile apps and they are excellent and well synchronized with their pay for content model. They have been building a good digital strategy for over 5 years and their work seems to be paying off.
2.	A common editorial platform where all the content creation can take place then be purposed for the final output platform
3.	I don't see any, sorry.
4.	The ONE INNOVATION that was most important and had the biggest IMPACT for the organisation was of conducting of EXECUTIVE TRAINING for the staff members. This made them work effectively for QUALITY output.
5.	Editorial teams of newspapers work together
6.	Digital issues. Made possible to gain experience and market share in this area, above the paper.

7. Social networking brought more "followers" and thus, a growth in digital media.
8. Consolidation of technology infrastructure enabled content sharing and streamlined the capacity to make enterprise-wide changes as needed in a very rapid manner.
9. 3D printing in newspapers. Our organization print more than 30 3D editions from various locations & create 10 cr revenue.
10. Building new websites / iphone and android news apps. to make a mark in the online field this was a necessity.
11. We are in a period of transition and moving to fully integrated newsroom in next 6/7 months
12. Growing towards cross media servicing clients
13. An interesting growing trend is non-profit newsrooms that perform top-quality investigations. These investigations, necessary for our societies and once exclusive to large newspapers, are very expensive. The drop in revenues at mainstream media outlets means that less money is being put into these investigations as the financial return is not there. If these investigations are to continue, it may have to be done on a non-profit basis.
14. Innovative editorial content : we created a department dedicated to the creation of innovative editorial content
15. A move to sell advertising against audiences as opposed to sites
16. Launched an IPTV news channel & changed the pace of news-gathering in a traditional print media group.
17. The start of working with data cross channels. Gives the ability to personalise.
18. Paywall, cause it gave hope to catch the purely digitals
19. Digital advertising income success for some of our country’s newspapers.
20. 1. Engaging youth when young - distributing paper to school (with different product target at different age group) 2. Scented ink, translucent paper - new revenue stream
21. Paywall introduction.
22. Using more visual ways to tell stories.
23. Improving collaboration between editorial and commercial departments . Because this us essential to our future
24. Entering entertainment TV market. That's relatively stable and profitable market, unlike printed and online news.
25. a) Content specific to platforms -- The rise of new forms and new types of content adapted to platforms -- lean forward and lean back journalism. Related to this, getting paid for original, unique, premium content; we need to see more success stories on this b) Culture shift -- The culture change that is happening in most newsrooms today to transform and navigate the disruption. Sales and other departments are likewise being transformed. c) Cross-platform collaboration d) Newspapers transforming into multimedia organizations
26. Developing our visibility on the different social medias. Create an E-Paper. This

permit to increase multimedia advertisement income and also the number of readers.

27. Adapting services offered to new consumer needs using technology, new advertising formats, tariff adjustment
28. The real transition to the multimedia approach and the realization that the current editorial costs will not be sustainable in the future
29. building a new CRM environment, enabling to personalise and individualize our content and offerings
30. 1. Moving from broadsheet newspaper to Berliner format 2. Developing an adaptive digital design
31. The introduction of different subscription models and prices. We combine paid-for print and digital products in all shapes and sizes, and it works. Not all people want the full Monty!
32. Mobile app as more and more people are accessing news on mobiles
33. Going digital. Going where the customer is.
34. The willingness to experiment. And a 8 page gatefold been the most promising- as it need not be pitched to one brand but can be a category led innovation.
35. We made a special site for youth and knew how to attach the youth to regionale news.
36. Enhanced collaboration of news agencies (our business) with their member news media -> joined forces to better cope with challenges from the market
37. Newsroom reform. News is still the soul of the newspaper industry. Its the definition of newspaper change, not news. News should no longer be confined within the 4 corners of the news print. The newsroom should generate news in different format to suit various platform.
38. Implementation of online videos has a great impact: We started understanding our clients and how consumer behavior is different online than in print.
39. We have a patient deep-pocketed owner, who is willing to invest further in business development and our continued ability to address new markets.
40. Paywalls, nice solutions for smartphones
41. Improve productivity via innovation is very important to cut cost since profit of newspaper industries are declining especially in print.
42. The smartphone
43. Volkswagen Talking Newspaper advertisement. Readers' feedbacks were enormous positive. Placing the electronic chip in newspaper, was somewhat astonishing for the readers. It was a mammoth task for us to put almost a million chips in newspaper. It provided great confidence to our newspaper production and advertisement departments.
44. Initiatives taken to better the society with reader participation such as rain harvest, health care etc
45. Charging for our product. Seriously; what took us so long? Why shouldn't we ask people to pay for the thing we are most proud of and most skilled at doing?

46. The expansion and incorporation of digital aspects in the newsroom.
47. Latest Technology and Social Media is a biggest innovation in our organization, which helps to communicate in a better and quicker way.
48. Multimedia convergence. The way to be closer to the change of habits of our readers/customer
49. The first all digital news application. Not that it was a financial success but it opened the eyes within the organisation that we really need to start working differently and producing new kinds of products. The employees started appreciating the digital products more realised that the print might not be here forever. It also opened the eyes for the need of multitalented people. Most employees have realised that they cannot expect to perform according to the old standards, they have to be able to learn new methods and procedures to remain employed in the future.
50. Digital printing of newspapers , with variable dates enabling targeted marketing, fine microzoning

6. Where does the industry need to be MORE INNOVATIVE in the next 5 years?

No. Idea

1. Far more customization to my news and consumer profiles with the digital apps and media. More consistent pay for content models and a strong level of support for the advertisers. The industry also has to stay ahead of the technology curve on the capabilities of smartphones, tablets and wearable technologies. Recruit more innovative leaders into the organizations.
2. Interaction and feedback, sure print is a once a day thing but all other media must be aware and receptive to feedback
3. Creating unique and distinctive journalistic contents.
4. Industry must CONCENTRATE on QUALITY EXECUTIVE TRAINING. This is will boost the MORALE of the staff members.
5. Customer contact (Advertising and readership)
6. How to address customer needs, Interacting with customers, managing communities of interest, user experience is king (more than content)
7. I would not say more "innovative", but rather become aware of what the audience needs
8. The industry needs to be more innovative in monetizing content, and in marketing, selling and targeting advertising for its web, mobile, print and broadcast channels.
9. More value addition on advertisements. Our organization take initiative to print 3D advertisements ,French windows, super panorama, installed gluing machines, UV & florescent inks, flaps, fragrance etc etc..
10. To consolidate the subscriber base and make the shift from print to online / mobile seamless.
11. Audience engagement

12. Create loyal news customers. offer advertisers unique contacts with brand lovers
13. Segmenting audiences and producing and selling them the content that they need for their daily and/or professional lives. If digital revenues aren't going to cut it, that means that chasing page views is pointless. It may be best to reduce the scope, reduce the news hole to concentrate on niche topics and own those topics so that readers need them and will be willing to pay to support the journalism. Advertising revenue follows qualified audiences.
14. In the very core of the organization : think innovation on a day to day basis
15. More of the above - plus a spreading of newspaper assets to provide more value to the subscriber/reader. Such as offers, training courses, ease of access to relevant content connected to stories etc
16. Mobile services.
17. Journalism - more focus on readers
18. Membership
19. How to get people pay from digital content. Everything is offered for free - at least for technologically oriented people.
20. Inkjet digital printing - improve run length, print reproduction quality.
21. Provide dynamic customer experience Added value oriented content proposition to users Editorial marketing Simplifying the way we do business Talent retention Internal organization design
22. Giving editorial departments better instruments for story publishing. Whereas the tools for the print channels are sophisticated, there is still a lack of user-friendly, simple CMS to maintain the online-channel in an innovative way.
23. Culture changes in newsrooms , marketing and technology
24. Redefining news as a valuable asset, worth paying for. - Finding ANY other sources of revenue to support the core business.
25. a) The legacy media/industry most specifically needs to show more innovation on the content side to avoid losing more audience b) Sales teams must be re-engineered and new blood on digital/multimedia side is also necessary because the print sales guys are not wired to sell multimedia c) Investment in non-core business for publishers or legacy companies that are heavily disrupted in order to replace lost revenues from legacy business d) Integrated newsrooms e) New blood and new leadership
26. Multimedia presentation of the news content - The method to monetize the content
27. Use of technology and content improvements
28. Development of new languages and forms of publishing Development of ancillary revenue Awareness and exploitation of the value of the brand
29. Mobile and social
30. Personalization interaction
31. We have to get much, much better in making our websites and apps more attractive

through superior design, and much better story-telling.

32. Yes of course on mobile. Try to deliver News Paper on mobile as soon as possible , of course as paid content
33. Think different and follow the customer on his media journey. Do not create and wait for the customer to seek you out. Seek them out and let them discover.
34. In its approach to marry adapt leverage other available technology
35. More niche-media. Digital makes it possible to serve the smallest interests and don't bother them with news they not interested in at all.
36. New revenues, build / maintain independence from state and / or other 3rd parties to be truly independent -> only economic independence can be the foundation of editorial freedom
37. Info-graphic, story telling by using video and animation.
38. How to monetize these trends
39. Encouraging and enhancing literacy to the youth.
40. Focus in digital channels, make all print processes become as effective as possible (simplify the product portfolio for the sales organization) and focus on needs, the younger generations and new newsroom to meet.
41. Innovative to attract young people involve in news paper business. The way to attract them to read print news paper is not easy. One way is engage school since young and let them involve in creating youth section in daily news paper. Let them choose topics, let create themselves, let them edit, etc. I found that Java post doing well in success of youth paper.
42. Data-driven innovations. the industry need to understand and act on insights. it is time that data is a big part in decision making on a strategic level in the media industry
43. I believe we need to put now editorial innovations too. Serious readers will be very happy and react positively. We should also continue with advertisement innovation, of course.
44. News presentation and analysis. They have to be more interactive also
45. Building audience. Whether supported through advertising or subscriptions, we need to understand where tomorrow's readers are today, find them, and convert them. This means new products, new information services, and lots and lots of experimentation.
46. To further expand and develop the digital media within the company.
47. Newspaper industry should be innovative with the content and design of the newspaper as it attracts the readership and increase the circulation.
48. In adapting the journalism style to the new channels and users
49. Definitely in the area of understanding what different target groups need. We cannot anymore produce one product (i.e. printed newspaper) that cater to all needs. We need to identify the target groups and their needs and produce more niched (digital) products than before. The need for innovation thus covers everything from selection of content, layout and functionality of user interface to the business models. The future readers are

not willing to commit for a year at a time, we need Netflix and Spotify -like thinking as well as probably all new business models that are free for the end user but sponsored by business partners etc.

50. Personalisation of newspapers and hybrid printing, miw of offset printing and inkjet printing for variable datas

51. Website design. While some sites are clear winners (NYT, Guardian) there is clearly room for improvement across the board, new ways to grab and hold reader attention.

Access to Content

7. As you think about digital access to content in 2014, how would you say that consumers access news and information from newspaper/media sites across the following 3 device types? Please allocate 100 points in whole numbers only:

No.	Idea	High	Low	Avg.
1.	Access by Smartphones	70	15	38
2.	Access by Laptop/Desktop Computers	70	10	37
3.	Access by Tablets	50	5	23

8. As you think about digital access to content in 2019 (five years from now), how would you say that consumers access news and information from newspaper/media sites across the following 3 device types? Please allocate 100 points in whole numbers only:

No.	Idea	High	Low	Avg.
1.	Access by Smartphones	85	25	54
2.	Access by Tablets	55	5	28
3.	Access by Laptop/Desktop Computers	50	0	17

9. Overall, had the tablet had as much impact for the industry (access to news/information, pay for content support, application development, market expansion, etc.) as you would have expected?

No.	Items	Times Selected
1.	No, it has FALLEN SHORT of my expectations for the industry	30 (54%)
2.	Yes, it has MET my expectations for the industry	21 (38%)
3.	Yes, it has actually EXCEEDED my expectations for the industry	4 (7%)

10. Please explain your response to the above question and tell us why you responded the way you did about the tablet expectations and impact:

No.	Idea
1.	It's not so much the apps the level of support, it's just that tablets have not been as strong a device as originally expected. The primary reason has been the advances in smartphones with better news and media apps, larger screen sizes and good wifi and broadband connectivity. It's become the device of choice for staying connected.
2.	Tablet was sold as a game changer, yes it has been but not to the extent I thought it would
3.	The demand isn't as high as expected. The tool isn't the key, it's the content!
4.	I was expecting a great turn-around with the tablets. But the newspaper/magazine Apps did not gave that kind of result. There were problems of Design and Interaction capacities. Need to work on more case studies why this is happening.
5.	Ipad is now 4 years in the market and it seems to be a device, which is for 2 decades here
6.	Because there is still a long way to go. It is not moving too fast yet as the number of tablets in the total users is still limited.
7.	Tablet prices are still high, at least for the types that can support apps or paid content decently.
8.	I think smart phones have made it so easy to quickly access news/information simply by reaching into one's pocket, purse or what have you. The tablet no so accessible. The ability to connect a keyboard easily to a tablet will displace the use of traditional laptop/desktop computers.
9.	2G ,3G & 4G penetration in my country over past 10 years is much more than expected. Data accessing now is very fast & easy.
10.	It was expected that some part of users will use tabs to get news as its portable and readable compared to a mobile
11.	Offers plenty of potential for customisation of reader experience
12.	Very fast penetration in right target audiences news is important driver for use
13.	Firstly, tablet access is still mostly done through the mobile browser instead of dedicated apps. Although this is fine in terms of traffic, the experience is not quite the same. A dedicated app is a cleaner, more magazine like experience. Dedicated apps also mean dedicated audiences. App subscriptions will likely continue to be sold to niche audiences that have a real connection with the newspaper but studies show that even then they are not highly consulted. Secondly, the experience of apps and to a large degree mobile browser reading has not yet taken advantage of the devices to any great extent. Mobile browser experiences are still often a copy/paste of the website and app experiences are often an uploaded PDF with little to no interactivity or advantages for advertisers. This will likely change over the next 5 years.
14.	Great adoption rate, consumers more willing to pay for content on a tablet, better experiences with advertising
15.	There's been so much hype around tablets - penetration is obviously growing fast but I doubt newspaper site access has grown quite so fast. In other words newspaper access

isn't the primary reason that many consumers buy a tablet. We often forget that not everyone is like those in the media industry!

16. The scenario of Tablet usage veer more toward casual reading & entertainment instead of news consumption.
17. The Tablet fell short when it comes to news apps, but exceeded expectations when it comes to news consumption in general surfing shopping.
18. News become so universal and omnipresence that the competition in the tablet world became as wild as in the web
19. It’s not a moneymaker as I thought before. It’s more or less light laptop. More to surf on free news sites. Some pay and use newspaper apps, but income are still very low.
20. 1. fast and easy access to up to date news. 2. wider reach for digital platform, target youth
21. While there was a huge craze when tablets appeared, it seems like people favour today to get news on smartphones or still on the printed paper. Tablets have not really make up for losses in the printed circulation.
22. Slower to adapt to the technology. Publishing systems which integrate are more expensive to integrate and advertising solutions not settled on
23. I think publishers can still do more in this area particularly in our local industry where we have yet to launch tablet native products that are rich in content and appeals to a new audience segment
24. Usability of tablets vs. desktop, as people see that a tablet can easily replace the desktop for the normal need of a computer. Mobile still stay on the run (train etc.)
25. Using the tablet as an information support, is being replaced by smartphones allowing access anywhere to be more manageable and also have use as a phone
26. Replica apps won't do the trick
27. Market penetration is in line with expectations and the development of sales steady growth but contained
28. It meant we are competing with totally different services: games, mail, music, social media, et cetera. Reading a newspaper, readers isolate themselves from the world, reading a tablet, readers have impulses to do something else constantly
29. Tablets are a great device for accessing news sites where and when the consumer likes to, but the screens are too small for a good reading experience of e-papers. In that sense they haven't revolutionized our industry. At least, not yet!
30. I can answer only from the way my media house responded to it. Should have responded more aggressively and explored digital content delivery on tablet as paid content
31. The tab is an intermediary device between the PC and the mobile. Mobile and tab will merge.
32. Smartphones due to their ease in carrying have outsmarted these.
33. All the efforts to produce money-making apps didn't work out until now.

34. Tablets as devices to access news have been overrated in their first years. They might suit for magazine and niche content, but are not a suitable medium to replace newspapers, especially when keeping in mind people's usage of these devices, which peaks during the evening hours.
35. It’s because there is insufficient tailor-made content for tablet so far. A lot of people still using tablet to view website content.
36. The tablet is neither replacing mobile, nor desktop - From the idea it is in my opinion not supposed to replace them in the future either.
37. Expansion of the use of tablets is still the future.
38. The tablet should have had more impact but never the less I think that smartphones and tablets will merge into one device very soon.
39. When we launch epaper via online our print circulation drop significantly. That show us tablet impact is great.
40. The industry did not make it happen. We decided to just move the news paper in to the tablet. We still work with the same way of telling a story, on pages, text and pictures. We need to re-think and fully use the opportunities special for the tablet.
41. Price is the primary reason for 3rd world countries. Still the penetration is bare minimum to mass in India. The cheaper quality does not give good quality of speed or display and people are apprehensive to purchase them. If the technological revolution brings down the Branded Tablet cost by 50%, there will be huge impact. Apple, Samsung, Google need to reduce their Tablet price, then we can see the effect.
42. Innovations made smart phones more user friendly and it has become more essential and convenient than tablets
43. The tablet had a very brief window of utility, at most two years, while smartphones were still growing in capability and in size. I think we'll soon see a convergence somewhere in the 5-6in form where the line between phone and tablet is blurriest, such that a reader will have just one multipurpose communication device with them at all times. The benefit of a tablet isn't here yet, and won't arrive until it can realistically replace a laptop or desktop.
44. Smartphones are more handy and convenient to access to content rather than tablets.
45. In Pakistan tablet is not very popular, so we cant expect any thing from it.
46. Tablet is a good way to access not only the "spot" information but also the in-depth analysis; being closer to the newspaper size. But the number of devices sold and used for this purpose is less than expected.
47. My expectations for the tablet have not been overly optimistic to begin with, rather I'd say they have been realistic. Even though I like tablets myself I realise that they are fairly expensive and difficult for elderly and non-technical people to maintain (updating and logging into AppStore etc). Thus I didn't expect that the entire population would get a tablet in only a few years. The same goes for the products, the printed paper is so dear to a majority of the readers that they don't feel a need to switch to digital. The public is just not ready to abandon the print for digital versions yet, and this has been evident from the beginning of the tablet era. We need to introduce new

products and services that prove the excellence of digital products over print (add services that enhance the daily life of the reader like on-line information on public transport, discounts to the local grocery store etc) and gradually help the public believe in the digital news products.

48. Increasing impact which I though would happen but smartphones are being more and more used for breaking news

49. I would say it's fallen short because it seems to get squeezed out the smartphone on one side and laptop on the other. Tablet remains a niche product.

New Players in the Industry

11. On October 1, 2013 the Washington Post was sold to Jeffrey Bezos of Amazon.com after four generations of family ownership by Donald Graham at the Post. Many consider this is be a landmark event for the industry and a 'changing of the guard'. How do you assess the change in ownership?

No.	Items	Times Selected
1.	This is a net positive for the industry	38 (69%)
2.	This is a non-event for the industry, just an ownership change	9 (16%)
3.	This is a net negative for the industry	8 (14%)

12. Regardless of your assessment, do you anticipate seeing other ownership changes of major media organizations in 2014 by non-traditional players?

No.	Items	Times Selected
1.	Yes	38 (69%)
2.	Not sure yet	13 (23%)
3.	No	4 (7%)

Industry Trends: Please indicate the extent to which you agree with each of the following trend statements over the next five years...

13. THE TREND IN PRINT: The decline in traditional newspaper print has leveled off and will be stable or see even modest growth over the next 5 years on a global basis
HIGH/LOW REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	High	Low	Std. Dev.	Avg.

		High	Low	Std. Dev.	Avg.
1.	THE TREND IN PRINT: The decline in traditional newspaper print has leveled off and will be stable or see even modest growth over the next 5 years on a global basis	5	1	1.1	2.6

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	1	2	3	4	5
1.	THE TREND IN PRINT: The decline in traditional newspaper print has leveled off and will be stable or see even modest growth over the next 5 years on a global basis	7	24	9	9	3

14. PAY FOR CONTENT: Consumers will accept the pay for content model as the norm for in-depth, selected or customized digital content for newspapers
HIGH/LOW REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	PAY FOR CONTENT: Consumers will accept the pay for content model as the norm for in-depth, selected or customized digital content for newspapers	5	1	1.1	3.7

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	1	2	3	4	5
1.	PAY FOR CONTENT: Consumers will accept the pay for content model as the norm for in-depth, selected or customized digital content for newspapers	3	5	4	31	9

15. INTEGRATED NEWSROOM: By 2019 nearly all newspaper organizations will have moved to an integrated newsroom where traditional print and digital/specialty media staff and operations will share space, processes and content

HIGH/LOW REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	INTEGRATED NEWSROOM: By 2019 nearly all newspaper organizations will have moved to an integrated newsroom where traditional print and digital/specialty media staff and operations will share space, processes and content	5	2	0.8	4.4

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	1	2	3	4	5
1.	INTEGRATED NEWSROOM: By 2019 nearly all newspaper organizations will have moved to an integrated newsroom where traditional print and digital/specialty media staff and operations will share space, processes and content	0	3	3	18	28

16. YOUNG JOURNALISTS: The journalism profession will experience a rebirth as a very attractive career path for young professionals due to the technology changes, new media formats, and new leaders/organizations in the industry combined with the traditional values/role of journalism
HIGH/LOW REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	YOUNG JOURNALISTS: The journalism profession will experience a rebirth as a very attractive career path for young professionals due to the technology changes, new media formats, and new leaders/organizations in the industry combined with the traditional values/role of journalism	5	2	1.0	3.7

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	1	2	3	4	5
1.	YOUNG JOURNALISTS: The journalism profession will experience a rebirth as a very attractive career path for young professionals due to the technology changes, new media formats, and new leaders/organizations in the industry combined with the traditional values/role of journalism	0	10	9	22	11

17. WEARABLE TECHNOLOGY: The continued development of 'wearable technology' (for example Google Glasses and Samsung smart watches) will create a new and important opportunity for media/news to be delivered real time in entirely new ways
HIGH/LOW REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	WEARABLE TECHNOLOGY: The continued development of 'wearable technology' (for example Google Glasses and Samsung smart watches) will create a new and important opportunity for media/news to be delivered real time in entirely new ways	5	1	1.1	3.5

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	1	2	3	4	5
1.	WEARABLE TECHNOLOGY: The continued development of 'wearable technology' (for example Google Glasses and Samsung smart watches) will create a new and important opportunity for media/news to be delivered real time in entirely new ways	1	8	18	11	13

18. PRESS FREEDOM AND JOURNALIST SAFETY: The International Press Institute reports that 2012 and 2013 were the deadliest years on record for journalists with 132 killed in 2012 and 117 killed in 2013. Despite good efforts from many media organizations and governmental agencies, this is a trend that will continue at the current or even higher levels over the next 5 years

HIGH/LOW REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	PRESS FREEDOM AND JOURNALIST SAFETY: The International Press Institute reports that 2012 and 2013 were the deadliest years on record for journalists with 132 killed in 2012 and 117 killed in 2013. Despite good efforts from many media organizations and governmental agencies, this is a trend that will continue at the current or even higher levels over the next 5 years	5	2	0.8	3.8

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	1	2	3	4	5
1.	PRESS FREEDOM AND JOURNALIST SAFETY: The International Press Institute reports that 2012 and 2013 were the deadliest years on record for journalists with 132 killed in 2012 and 117 killed in 2013. Despite good efforts from many media organizations and governmental agencies, this is a trend that will continue at the current or even higher levels over the next 5 years	0	2	14	24	9

19. CONTENT TRANSFORMATION: The almost endless appetite for customized content (news, information, trends, lifestyle, community connectedness, etc.) will transform current newspaper companies into content aggregators/providers that enable them to compete with some of the most powerful technology and social media companies in the future

HIGH/LOW REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	CONTENT TRANSFORMATION: The almost endless appetite for customized content (news, information, trends, lifestyle, community connectedness, etc.) will transform current newspaper companies into content aggregators/providers that enable them to compete with some of the most powerful technology and social media companies in the future	5	1	1.2	3.6

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	1	2	3	4	5
1.	CONTENT TRANSFORMATION: The almost endless appetite for customized content (news, information, trends, lifestyle, community connectedness, etc.) will transform current newspaper companies into content aggregators/providers that enable them to compete with some of the most powerful technology and social media companies in the future	3	10	5	23	11

20. LOCAL STAYS DOMINANT: The desire for readers and audiences to be aware of and engaged in their local communities will continue the need for newspapers and their media platforms to be THE SOURCE of local, relevant and timely information
HIGH/LOW REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	LOCAL STAYS DOMINANT: The desire for readers and audiences to be aware of and engaged in their local communities will continue the need for newspapers and their media platforms to be THE SOURCE of local,	5	2	0.8	4.2

relevant and timely information

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	1	2	3	4	5
1.	LOCAL STAYS DOMINANT: The desire for readers and audiences to be aware of and engaged in their local communities will continue the need for newspapers and their media platforms to be THE SOURCE of local, relevant and timely information	0	2	4	26	19

21. THE ROLE IN SECURITY AND PRIVACY: Newspapers and their media companies will emerge to play a more significant role in the definition/boundaries of information privacy and security based on the recent high profile incidents such as Edward Snowden and the NSA leaks and a need for a non-political set of guidelines
HIGH/LOW REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	THE ROLE IN SECURITY AND PRIVACY: Newspapers and their media companies will emerge to play a more significant role in the definition/boundaries of information privacy and security based on the recent high profile incidents such as Edward Snowden and the NSA leaks and a need for a non-political set of guidelines	5	2	0.8	3.7

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree (3) Neither Disagree nor Agree (5) Strongly Agree
(2) Disagree (4) Agree

Rank	Idea	1	2	3	4	5
1.	THE ROLE IN SECURITY AND PRIVACY: Newspapers and their media companies will emerge to play a more significant role in the definition/boundaries of information privacy and	0	5	13	26	7

security based on the recent high profile incidents such as Edward Snowden and the NSA leaks and a need for a non-political set of guidelines

22. NEW LEADERS: The combination of a retiring set of current leaders and the attractiveness of newspapers and their large audience reach will create an influx of high profile new leadership into the industry that will have a profound impact on the direction of the industry for the next decade
HIGH/LOW REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	High	Low	Std. Dev.	Avg.
1.	NEW LEADERS: The combination of a retiring set of current leaders and the attractiveness of newspapers and their large audience reach will create an influx of high profile new leadership into the industry that will have a profound impact on the direction of the industry for the next decade	5	2	0.9	3.7

FREQUENCY DISTRIBUTION REPORT

(1) Strongly Disagree	(3) Neither Disagree nor Agree	(5) Strongly Agree
(2) Disagree	(4) Agree	

Rank	Idea	1	2	3	4	5
1.	NEW LEADERS: The combination of a retiring set of current leaders and the attractiveness of newspapers and their large audience reach will create an influx of high profile new leadership into the industry that will have a profound impact on the direction of the industry for the next decade	0	6	14	22	9

Demographics and WAN Conference Attendance
23. Please indicate the number of years you have been working in the newspaper/media industry:

No.	Items	Times Selected
1.	More than 20 years	22 (40%)

2.	11-20 years	18 (32%)
3.	6-10 years	8 (14%)
4.	1-5 years	6 (10%)
5.	Less than 1 year	1 (1%)

24. Please indicate where your company/office is located:

No.	Items	Times Selected
1.	Europe	32 (58%)
2.	Asia/Pacific	18 (32%)
3.	North America	4 (7%)
4.	Latin America	1 (1%)
5.	Middle East	0 (0%)
6.	Africa	0 (0%)

25. Did you attend the 2013 WAN Conference in Bangkok?

No.	Items	Times Selected
1.	No	51 (92%)
2.	Yes	4 (7%)

26. Will you be attending the 2014 WAN Conference in Torino?

No.	Items	Times Selected
1.	No	23 (41%)
2.	Not sure yet	21 (38%)
3.	Yes	11 (20%)

27. Please indicate your primarily role:

No.	Items	Times Selected
1.	Other (please indicate in text box that appears)	22 (40%)
2.	Editor	10 (18%)
3.	Publisher	6 (10%)
4.	Journalist (writer, photographer, blogger, etc.)	6 (10%)

5.	Newsroom/Media Operations or Distribution	6 (10%)
6.	Industry Association	3 (5%)
7.	Consultant	2 (3%)

No.	Item
1.	Other (please indicate in text box that appears)
	1. IT
	2. Manager
	3. COO - Operations and Technology
	4. Quality and Color management specialist
	5. Sales and marketing of technologies and services owned or produced by the media company I work for.
	6. Quality Assurance Manager
	7. server admin of news website
	8. Insights director
	9. Software and analytics provider
	10. Chief Strategy Officer
	11. VP and Group Chief Strategy Officer
	12. Marketing and CRM
	13. Marketing
	14. Head of data
	15. Production and Engineering
	16. Technology Director
	17. Research and Development for media company
	18. Equipment vendor
	19. No role specified
	20. No role specified
	21. No role specified

Closing Thoughts

28. How will the fundamental role of newspapers/media CHANGE in the next five years? What do you see as the PURPOSE of newspapers and media in 2019 as you consider the changes in technology, consumer trends, economics and global affairs? Please be as specific and persuasive as you can:

No.	Idea
1.	It continues to be the role of engaging me in current news, trends and entertainment.

Inform me on a professional and trusted way. The biggest changes will be its overall role in information aggregation and big data analytics.

2. Yes I see media newspapers as a change leader
3. Media will struggle a lot to keep their role as independent guards of democracy and humanity. It's now the moment for philanthropists to protect these values until new models of content/paying are well established.
4. The fundamental role of newspapers/media will have to focus on QUALITY of the content. It will need to bring back the CREDIBILITY. The SOCIAL MEDIA will become the WATCHDOG to the traditional MEDIA. Greater attention required for the PRINT media while adopting to the DIGITAL media. Doing a COPY and PASTE job will not bring the required REVENUE impact. Newspapers will remain the STRONGEST media component on PRINT and DIGITAL. More DISRUPTIVE INNOVATIONS will happen in next five years.
5. Only a few newspapers will be left - high quality papers with high circulation and local newspapers with circulation around 10 k. All newspapers "stuck in the middle" will be gone
6. Customised news to customer needs. Opinion, advising and direct coverage will be more important over normal news (the plain vanilla, no payment, ad based model will keep for these). Paper will go away progressively. A balance between global and local content will continue.
7. I do not have a clear idea about it.
8. The fundamental role of newspapers/media is fragmented and market specific from one side of the globe to the other, as are the purposes of newspapers and media. Change is constant. What is important is not what changes, but what has not, does not and will not change: the fact that it is much easier to shut down a web site or a broadcast channel than it is a well hidden or well-protected printing press. Therein lies the truth about the purpose of newspapers and media yesterday, today, and in 2019 (and beyond).
9. Readers may ask for specific / selective content in prescribed formats. Technology will definitely change & will be more reader friendly.
10. The purpose will be to give a quality news verified and unbiased and to make clarity in the minds of people
11. The smart media and newspaper companies embrace the wisdom of the crowd and use their audience to help on stories. The will become moderators of sorts, allied to a return to the old values of good journalism - exposing what some people want to keep hidden. Adding context and depth will be as important as finding and reporting of stories
12. Newsmedia will become strong brands or disappear
13. We will see a return to newspapers' heyday of tough investigation and expert analysis. Newspapers will realize that chasing traffic with popular content headlines is a race to the bottom and will focus on providing the most pertinent information to their communities. Many will do this with a transition away from print. Print advertising revenues, although still the biggest chunk of revenue for many publishers, will

continue its decline (without major and widely-adopted innovations to the model), and printing newspapers will no longer be economically viable. The savings from not printing and delivering papers can be invested back into the newsroom as well as cheaper and better digital products.

14. Newspapers will remain as a vital source of well-informed, well-researched purveyors of content. What will change is how these benefits will be distributed and consumed, and the degree of personalisation available to make the content as relevant as possible to the consumer.
15. Surviving media groups or companies will be fully digital content aggregator & providers.
16. Primary role is still to be the "watchdog" in society being the objective source. Furthermore media will be a more broad description of content produced by both professionals and amateurs.
17. The main role of professional journalism will be to certify what is true and what's is not - and in which measure - of the content that is exposed in all platforms, social media, etc.
18. It's more and more question of helping people to understand the world, neighbourhood and him/herself. Newsmedia/-paper is a servant in a humans´ life. If you get some relevant helping points during a week from your servant (newspaper), you will pay for the service provider. And commercial side is almost as relevant as the journalism. Ads are news also! That's a part which is always neglected - also in this kind of research.
19. 1. Focus on providing in depth & quality analysis 2. Study reader trend/habit and "push" info/ads to reader thru' digital platform.
20. In the past years, the industry has learned a lot. It is still not sure if it can transform these knowledge into profits. May be we know enter a period where we can profit from the gathered knowledge, be it in the ways stories need to be told, be it also in the development of new tools for publishing industries.
21. To provide excellence in content using leading technology and marketing tools to access existing and new audiences . Content in this case will be led by quality journalism but also data, information ,content platforms , new Chanel's of distribution and increasing reader engagement.
22. There's very little positive news for news industry in these times. Especially for non-English language, national media. I expect the vast majority of media companies to go extinct in the following 10-20 years and the other to transform into NGOs or becoming PR vehicles for the ones, who poses the money - companies like Amazon, or perhaps, governments or political parties.
23. Media will continue to play an integral part of human existence. However, it must stay relevant in order to become part of people's daily habit. I believe compelling content and not platform will ultimately win the game.
24. Users are increasingly mobile, with higher requirements in matters of content selection. As specific content on demand. They're not willing to pay for something they don't need. Our role will be to give them the opportunity to select what when where.

25. The media should connect with society and be a reliable and accurate reference information. They must be able to synthesize and deliver authoritative information to your readers interest and can deepen if they wish. Traditional media should deepen local information, analysis and reflection. They help create a review.
26. Curator and explainer of 'news'
27. There will be a concentration in the sector and a specialization on content. The newspapers will tell stories related to current events and not only chronicles. They will continue to oversee the local content that newspapers remain a usp
28. Inform people about their personal environment
29. Successful newspapers will be the largest multimedia newsbrands in their respective markets because they understand 24/7 news, and have the authority that other media lack, let alone technology companies.
30. Go local and go mobile. Pay for content will become the norm in next five years
31. Become a content curator and gateway, as news creation and consumption becomes omniscient, media brands will evolve to be the trust and authenticity provider.
32. Newspaper formats would be different and organisation that define themselves as part of NEWS and not necessarily Newspaper would gain and flourish. The news will become more niche and sub-segmented niche news media channels will emerge
33. Produce tailor-made news without forgetting the serendipity (everybody needs a frontpage...)
34. Those newspapers who will survive the next years and still deserve to be named newspapers (not eCommerce shopping malls nor ad brochures full of native advertising), will serve their paying audience with the same purpose they did throughout the last decades: a newspaper will be a TRUSTED agent that delivers the MOST IMPORTANT NEWS of the day / week (/ whatever period the customer demands) which the reader should not miss in order to be an informed citizen in a HIGHER THAN EVER QUALITY, which the consumer embraces and is WILLING TO PAY FOR. The aim has to be to make the consumer look forward to every single issue, as it serves him with such ADDED VALUE that he knows he would miss something if he had not consumed it. A certain degree of SERENDIPITY makes sure there are still elements that surprise the reader, as he had not expected them and none of the personalised Flipboard-like news aggregators is able to deliver to him, as he did mention them in his preferences.
35. The fundamental role of newspapers/media will not change in the future, its the way how news present changes. Newspaper will take up the role as TV, radio, chatroom, forum and social media
36. I think that the role of a traditional journalist will be to give context and analysis of stories, while the actual stories come from people with smartphones
37. Emergence of more national and global media outlets converging the various technologies.
38. Print order still will decline but all of us find way to maintain or less decline rate. Online paper have to growth to compensate the decline in print.

39. The media industry will always have an important role in telling the story. Readers will continue to appreciate get content in a package. We tend to get smaller and smaller worlds when mainly reading what other people share in social media. Content made to be shared and often not telling the important stories. I believe that we will see a shift and going back to want someone to give us the news for real.

40. Newspapers will be entirely content driven. People still believe that quality news comes from newspapers only, though instantaneous current news one-liners will come through online media or social media sites. Editors should particularly choose what the readers want to read. This may vary from place to place (even inside a country). So the newspaper company's news distribution policy also should be flexible.

41. I think it's important that newspaper and media really focus on the need of the customers/readers. Come closer and dare to be even more local. Give the customer value, value, value all the time and combine this with the import role of a journalist. Follow the behavior of the young people - where do they spend time in the newsroom and what will they pay for? Customized content.

42. Newspapers will have to be the guide and guard of the society in every aspect. They must give the solutions for all the problems of their readers and safeguard their interests

43. I don't believe the fundamental role or mission of newspapers and the media will change significantly in the next five years; I do, however, believe that how we accomplish that goal will change significantly in that time. We need to have new workflows for gathering information, and new products that derive from that information: articles and photography will be important, but will be just two of dozens of different outputs of a fully integrated digital newsroom.

44. The fundamental role of newspapers in the next five years will change from an opinion leader to that of a shared information provider. The importance of newspapers will be less significance and will only cater to the older generation.

45. The fundamental role of newspapers would be to increase the awareness among people and there would be a competition between Electronic and Print media to grab the audience/readers with help of exclusive stories.

46. In my opinion, in a world in which there's a plenty of information, the role of newspapers must be "supplier of certified news".

47. I believe the newspapers and their digital products will become THE source for reliable and in-depth information on occurring events. As the internet provides the readers with more and faster news on what has happened and where the need for an explanation of the events becomes more apparent. We already see that the readers want more in-depth analysis rather than just information on what has happened. The readers want somebody to explain the events and the implications the event might have for the readers. Unfortunately we are not ready to provide them with solely this kind of analyses as we do not have the competencies needed. A handful of star journalists capable of delivering the analyses are not enough. We need to start recruiting better people and to train the ones with potential to become this new kind of journalists. This means that the newspaper (and their digital products) will need to let go of the thought of being fast and covering "everything". The newspapers (and the digital products) will

become more high-end and qualitative while leaving the fast reporting to others. Although, perhaps still the newspapers want to offer also some digital product with the fast news - a "stay up-to-date"-service. But that will most probably be an aggregate of news from different sources, more a list of news compiled from news agencies and collaborating media houses, perhaps even sniffing topics from social media and listing them as part of the news flow.

48. Newspapers will only survive with in-depth content and quality journalism, staying somewhat away from the race to publish unverified breaking news within minutes!!

49. I think the role will fundamentally change if it hasn't already. The New York Times recently released "NYT Now" with a slogan like: News at the speed of the digital age. I'm sure this make sense, but also raises the question of the purpose of news in the first place. Can we really get the story "at the speed of the digital age"? What do we lose in going to a one or two paragraph piece from a more in-depth article? I also fear that two distinct roles of the media -- to inform and to entertain -- are becoming blurred. Partly due to the short digital attention span, partly due to the reliance on advertising for revenue, the media are increasingly "advertising" for consumers, telling us what we like hearing about (being entertained) in order for us to keep reading/listening and BUYING, rather than telling us what we need to hear as citizens of a city/country/world. The danger here lies clearly in the stories that don't get told because they don't bring customers. Again, part of this is due to the rise of competitor sites that exploit our digital desire for short, entertaining news briefs to the detriment of the "hard news".

29. How can the WAN/IFRA organization best support these changes? What kinds of new programs, education, technology forums, professional interactions or research would be most valuable over the next few years?

No. Idea

1. More focus on the role of technology in media in the next 3-5 years. Help draw more young professionals into journalism and media.
2. Me being from a technical side of our industry keep pushing the boundaries
3. Giving a platform for this kind of discussion.
4. WAN/IFRA can support the newspapers/media industry in its growth path providing QUALITY training modules not just external but internal too. Technology innovations should be introduced to the industry. There should be a clear REGIONAL SENSITIVITY imbibed with every TRAINING programs. And it really helps. Build a QUALITY RESOURCE team for every REGION. This will help to reduce the cost implications of TRAINING sessions.
5. ?
6. Digital and data journalism. Newsroom organisation. Readers trends and needs.
7. I think professional interactions are the basis, whether it happens through congresses or web "get together" sort of speak.

8. Simplify the means to adopt and apply tools and services for measuring one's audience and their behaviour as it applies to one's advertising customers--in an economical way.
9. Training session on new formats will attract more people .More research on traditional print technology may enable us to provide more value additions.
10. More on latest examples of success stories in news media
11. By continuing to offer the latest and most relevant advice and education programmes. Provide more site visit type initiatives.
12. sharing successful innovations unite to combat/partner with competitors like Google
13. WAN-IFRA must remain on the cusp of innovation. Although understandable, its continuing allegiance to print and its consistent message that print will reign supreme for decades to come has to be put aside or the association stands to lose even more of the influence it has lost in past years. If it is to remain relevant, it must work closely with publishers to find the digital models that will continue to best serve communities with journalism and brands with advertisements while still turning a profit.
14. WAN can make publishers aware of meta trends, and can make publisher members aware of all of the emerging new services out there. WAN can also share experiences from within the membership thus helping publishers become aware of how best practice is being shaped.
15. Mobile services.
16. For inspiration - look beyond media companies. Why not invite Fitbit or Jawbone to speak at a conference for inspiration on wearables?
17. In programs and campaigns that reinforce the difference between professional and amateur journalism - and that this has a value that is worth to pay
18. How to be relevant for a consumer? How to understand the role of advertising as a part of relevant and interesting content? Cases how some newspapers have managed to keep readers to use more and more time with their brands. More results, not only plans how we are going to do...
19. Innovation has always been a big topic for WAN/IFRA and I think it is very important to have an organisation that gathers knowledge and distribute it widely to the industry.
20. Supporting innovation and culture change
21. Much of WAN/IFRA and other meetings of that kind end with an unspoken conclusion, that nobody knows what to do. It's a pity to listen to some presentations, where hopelessness is very badly disguised by some minor success stories. I think there's no much use searching for new businesses, especially in online world, which is a very bad business environment for anybody, except international moguls and small, lean innovative startups (hoping to be bought by moguls). There's no certain hope in Google Glasses or Samsung watches. There's a time to think out and develop completely different ways to finance the media companies, with strong representation of non-commercial ways (NGO, public financing etc.).
22. Journalists need to improve their craft --improve their writing. Training will play a key role. Leadership development -- the editors of yesteryears are journalists and not trained in management, I believe the editors of today and tomorrow are not only

"experts" but they must also embrace the rigors of management and strategic thinking if they are to navigate the new landscape and succeed in leading their troops to a better future

23. As you're doing now, presenting some development, structure, user case.
24. WAN / IFRA organization with professional interactions, research and publications is the best choice for a reference and guide to the evolution of editorial and print media
25. ??
26. By monitoring the evolution and working as a study center
27. Let people in the industry share experiences and learn from each other
28. From now on it's as much about new successful business models and innovations, as about new technologies.
29. News room integration
30. Learn how local media has responded and created products for local markets, create case stories of excellence and share experiences.
31. Audience content needs and gaps
32. More ways to exchange thoughts with colleagues worldwide, without having to travel (a online group)
33. Leave the print focus behind, open up to all platforms that can serve media and readers with the concept of being a newspaper for readers in the above described way. This is the direction news media in its core role will head towards, as there is no alternative. It is such an exciting world with endless possibilities, not only for media companies, embrace them, serve your members with valuable, curated information, high quality speakers and events and connect them to each other, stronger than ever before - collaboration and learning from each other is part of the solution!
34. Infographic training , big data training
35. It would be great to hear best practice examples of how this shift is being handled or how start-ups are successfully implementing those.
36. Ongoing technical support, education and development of new and emerging technologies for newspaper media.
37. Wan/ IFRA should gather any innovative which doing success from any publisher to share among us.
38. Don’t know
39. I believe Wan-IFRA can play a big role. Editorial staffs can be trained to change their mindsets. How to do more attractive coverages, designs, editorial innovations can be included in those programs.
40. Organize small conferences and make them available to more participants by lowering the price. Give us time to really meet each other so that we can talk. Like DagsVara but put in more space in the conference for participants to have time to talk. Perhaps you should give the newspapers tasks to solve together or try to solve.
41. As a forum to create awareness to change according to the new demands and as a

facilitator to grab the technological developments

42. Challenge our assumptions. Encourage us to try new things years before they may be fully entrenched. As an industry we mostly missed the mobile revolution, and failed to capitalize on tablets to their full potential. Don't let us do the same with wearables, or as mobile continues to prove more and more important to our readers.
43. I would like to see that WAN/IFRA focus more on the developments of integrated newsroom targeted at the developing world.
44. WAN/IFRA should organize programs in other regions also rather then only on Europe.
45. On the research part I would like to see studies that clearly concentrate on the different needs consumers have during different times of the day, week, year, life etc. One person can be both a print-reader (during evenings/weekends) and simultaneously addicted to fast online news. Another can be solely relying on news he/she find on social media. A third person only reads the print in the morning and then watches television during the night. We need to understand these behavioral patterns much better than we do today. And we also need to get information on which kind of content should be present in which channels and what the customers are ready to pay for. These are probably quite universal needs/trends, so WAN-IFRA could very well dig into this on behalf of its members.
46. Technology forums focused on digital printing: inkjet presses and hybrid printing

30. FINAL QUESTION: Has this survey been an effective way for you to provide your input on the industry and some of the changes that may be effecting us in the future?

No.	Items	Times Selected
1.	Yes	51 (92%)
2.	No	4 (7%)

** END OF SURVEY DATA **