

**Spring 2011
Industry Study**

Final Report
News Media Industry



The Industrial College of the Armed Forces
National Defense University
Fort McNair, Washington, DC 20319-5062



NEWS MEDIA 2011

ABSTRACT:

The news media industry is vital to the national security of the United States because of its critical contribution to an informed public which is integral to national interests and our unique form of democratic governance. While newspapers were once the public's sole source of information, citizens today get their news from a multitude of choices including radio, television, the Internet, and mobile phones. The rapid growth in the number and type of news dissemination methods, however, masks challenges within the industry including a precipitous drop in advertising which threatens revenues, monetizing the Internet, and the creation and control of content. Despite these challenges and the importance of the news media industry to our national security, government intervention to save fragmented and financially challenged segments of the industry is unwarranted. Adherence to free-market principles and continued application of the tools currently available to the news media industry are sufficient to overcome today's industry setback.

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Mr. Jim Dickmeyer, Faculty
Mr. Michael Lawrence, Faculty
Mr. Mark Foulon, Faculty
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PLACES VISITED/GUEST SPEAKERS

Domestic:

American Press Institute (Washington, DC)
 Associated Press (New York City, NY)
 BBDO Advertising GroupAtlanta
 Bloomberg (New York City, NY)
 Broadcasting Board of Governors/Voice of America (Washington, DC)
 CBS News (New York City, NY)
 CBS News Radio (New York City, NY)
 Center for Strategic and International Studies (CSIS)
 Columbia School of Journalism (New York City, NY)
 C-SPAN (Washington, DC)
 Discovery (Bethesda, MD)
 Department of State (Washington, DC)
 Federal Communications Commission (Washington, DC)
 Foreign Press Center (Washington, DC)
 Gannett (Washington, DC)
 Global Post (Washington, DC)
 Nielsen (Tampa, FL)
 New York Times (New York City, NY)
 OMD (New York City, NY)
 Poynter Institute (Tampa, FL)
 Pro Publica (New York City, NY)
 Project for Excellence in Journalism (Washington, DC)
 Senior Policy Advisor/Director for Communications for U.S. Rep Michael Honda (CA-15)
 St. Petersburg Times (Tampa, FL)
 Washington Post (Washington, DC)
 WTOP (Washington, DC)

International:

Istanbul, Turkey

Fox TV
 Hurriyet Daily News
 IHA TV News
 Independent Turkish Businessman
 Independent U.S. Journalist
 Professor, Koc University
 Samanyolu Haber TV
 U.S. Consulate General
 Zaman



Prague, Czech Republic

Bureau Chief for Bloomberg News
Czech TV News Media Representative
Professor of Media Studies, Charles University
Public Relations Representatives, Westinghouse
Representatives, Radio Free Europe
U.S. Embassy

London, United Kingdom

Al Jazeera English
BBC Global News
BBC Persian
IHS Jane's
London Media Hub, U.S. Embassy
Open Source Center, Directorate of National Intelligence
The Economist
The Guardian
Thomson Reuters
Sky News



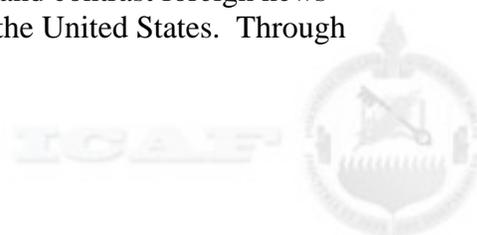
INTRODUCTION

One of the founding principles of the United States is the concept of consent of the governed. This “implies that the people of a country or territory are sovereign and consent, in a direct referendum or through elected representatives, to the establishment of their own government.”¹ The people, however, are incapable of providing their consent or to elect their representatives when they are uninformed about issues and choices. In the United States, the news media have primary responsibility for informing the public to the degree necessary for the successful governance of the nation. Without an informed public capable of providing its consent, the country risks its ability to govern democratically and, therefore, its national security. As President James Madison eloquently said in 1822, “a popular government without popular information, or the means of acquiring it, is but a Prologue to a Farce or a Tragedy, or, perhaps, both.”²

Since the founding of the United States, the news media have played a central role in informing the American people, helping them make educated decisions affecting their lives and national security. According to the Society of Professional Journalists, “to ensure that the concept of self-government outlined by the U.S. Constitution remains a reality into future centuries, the American people must be well informed in order to make decisions regarding their lives and their local and national communities.”³ While newspapers were once the predominant source of information, today’s citizens get their news from multiple sources including radio, television, the Internet and mobile phones. The rapid growth in the number and type of news dissemination methods, however, masks challenges facing the news media industry including a precipitous drop in advertising which threatens revenues, monetizing the Internet, and the creation and control of content. These challenges prompt consideration of the government’s role in ensuring the news media industry can continue to contribute to an informed public.

The news media industry’s role is vital to the national security of the United States because of its indispensable contribution to an informed public which is integral to our national interests and our unique form of democratic governance. Despite the importance of the news media industry to national security, however, government intervention to save the increasingly fragmented and financially challenged elements of the news media industry is neither warranted nor justified. Adherence to free-market principles and the continued application of tools currently available to the news media industry are sufficient to allow the industry to survive and thrive. This paper will explain the rationale for this position and provide alternate industry solutions so it can continue its role as informer of the American public, despite the rapidly evolving world in which it operates.

Over the last five months, our seminar of senior military and government professionals has met, questioned, and challenged members of the news media industry in our classroom setting and during site visits. Within the United States, the News Media Industry Seminar visited national and local publishing organizations and various print and broadcast entities in the Washington, DC area, New York City, and Tampa, Fla. In addition, the seminar traveled to Turkey, the Czech Republic, and the United Kingdom to compare and contrast foreign news media industries and their governmental involvement with that of the United States. Through



these visits, we gained a better understanding of the news media industry, its role in informing the public, and developed our paper's findings.

This paper is divided into the following sections: 1) Definition of the industry; 2) Current condition of the industry and its implication for an informed public; 3) Challenges facing the industry; 4) Outlook for the industry; 5) International contrasts and similarities; and 6) Role and responsibility of government in the news media industry.

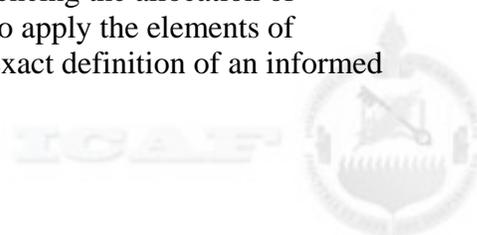
THE INDUSTRY DEFINED

One can define the news media industry as a collection of organizations that gather, develop, and produce content ultimately disseminated via various methods to consumers as news information. At one point, this definition coincided with the definition of "the mass media." It included the major network television stations, large metropolitan newspapers, and a handful of national magazines and news radio programs. The proliferation of mobile communication devices and the advent of social media have expanded the terms "news" and "media." It is helpful to divide media into traditional and non-traditional. Traditional news media outlets include legacy distribution platforms such as newspapers, television broadcasts, radio broadcasts, and news magazines. Non-traditional media outlets are loosely described as everything else, including dissemination platforms such as websites, blogs, social network tools like Facebook and Twitter, RSS feeds, podcasts, and streaming video over the web. In addition to the dissemination of content, both types of media outlets are also curators of news, where content is gathered, developed, edited, and produced for dissemination. News curation is a long-held function of the news media industry and its role and importance has expanded in today's fast-paced world, where speed competes with accuracy.

In a paper about press freedom and informed public opinion, Celia Rodrigues professes the role of media "is to bring accurate information to citizens and to discover and expose cases of corruption and of political opacity and abuses, working as a messenger of news, a connection point with the world and a democratic counterweight."⁴ In the United States, the news media are the conduit through which citizens gather local, national, and international news and information to enable their participation in the political and national discourse by forming opinions on public matters. The news media are also responsible for providing oversight and accountability of the government and those in positions of power in American society. As a watchdog, the press provides independent public viewpoints and scrutinizes the role of government and how it exercises power. This manner of holding accountable those in a position of power is a hallmark of democracy, helping to ensure dissenting voices are heard, even when they are the minority.

Informed Public

In an address to the U.S. Department of Energy, OMB Watch Policy Analyst Patrice McDermott stated, "An informed citizenry is the strength of a democracy."⁵ An informed public supports national security through voting for representatives, influencing the allocation of economic and military resources, and influencing representatives to apply the elements of national power to protect the United States national security. An exact definition of an informed



public is challenging, however author Terry Schultz provided a sound basis when he proposed an informed public has “sufficient and sufficiently reliable information or knowledge to be able to understand a subject or situation to make appropriate judgments or decisions regarding it.”⁶ This definition will be used in this paper as well.

The news media industry’s role in contributing to an informed public is well documented. In 2008, the Readership Institute at Northwestern University conducted surveys providing insight into the civic involvement tendencies of media consumers. The Reader Behavior Scores (RBS) showed frequent newspaper readers were more engaged in local civic affairs, were more likely to vote, and were more inclined to remain current regarding local and national issues.⁷ A study conducted almost 60 years ago by University of Minnesota researchers found a similar positive correlation between mass media and an informed public.⁸ Regardless of the media platform, Celia Rodrigues explains the news media supports and contributes to “the necessity of an informed, active, and involved public opinion, because it is a fundamental condition of the democracy and of the dynamics of an open society.”⁹

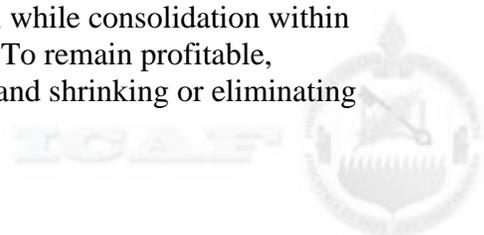
THE CURRENT CONDITION: Newspapers are declining in circulation and revenues while broadcast media have begun to stagnate. Non-traditional media are growing but do not provide revenues that can sustain professional newsgathering. The Internet has not filled the void, and the quality of news information is therefore threatened.

This section will examine the major sectors within the news media industry: newspapers, broadcast and cable television, radio and internet publishing, by looking at the state of each sector, its challenges and trends, and future outlook. While each is considered an industry in its own right, within the greater news media industry context, they are considered sectors.

Newspapers on the Decline

Despite the newspaper sector’s long and storied history of informing the public, today it faces numerous challenges. The sector is comprised of those companies which produce and distribute print newspapers.¹⁰ Newspaper publishers have experienced a precipitous drop in revenues from \$59 billion to \$34 billion, with revenue margins declining from 25 percent to only 5-10 percent over the last ten years.¹¹ Total advertising, which normally accounts for up to 80 percent of a newspaper’s revenue, has dropped almost 45 percent since 2004.¹² Print circulation of newspapers has dropped from 59.4 million in 2000 to just over 46 million in 2009.¹³ A pronounced demographic shift is underway that skews towards a younger cohort who are more comfortable with acquiring news from an electronic device rather than a printed newspaper. Other forms of media, such as the Internet, tablets/e-readers, mobile devices and social media, compete with newspapers to deliver the news more quickly, constantly, and in multi-media formats.

Today’s newspaper sector faces declining sales and advertising revenues as well as higher newsprint and distribution costs. New media and changing consumer habits present a greater threat to newspapers than rival newspaper companies, as few major U.S. cities currently support more than one daily newspaper. Barriers to entry into the market remain high for newspapers due to large, upfront costs for publishing and delivery, while consolidation within the sector is increasing as larger newspapers absorb smaller ones. To remain profitable, publishers have cut costs by reducing the size of their newsrooms and shrinking or eliminating



domestic and overseas bureaus. The Pew Research Center's State of the Media Report for 2011 Project notes a 30 percent decline since the year 2000 in newsroom jobs.¹⁴ They are also relying more heavily on consolidated reporting from agencies such as Associated Press (AP) and Reuters.

To attract and retain readers, newspapers are creating online interactive formats to increase circulation for their printed editions and have developed smaller, on-the-go versions of their larger daily papers. Publishers are also focusing on local reporting, which is more directly relevant to the lives of readers. Local reporting focuses on community issues ranging from school board and local government decisions to high school sports teams. To recapture the revenues lost to free Internet news, some newspapers have implemented pay walls for online content. Under a pay wall system, the newspaper charges non-subscribers to access online content. There are two principal models of pay walls: one which charges for all Internet content; a second which applies a sliding pay scale, allowing customers a certain number of free stories before paying for any additional online access.

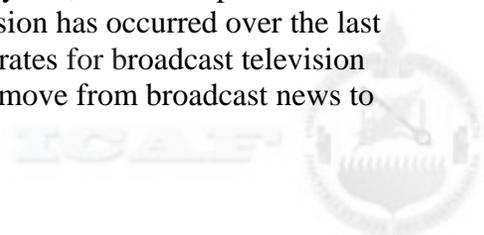
Without drastic changes to their current business model, hardcopy newspapers cannot thrive or survive. Newspapers must develop a holistic solution including quality content and multiple distribution platforms, and should address demographic trends and advances in technology. Newspapers continue to be relevant, especially to traditional newspaper readers and those who cannot afford or do not prefer digital delivery.

Magazine publishers are less dependent than newspapers on advertising and have been quicker to adopt online distribution, including pay walls. The recent economic crisis has hurt magazine and periodical subscriptions, however, the magazine and periodical publishing industry will gradually grow as consumer and advertising spending increases over the next five years to 2016.¹⁵ With the proliferation of mobile devices, magazine publishers will pursue new revenue streams and increase their use of mobile-access technology to reduce distribution costs. The magazine format, which typically includes more photographs than newspapers, translates well into a digital format. Many have already adopted pay wall pricing structures for their on-line content. Magazines focused on niche content, such as sports news or food, have attracted a readership willing to pay for their differentiated product.

Television: Cable Healthier than Broadcast

There are two models within the television sector: broadcast and cable. Television broadcasters operate studios and facilities that program and deliver audio-visual content to the public via over-the-air transmission. The cable network sector is comprised of companies that operate studios and facilities for distributing television programs on a subscription or fee basis, primarily through cable or direct-to-home satellite systems. This sector definition excludes cable and satellite television operators that solely provide online content.

Broadcast television derives its revenues almost entirely from advertising, while cable television benefits from a dual revenue stream of cable subscription fees and advertising. Although total television viewership has remained steady over the years, when compared head-to-head, a significant shift of viewers from network to cable television has occurred over the last thirty years for both news and general programming. Advertising rates for broadcast television are directly linked to the number of viewers. Thus, when viewers move from broadcast news to



other media, or when advertisers choose to move advertising to other media, broadcast television revenues suffer. Responding to lower revenues, the major broadcast news networks, ABC, NBC and CBS, have cut costs by reducing staff and closing domestic and foreign bureaus. Their 2010 profit margins range from break-even for CBS to a high of 10 percent for NBC.¹⁶ NBC News has devised a resilient and balanced business presence within the network, cable, and Internet news environments, with cable and Internet revenues shoring up the broadcast network news by providing stable revenue streams during periods of uncertainty. With a multi-platform approach, NBC can pool its news gathering resources and create economies of scale.

Although the major cable news programmers, CNN, Fox News and CNBC, have experienced reductions in viewership over the last decade, they showed operating profits in 2010 ranging from 7 percent to 17 percent, due to their dual revenue stream and cost cutting efforts.¹⁷ These rates are expected to drop as cable providers face increasing competition by online streaming, downloads, and digital video recorders.¹⁸ Barriers to entry in both cable and broadcast television are high because of the high capital investment, as well as registration and regulatory requirements.

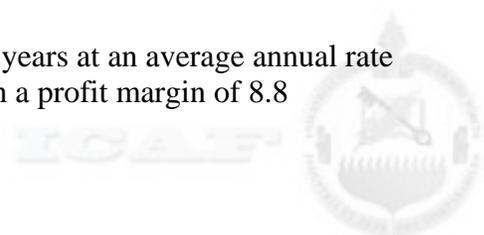
Cable and broadcast news networks face challenges in the defection of viewers and accompanying decreasing advertising revenue. This will eventually lead the networks to overhaul their current news format. While television remains the most popular source for the general population to get its national and international news, the Internet has surpassed television as the primary news source for 18-29 year olds, and is nearing the rate for television in the 30-49 year old age group.¹⁹ As with newspapers, more cable and broadcast networks are developing their multimedia platforms in an attempt to reach the under 50 demographic.

In contrast to broadcast and cable news, the PBS News Hour retained its viewer share, which at 1.1 million viewers is about one-sixth the number of the commercial news audience.²⁰ The News Hour is twice as long as the broadcast evening news programs and is considered to provide more in-depth analysis of news issues. PBS has also expanded its on-line presence, attracting more viewers to its site in 2010 than in the previous year. However, PBS relies heavily of Federal funding and expects this support to decrease for its next fiscal year. Private foundation and corporate grants, member station fees and viewer donations also provide funding for the PBS. In March 2011, the House voted to cut federal support, and President Obama's 2012 budget also includes reductions in federal support for Public Broadcasting.²¹

Radio Also Facing Online Competition

The broadcast radio sector consists of radio stations and networks that create content or acquire the right to broadcast prerecorded radio programs through AM, FM, and satellite radio channels. Commercial radio stations are usually owned by private corporations and revenue comes primarily from the sale of advertising time. Educational and noncommercial stations generate revenue primarily from donations by individuals, foundations, government, and corporations and are primarily owned and managed by public broadcasting organizations, religious institutions, or school systems.²²

While broadcast radio revenues declined over the past five years at an average annual rate of 3.6 percent, in 2010, the sector realized \$2 billion in profits with a profit margin of 8.8



percent.²³ Much of the reduction is attributable to the downturn in the economy and the accompanying decline in advertising revenues. Radio is at near total saturation, with approximately 93 percent of the population listening to radio.²⁴ Consequently, the projected growth rate is only 1.6 percent for 2011 through 2016.²⁵

Approximately 12.9 percent of all radio programming is news and talk radio, and this figure grew slightly over the last five years.²⁶ However, there are only thirty “all news” commercial radio stations in the United States.²⁷ Noteworthy in this category is National Public Radio (NPR), which has a very small share of the radio market at 1.1 percent, but has seen steady audience growth as news has disappeared from commercial radio.²⁸ Predominantly supported by station programming fees and grants from foundations, it receives a small amount of government funding, which is under increasing scrutiny. NPR’s revenues are expected to grow by about 3 percent in 2011 because of its sponsorships.²⁹

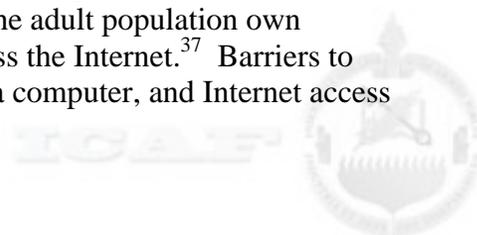
Radio broadcasting faces an increasing challenge in competition from online streaming media, satellite, and digital radio. An estimated 17 percent of the population listened to radio online in 2010, up from 14 percent in 2006.³⁰ The bulk of radio listening continues to be during commutes and in cars, garnering between 30 to 60 percent of listeners, depending on the time of day.³¹ However, the decline in advertising revenue is squeezing radio’s profit margins at an unprecedented rate. Built-in car radio iPod adapters, phones with streaming radio applications, and subscription-based content with less advertising also pose considerable challenges to traditional broadcast radio.

Radio stations have also expanded their multimedia profiles. Using interactive websites, they are linking video and additional information to the stories heard in their primary form, in an attempt to hold, expand, and enhance their consumers’ listening experiences. Almost universally, they are present on Twitter and Facebook. Individual journalists are also expanding their use of social media to appeal to a broader audience.

Internet Publishing and Social Media

The Internet publishing sector encompasses organizations or individuals which publish or broadcast news, videos, images, or written content exclusively over the Internet.³² It is currently upending the way in which all forms of news media function, by allowing every person to be his or her own reporter, editor, and publisher. In the online sector, revenues have grown 21.4 percent annually from 2006 to 2011; in 2011, they are expected to grow 18.8 percent to \$38.7 billion.³³ Industry experts forecast continued growth of 6.8 percent for the period of 2011-2016.³⁴ For the first time in 2010, advertisers spent more money on Internet ads than for newspaper ads: however, most of this money is spent on non-news sites.³⁵ Parsing revenues strictly attributable to news sites is difficult at this time. News brings in the most number of unique visitors of total Internet publishing and broadcasting, at approximately a 27 percent share.³⁶

The sector is in a high-growth period and will continue to prosper as broadband penetration increases. Technology is changing the way the consumer experiences media, as people shift to mobile and tablet devices. Eighty-four percent of the adult population own mobile telephones, and two-thirds use their mobile phones to access the Internet.³⁷ Barriers to entry for the at-home blogger or journalist are minimal. An idea, a computer, and Internet access



are the only requirements. For larger companies, entry barriers remain comparatively low as the cost of computing and processing power continues to decrease. While the number of jobs in the sector has grown 13 percent annually over the past several years and will continue to grow in the future,³⁸ the majority of the new entrants are self-employed entrepreneurs, i.e. bloggers and opinion writers, not employers. Self-employed entrepreneurs are perceived to earn lower salaries than their counterparts who are employed by small, medium, or large firms.

The greatest challenge to Internet publishing is quality control and journalistic integrity. Although content and the number of contributors to Internet publishing will increase, offering greater diversity, journalistic editing and fact-checking services are generally only provided by the established news producers. This will continue to lead to misinformation entering the public square, which can remain on the Internet forever. The discerning audience will continue to seek out multiple sources for information, but others will not. Major Internet news providers including Google, Yahoo and *The Huffington Post*, generate their own stories and link to stories generated by other news organizations. However, a number of the news providers simply bundle news from newspapers, rather than producing their own news stories.

Social media tools, while relatively new to the news media industry, are having a profound effect on the way news media is created, distributed, and consumed. Social media can quickly generate interest and concern around a particular issue, news item or piece of information. Social media allow users to engage in the creation of content, or link to information of interest and to share this content with either a specific list of like-minded friends, or with the entire online audience. Major social networking sites include Facebook, Twitter, Linked-In, YouTube, My Space, and Diggs.

Social media use is one of the fastest growing online activities with more than five billion minutes collectively spent on sites each day.³⁹ Social media are quickly outstripping traditional Internet sites in audience usage, yet none of these sites even existed six years ago. ABC, CBS, and NBC, which have each had an online presence for over ten years, have roughly 10 million unique visitors monthly while approximately 250 million visitors access Facebook, Twitter, and Linked-In each month.⁴⁰ The Pew Report estimates that approximately 50 percent of online news consumers use social media sites for their news and information.⁴¹

Internet publishing and social media tools will continue to challenge the traditional forms of the news media industry into the future. Traditional news media organizations will need to leverage these media and develop new applications to coalesce large numbers of users around the news and stories they produce or risk falling further behind. Internet publishing challenges traditional news media organizations because it exacerbates the tension between getting a story right or getting the story first. Citizen journalists use the Internet, including social media, to disseminate a narrative quickly, without the rigorous fact-checking standards traditional news organizations employ. In response, the traditional news organizations face pressure to jump on the story that may not be accurate or to hold off reporting it until it can be substantiated. The risk in waiting is that the newspaper could be scooped by a competitor, thereby losing readers, advertising and prestige.



Monetizing the Internet

In the near term, advertising will continue to serve as the primary source of revenue underpinning the Internet publishing sector. For the first time, in 2010, companies spent more money in online advertising than they did in print newspapers⁴². However, Internet advertising is not as effective as its print or television counterparts. It is generally accepted that less than one percent of users actually click on the links of Internet advertisers.⁴³ To increase advertising effectiveness, networks are pursuing customized links between products and audience demographics. As an example, the online advertising industry is developing software to target ads based on age, sex, location, and income as well as to nine-digit zip codes based on cable television usage data.

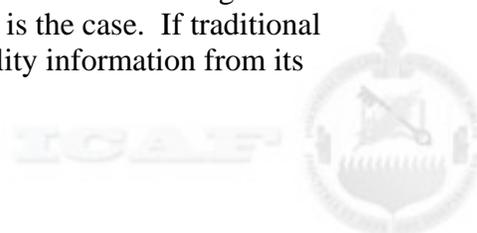
There is a school of thought, popularized by *Wired* magazine's editor Chris Anderson, which believes all information on the Internet should be free.⁴⁴ Anderson argues that technology has brought the cost of transmission and storage on the web down to near zero and content should follow accordingly. An influential voice in the online world, Anderson is popular particularly with the younger generation which has grown up with free internet. However, there are flaws in his argument, which doesn't account for the money required to produce the content nor how companies can recoup those costs. For example, many newspaper publishers initially offered their content for free on the Internet, not realizing the extent to which the medium would erode their subscriber base and accompanying revenues.

Implications for an Informed Public

Newspaper reporting forms the basis of stories covered by other elements of the news media industry, such as radio and television, and provides more in-depth information to stories delivered by other media within the industry. While the newspaper's role as an informer of the public is not as far-reaching as it used to be, one cannot minimize its relevance as a source of information to the general public.

Covering the news is not inexpensive. Newspapers, radio, and television companies make significant investments in their labor forces and physical plants. As input costs rise and revenues decrease, traditional media are under stress to finance newsgathering. One newspaper executive, for example, estimated it cost \$500,000 annually to maintain a reporter in a war zone.⁴⁵ Yet, as the U.S. continues its involvement in multiple combat operations, the public needs the information provided by embedded journalists to make informed decisions about resources. Even closer to home, reductions in newsroom staff affect the ability to cover local and national news. While the raw information may now be found on a variety of websites, the analysis previously provided by traditional media may not exist.

News media sectors are adapting to new technology in order to compete. Major newspapers, radio, and television have established a presence on the internet, investing heavily in developing a multi-platform. They are present on Facebook, Twitter and Linked-In. Traditional media incorporate social media links onto their websites to encourage their readers to "like" or "recommend" their stories to a greater audience in hopes of attracting new readers. However, Internet publishing will enjoy a competitive advantage over traditional media as long as its costs for news gathering are significantly lower. For news bundlers this is the case. If traditional media continue to shrink, the public will have to demand high quality information from its



internet publishers. Even if the newspaper becomes obsolete, something which functions as a newsroom will still be necessary to gather information and analyze the issues.

There is a segment of the population which has and will continue to seek the news information it feels is necessary to stay informed on current events. NPR's growth is an example of this. There is also a segment of the population which is willing to pay for its news through either subscriptions or donations. High quality publications such as *The Economist*, for example, have successfully sold their content behind pay walls to a public which believes it is receiving differentiated content that warranted paying subscription fees. This paper argues that although market transformations will temporarily disrupt traditional methods by which the public receives information and news, the public will drive the market to find an equilibrium that benefits both the public and the quality of information it receives.

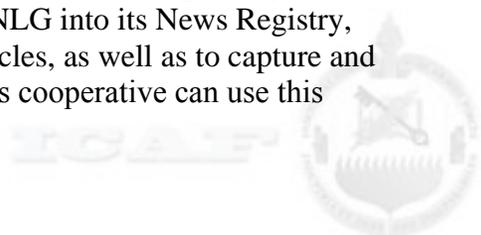
CHALLENGES: Numerous challenges confront the news media industry.

Protecting Copyrights and Data

Numerous copyright issues pose problems for both print and television journalism. Print journalists are increasingly losing control of their work to online news aggregators, who bundle stories without attribution to either the original authors or sources. Many news websites and aggregators do not include links to original content, and web publishers do not provide compensation for the use of their articles. Television networks have limited the number and variety of programs available for streaming or downloading on free television sites such as Hulu in order to protect broadcast advertising revenues. Cable producers are concerned that technology which offers their proprietary content free on mobile devices jeopardizes their income from cable usage fees. All producers are concerned about capturing viewer data in order to better understand their customers. This is critical to the business model where success depends on meeting customer demand. However, platform providers currently retain user data and are not sharing this information with the news generators. For example, with online news consolidators, the viewer data and demographics reside with Google or Yahoo, not with the newspaper companies generating the articles.

Across the various platforms, companies are beginning to take action. Channel owners Discovery Communications, Fox Cable Networks, Scripps Networks and Viacom took legal action against Time Warner Cable (TWC) in April 2011 regarding content rights of a new TWC application that allows for streaming of cable programs onto tablet devices.⁴⁶ In the suit, Viacom asserted that TWC's app presented "unlicensed distribution of Viacom's programming," whereas TWC believes its contractual agreement allows for in-home viewing.⁴⁷ The channel owners, themselves, want to capitalize on revenues from on-line streaming, rather than see that income go to the cable company. Industry experts believe this case could establish a precedent for the television industry as new media devices blur the lines between programming suppliers and distributors.

On another front, the AP is launching a new initiative, the News Licensing Group (NLG), to track and police the use of its content. AP will incorporate the NLG into its News Registry, which it formed in the summer of 2010 to electronically tag its articles, as well as to capture and trace unauthorized usage.⁴⁸ The news organizations that form AP's cooperative can use this



information to understand the demand for their products and more importantly, get paid for their news articles. Currently, many news consolidating websites simply reuse source articles without paying for the content. Many companies have been reluctant to prosecute copyright infringements by news consolidators because company executives believe they have neither the time nor resources to take legal action in every case of piracy. However, news media executives increasingly believe the tide is turning and more companies now realize they must pursue copyright infringements if they are to survive, particularly as they struggle to offset losses in other aspects of their business.

Viewing Habits

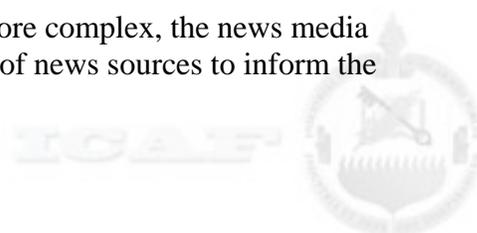
In December 2010, 41 percent of Americans cited the Internet as the place where they got most of their news about national and international issues, up 17 percent from 2009.⁴⁹ The Internet also overtook newspapers as the primary source of news, surpassed only by local television news, which is the source for 50 percent of Americans.⁵⁰ The new, unpredictable element in digital is mobile. Forty-seven percent of Americans say they get some kind of local news on mobile and wireless devices. As of January 2011, seven percent of Americans owned electronic tablets, nearly double from four months prior; and six percent of American adults have electronic-readers.⁵¹

Smart digital platforms increase the time citizens spend reading and viewing the news. In 2000, people spent 57 minutes a day on average receiving news from television, newspaper, and radio⁵². One decade later, time spent receiving news collectively from those same sources remains unchanged. However, the number of people claiming to view news programming at a regularly scheduled time has decreased nearly 12 percent since 2006.⁵³ Readers now spend an additional 13 minutes reviewing news via the Internet, bringing the daily average to 70 minutes.⁵⁴ The Pew Report notes this as the highest total since the mid-1990s, yet it does not account for time spent accessing news content on smart phones or other digital devices.⁵⁵ The growth in Internet publishing has presented challenges to journalism companies across all platforms. A.C. Nielsen reports that the average time spent simultaneously using television and Internet in the home grew 9.8 percent from 2009 to 2010, reaching close to four hours per month.⁵⁶ It is not clear that the additional time spent reviewing news on the Internet or on mobile or wireless devices directly translates into a better informed public. For example, social media sites often only provide links to the actual articles/stories. Unless the consumer clicks through to the story, he or she is only grazing on headlines. This also applies to Twitter, which while increasingly popular, cannot provide in-depth understanding of an issue in only 140 characters.

OUTLOOK: Future health of the news media industry

According to Internet culture commentator Clay Shirky who compares the Internet to the revolutionary effects of the Gutenberg printing press, “We are collectively living through (the year) 1500, when it’s easier to see what is broken than what will replace it.”⁵⁷ There are attempts to reinvent the current model of the newsroom to make it more financially viable, but these tend to be modifications to the current system, rather than the creation of a new model.

As the world becomes more globalized and its problems more complex, the news media are still required to make sense of events, despite the proliferation of news sources to inform the



public. The digital age offers the news media industry new opportunities and new perspectives about covering the news. At the same time, the traditional economic and business models for the news media industry are losing revenue and viewers to emerging new media. The news media industry, in all its sectors, must find new models to reverse these trends.

While there is no certainty about what the new industry will look like, our seminar discovered a number of trends throughout our study. Across newspapers and television, our interviewers told us newspapers, specifically, their newsroom journalists, set the agenda for broadcast news and radio. Newspaper journalists are the principal discoverers of news stories, from happenings at the local courthouse, to the international battlefield, to investigative news. Despite significant workforce reductions, newspapers continue to employ far more journalists than the other media. When newspaper owners fire journalists to cut costs, they must reduce the number or scope of the stories they can cover. This affects the quality and amount of the news to which the public has access.

Newspapers targeting niche markets appear to be in a better financial situation than the general newspaper market. Consumers accord value to business and economic news, and are willing to pay substantial fees for this information, as a service, and through a pay wall. Local reporting, which focuses primarily on the news and issues that affect readers, such as county or state political processes, local school news, sports and traffic, is also on the upsurge. Much of this local reporting and editing is done by local readers who may have little, if any, practical journalism training but who nevertheless attempt to provide an outlet for community news and information. Established journalists traditionally offered news analysis and historical context to enhance the public's understanding of an issue. It is not yet clear whether the local reporting will be able to provide this same service.

Proliferation of News Outlets

The proliferation of news outlets will continue as new entrants set up digital and online news sites. Existing media organizations will try to keep up by establishing alternate channels for their news content. More is not necessarily better when it comes to information. A democracy depends on a citizenry informed by the free flow of news and independent journalism that continuously casts a skeptical eye on government and the powerful in our society. However, it functions better with news that is well-researched and credible. In the pressure cooker of today's minute-by-minute, Web-driven, do-more-with-less news culture, most of today's news is underdone.⁵⁸ Some editors believe it is better to be first with the news than be right. *TechCrunch* founder Michael Arrington illustrated the perspective when he offered, "Getting it right is expensive. Getting it first is cheap."⁵⁹

Ironically, a wider choice of outlets can result in a more narrow view. As media outlets develop niches in the saturated market, many of these outlets draw people in by appealing to specific market segments, including those based in political ideology. While there are a diversity of outlets available – including access to international perspectives which might offer contrarian views – they must be sought out. As online content providers seek to monetize the Internet, they attempt to target viewers' interests by narrow their perspective. This could have a negative impact on the ability to ensure multiple sides of issues are fully addressed.



New Models?

The news industry is grappling with operating profitably in the internet-heavy future. What are often held up as alternative models of journalism, however, such as Pro Publica and Global Post, appear to be structured similarly to conventional newsrooms, albeit in a lean, low-cost model. Pro Publica, an exclusively online investigative newsgroup, was initially funded by a generous benefactor. Three years into its existence, it is looking for a more conventional revenue stream, developing a greater pool of individual donors, and continuing to solicit large grants from foundations. The Global Post, an online news organization focusing on international news, also depends on a mix of investors, foundation grants, and reader contributions. The late Sidney Harmon bought Newsweek magazine because he “was interested in contributing to the national debate, which he saw as a public trust.”⁶⁰ At the time of the purchase, Harmon announced he was willing to lose \$40 million a year in order to get Newsweek to break even.⁶¹ There are some extremely wealthy individuals willing to subsidize good journalism, but as a long-term strategy, this creates the possibility of an owner exercising undue influence over journalistic content.

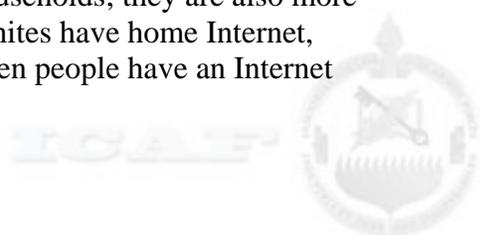
One new example of monetizing journalistic content is The Atavist, a newly launched application for iPad and tablet which focuses on long non-fiction pieces. It capitalizes on the ability to link to videos, and additional information while offering a simple text article for between \$1.99 and \$2.99. The Atavist began in January of 2011 with an initial investment of \$20,000 and has offered three stories to date, with over 40,000 downloads.⁶² The Atavist pays reporters a fee to cover reporting expenses and also split the revenues. While this is still in the nascent stage, it demonstrates how non-fiction journalism, including longer news pieces, can be profitably marketed.⁶³

Political/social factors

How and where consumers obtain their news is changing dramatically. High speed and mobile computing allows consumers to scan numerous traditional news media institutions, peruse alternative media organizations that strictly reside on the web, and review blogs or social media sites to obtain thoughts and opinions. The voice of the individual, articulated through social media, can have the power to coerce individuals, communities, and companies to change their behavior as we have seen in recent political uprisings around the world. For example, in Egypt, activists used social media to announce demonstration sites; used their mobile phones to photograph government reaction to the demonstrations, and then uploaded the information onto social media sites, spreading the news locally and internationally, thus galvanizing support for their activities.

Demographics and news habits

Not everyone has been able to take advantage of multi-platform information, however. Disparities exist between the news information-rich and the news information-poor, largely due to socio-economic status, physical region, race and age. Households earning more than \$75,000 a year significantly outpace households earning less than \$30,000 a year in access to and use of the Internet and other technological devices.⁶³ Ninety-five percent of high income households use the Internet at home compared to 57 percent of low income households; they are also more than twice as likely to read online news.⁶⁴ Sixty-five percent of whites have home Internet, compared to 52 percent of blacks and 45 percent of Latinos.⁶⁵ When people have an Internet



connection at home, they are more engaged in public information and news than people who rely on access from work, a friend's house, or a phone.⁶⁶ High-income households are also more likely to own computers, tablets, and other entertainment devices to augment how they receive news.

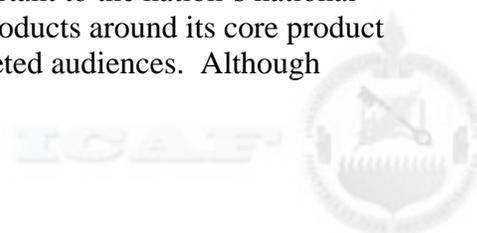
The national broadband map created in 2011 by the Obama administration shows many people and community institutions lack broadband service. Regardless of income level, those living in rural areas fall behind in high-speed Internet access. At some income levels, those in urban areas are 50 percent more likely to have Internet access than those earning the same income in rural areas.⁶⁷ Low income households in rural areas are the least connected, with connectivity rates in the single digits for both computers and Internet access.⁶⁸ As rural locales fall further behind the rest of the country in access to modern communication, the downsizing of local newspapers and radio stations sometimes leaves rural citizens without accurate information, breaking down opportunities for dialogue between rural and urban communities.⁶⁹ As an example of this disconnect, Illinois House Bill 1869, which would remove public notices from newspapers and place them on local government websites instead,⁷⁰ potentially disenfranchised many taxpayers, minority groups and others who do not use or have access to the Internet.

Recommendations for Industry

Although this paper is principally designed to provide policy recommendations to government decision-makers, there are a number of policy recommendations that emerge for industry leaders and practitioners.

Professionalism: Media executives across the country are experimenting with business models of all types to save their organizations, but they should look closer to home for other solutions. Recognition of the industry as a profession may be a potential solution to the threat posed by new media entrants. If established media outlets are to compete with upstarts, they must trade on their credibility and professionalism. Product differentiation, by demonstrating the superior quality of their reporting, could protect established media from new challengers. If they join new media in seeking public attention through low-quality titillation and empty spectacle, they will probably fail. Collectively, news media industries could use existing professional organizations to organize themselves and create a code of ethics and principles. With the professionalization of journalism in the 20th Century, working journalists developed a set of standards that have guided the mainstream media. As one journalism critic remarked, “Among those standards: accuracy above all else, plus fairness, balance, thoroughness, independence, civility, decency, compassion and responsibility—along with a clear separation of news from opinion.”⁷¹ The problem is that as the dichotomy between mainstream and digital media vanishes, the standards one has come to expect from our journalists are also disappearing. The industry must devise a method of self-policing to promote quality based on professionalism and consistency.

Multiple platforms: Newspapers should consider a holistic solution that includes quality content, multiple distribution platforms, and leveraging demographic trends and advances in technology to maintain its role as public informer on matters important to the nation’s national security. News organizations must develop a broad portfolio of products around its core product of the traditional newspaper to connect with both general and targeted audiences. Although



convergence across newspapers, TV, and radio has been a cherished industry buzzword for years, the portfolio approach focuses primarily on the Internet and print rather than on traditional radio and television (one exception is the Washington Post, which launched programming on a local radio station in March).⁷² Media organizations can achieve some efficiency by using a single newsroom to feed material to multiple channels and platforms. Consolidation and multiple distribution platforms may not answer all the issues of diminishing revenues but will offer mainstream media some footing to compete with new entrants.

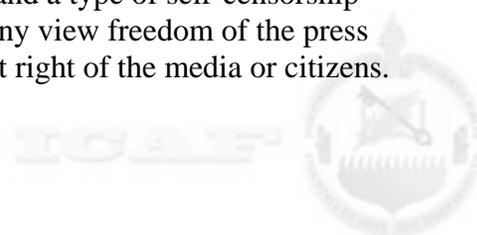
Specialization: The role of public informer, however, will not sustain the newspaper business. Providers of specialized news information, such as the Bloomberg, Dow-Jones, the Financial Times of London, Jane's Defence Weekly and The Economist, have successfully charged for their services for many years through pay walls. Unlike general news, the consumer perceives this differentiated information as valuable and is willing to pay for it.

New Revenue Streams: Ultimately, the platform from which people get their news will reap the most advertising dollars to finance its news collecting. Few, if any, newspapers will survive on subscription revenues alone. Whatever the outcome, the current models for news journalism are not sustainable. As technology changes societal habits, the industry must adapt and modify its practices to better capture its intellectual property rights and find new models to monetize their products. Ultimately, if there is no print journalism there will be no raw content for aggregators such as Google, Apple, and Yahoo, to consolidate. Some point to the success of Apple's iTunes as proof that the public will pay for content, while others point to the public perception that Internet content is and always should be free. Free is not a business model that can pay journalists' salaries. Some news groups, such as the *New York Times*, are attempting to capitalize on Internet readership through pay fences, which allow the customer to read a limited number of articles per month free before charging for access. Print subscribers receive free access to the entire site. Because this effort only began in March 2011, it is still too early to evaluate its success. The News Media Industry must continue to consider new revenue streams but also shift the paradigm to one that is willing to pay for news, regardless of the distribution platform. The industry must create a position on the web similar to the paradigm shift cable television successfully launched in moving Americans from the notion of "free" television to a monthly cable subscription.

INTERNATIONAL CONTRASTS AND SIMILARITIES

In travel to Istanbul, Turkey, Prague, Czech Republic, and London, United Kingdom, the students of the News Media Industry Seminar tested their ideas about the U.S. media industry against conditions in selected countries. After visiting with noted and award-winning news media companies such as Al Jazeera English, Fox TV Turkey, *The Guardian* newspaper, The Economist magazine and the BBC, four key themes emerged:

The interpretation of a free press and free speech are quite different outside the United States: In Turkey, media suffer government-imposed censorship and a type of self-censorship that run counter to the U.S. concept of freedom of expression. Many view freedom of the press as a privilege allowed by the government rather than as an inherent right of the media or citizens.

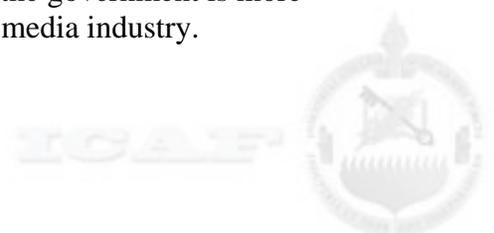


The Czech Republic continues to emerge from the strict state-controlled media of its communist past. Journalists are learning how a free media can effectively operate to inform and educate the public while the citizens are demanding a media more probing of its government. In the United Kingdom, freedom of the press isn't guaranteed by law; however, other laws protecting military secrets and individual privacy exist that are more restrictive than those in the United States. Despite these restrictions, the British tabloid press is well-known for its coverage of scandals involving politicians, athletes, and other public personalities.

The concept of media as the watchdog of big business and government is limited in Turkey and the Czech Republic: The government of Turkey allows the media to operate as a business with most media owned and operated by large conglomerates. Because these conglomerates respond to issues of power, influence, and political advantage, they do not seek to inform citizens regarding the acts of government and business; rather, many seek to manipulate public opinion for political gain and influence. In some cases, newspapers and magazines are actually an arm of the government or are controlled directly by religious organizations or political movements. In other cases, wealthy individuals purchase newspapers as trophies to be used as a vehicle to promote their personal political agendas. Because of a history of communist control of the media in the Czech Republic, the general public is sometimes apathetic about commenting publicly on the actions of its government. This feeling is changing as citizens become aware of the power of the press to investigate and they are beginning to demand journalists look more closely at the government's performance. Journalists, for their part, are just learning how to conduct the investigative journalism necessary to become the watchdog of business and government and to inform the public of its findings.

The economic challenges to the news media industry in the countries visited are similar to those in the United States: Declining operating revenue, a reduced advertising base, loss of subscribers, and competition from new dissemination platforms are all issues facing the news media industry in the countries visited. These challenges are remarkably similar to those facing the American news media industry. In addition to these common challenges, the news media industry in some countries is facing its own unique challenges. For example, the Czech journalism profession is waning among university students because of low wages and the view that journalism is a stepping stone rather than a lifelong career. In the U.K., the print and broadcast media are facing restrictions put in place by the courts to protect the privacy of public personalities. Finally, most Turkish newspapers operate at a loss and are sustained by deep-pocketed conglomerates or by wealthy private owners with strong ties to the ruling government. As a result, the impartiality of the Turkish press is often called into question by Turkish citizens and even by Turkish journalists themselves.

The government plays a more active role in financial support and content controls than in the United States: The United States government plays a relatively minor role supporting the domestic news media industry. Outside of minor indirect subsidies for dissemination, limited legal regulation of the industry and broad support for freedom of the press, the U.S. government is not involved in the news media. This is due in large part by its desire to remain impartial. In contrast, in Turkey, the Czech Republic, and the United Kingdom the government is more involved in financial support and content management of its news media industry.



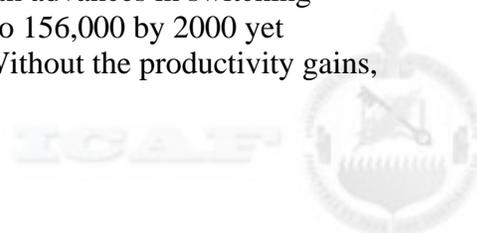
An example of the contrasting level of government involvement in the news media is the U.K.'s British Broadcasting Corporation (BBC). Although independent of government control, the BBC receives financial support through a television licensing fee that is deposited into a fund controlled by the British government. These funds support the domestic and international news broadcasts. Although this government-backed financial support gives the BBC an operating advantage to fulfill its charter to “inform, educate and entertain,” its domestic competitors, such as SkyNews, support the BBC’s government support. From the U.S. perspective, government support to a similar organization in the U.S. media industry would lead to charges of tilting the competitive landscape in favor of one company over its competitors. There would also be concerns of unacceptably influencing the content to the detriment of an informed public.

GOVERNMENT GOALS AND ROLES

As this paper has demonstrated, the news media industry is going through a profound transformation as American news consumers pursue alternate channels for finding and consuming information.⁷³ Some worry that as news media platforms proliferate, consumers will have fewer sources of quality reporting. From their perspective, the decline in quality reporting will result in what some media executives call “junk masquerading as news”⁷⁴ or “new-esque”⁷⁵ content. Similarly, others are concerned that the decline of the traditional print media and the rise of non-traditional digital media will leave gaps of knowledge and information among the public, which government should help repair through public policies. Supporting public policy rationales, others argue for some form of government subsidy to sustain declining media.

This paper, however, concludes that the United States is on the verge of a new era in which consumers of news, rather than producers, will have access to increasingly sophisticated and varied sources of information that will enrich the marketplace of ideas. The market is facing creative destruction caused by significant technological shifts and changing customer preferences that disrupt current business models and means of news dissemination. In *Capitalism, Socialism, and Democracy*, Joseph Schumpeter described creative destruction as “the opening up of new markets that incessantly revolutionizes the economic structure from within...destroying the old one...creating a new one.”⁷⁶ According to Schumpeter, this process is the essential aspect of capitalism where innovation, technology, and competition from “new consumer goods, new methods of production or transportation, new markets, new forms of industrial organization” replace existing markets.⁷⁷ The added benefits from “lower prices, better performance, new features, catchier styling, faster service, more convenient locations, higher status, more aggressive marketing, or more attractive packaging” improves society as well as living standards and quality of life. Benefits from creative destructive in the news media industry can also include a better informed public with access to more diverse sources of information.

Some illustrative examples of creative destruction and disruptive technology include the telecommunications and manufacturing sectors. The telecommunications sector faced creative destruction when switching technology entered the market, competed with, and outperformed switchboard operators. In 1970, the telephone industry employed 421,000 switchboard operators who handled 9.8 billion long-distance calls at 64 calls a day.⁷⁸ With advances in switching technology, creative destruction reduced the number of operators to 156,000 by 2000 yet productivity increased to 106 billion calls at 1,861 calls a day.⁷⁹ Without the productivity gains,



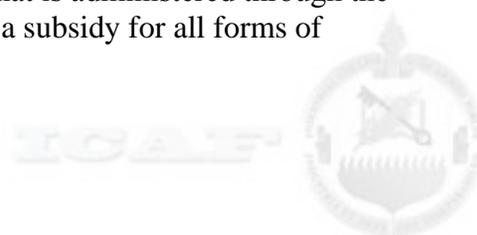
a long-distance call would cost six times as much requiring 4.5 million operators to handle today's volume of calls.⁸⁰ The manufacturing sector between 1977 and 1987 faced creative destruction when new and more productive establishments displaced old and less productive ones. The average productivity of establishments that failed to survive the 10-year period was 17 percent lower in 1977 than that of the establishments that successfully survived the same 10-year period.⁸¹ Entering establishments displaced the old ones and had much higher productivity than that of the displaced establishments.⁸² According to Shigeru Fijuta in "Creative Destruction and Aggregate Productivity Growth," this pattern demonstrates how new and more productive firms push out old and less productive ones.⁸³

This pattern of new disruptive technologies and business methods pushing out less productive businesses provides a model for what we are seeing in the news media industry. Although the market is clearly imperfect and industry must do much to transform, as we see in the historic examples, in this era of rapid change, the proper role for government is to ensure a free and open system in which transformation can flourish. Because government intervention is likely to retard innovation and delay the positive outcomes of this process of transformation it should not intervene to prop up the status quo or shape the outcome of this process of change. Neither should it try to pick winners and losers from among the competitors.

Contrary to this paper's arguments, some observers support sustaining the current model, or shaping its evolution, in response to this uncertain environment of diminished professional newsgathering organizations. Proponents suggest that while traditional media are declining, the Internet and citizen journalists have not risen to fill the void. As one advocate of government subsidies said, "The awareness of the implausibility of a commercial solution was made more daunting by a growing recognition of how our news media has been unraveling in this era while we were waiting for the Internet and entrepreneurs to solve our problems."⁸⁴

Those who push for official support to media fail to address the constitutional arguments that prohibit or limit government intervention. As a result, this report rejects those proposals and favors less intervention. Starting from founding of this country, the framers of the Constitution considered government intervention in media important enough to include it in the Bill of Rights when they drafted the First Amendment guaranteeing that "Congress shall make no law ... abridging the freedom of speech or of the press." Rooted in constitutional protection, freedom of speech and expression is an individual right and freedom of the press is a collective right, designed to provide a marketplace of ideas free from the tyranny of government control. Justice Potter Stewart noted, "Those who wrote our First Amendment put their faith in the proposition that a free press is indispensable to a free society. They believed that 'fairness' was far too fragile to be left for a government bureaucracy to accomplish."⁸⁵ Ensuring this freedom is in the public interest; however, government should tread lightly when considering intrusion into a freedom specifically guaranteed by the Constitution.

Additionally, the Supreme Court has held, "in the realm of private speech or expression, government regulation may not favor one speaker over another."⁸⁶ The Court has also held that "Both tax exemptions and tax deductibility are a form of subsidy that is administered through the tax system."⁸⁷ This means the government would have to provide a subsidy for all forms of



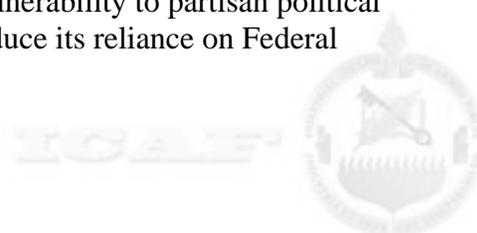
news media and could not pick and choose. It could not, in effect, pick preferred classes of speakers for subsidies, just as it may not single out disfavored classes for penalties.⁸⁸

Proponents of subsidy argue that journalism is a public good and, because public goods are generally undersupplied by private markets, the government must subsidize news organizations. Communications professor Robert McChesney argues, “It is something society requires, and people want, but the market cannot generate in sufficient quantity or quality. It requires government leadership to exist. There may be an important role for the private sector, but with public goods the government plays quarterback or the game never starts.”⁸⁹

While the counterargument attempts to frame the debate from a public goods perspective, this paper concludes that while an informed public is in the national interest and contributes positively to the health of our democracy, the manner in which that public gets information is not an issue for the government. Despite radical changes facing the news media, citizens will remain active in pursuing their individual and collective interests and will demand quality news and information. If the market falls short, citizens will clamor for better and more diverse sources of information. This demand will eventually be met by the market. In the interest of facilitating open and informed debate, the U.S. Government should encourage a plurality of news sources and competition. It should strive to reduce interference and should seek to eliminate regulations that restrict media’s ability to innovate. This report endorses the proposition that government focus its efforts on creating an enabling environment in which new media and old, traditional and digital, can flourish.

Proposed Actions for Government:

- The Federal Communications Commission should ease rules on cross ownership that generally bar newspapers from owning broadcast stations in the same market. Removing this restriction will allow newsrooms to consolidate, providing savings and synergies across platforms.
- Because current business models are founded on special postal rates for media, these should be left in place. The special rate for media material supports the distribution of news and information in addition to books and educational materials and removing this form of general subsidy would harm the news media industry at a moment when it is most vulnerable.
- The Federal and state governments should support programs that fund education in journalism as a profession. States should sponsor programs in news literacy at the elementary and secondary school levels.
- Current laws allow newsgathering organizations to operate as non-profit institutions, which makes donations to them tax deductible. This should continue because it encourages additional voices and greater variety of news sources.
- Although public broadcasting is only minimally funded by the Federal government (approximately 15 percent),⁹⁰ it provides one area where the national government can contribute on the margins to the quality of journalism. Although the Corporation for Public Broadcasting, the Public Broadcasting System and National Public Radio are increasingly under attack from political foes, they fill an important niche in the media eco-system and can contribute positively to overall media quality. To lessen its vulnerability to partisan political attacks, this paper recommends public broadcasting seek to reduce its reliance on Federal funding.



- The administration should continue plans to invest in broadband access for underserved communities. Access to broadband will help close the digital divide and give more citizens access to digital material.

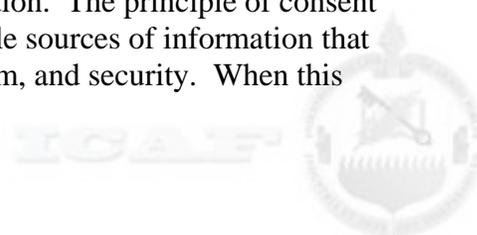
Policies Government Should Avoid:

- Although some argue for tax credits for journalists' salaries,⁹¹ this likely would be unsustainable on constitutional grounds and would invite the government into news operations at a level that most free press advocates would consider intrusive.
- Some propose citizen news vouchers that can be contributed to non-profit media.⁹² Although an interesting proposal that does address some of the constitutional issues associated with other subsidy schemes, vouchers would require a massive infusion of government funding in an era of diminishing budgets.
- Some argue that non-profit news organizations should be exempt from the rules of the tax code that prevents them from advocating on behalf of candidates. Although there is room for debate, this prohibition protects against lobbyist establishing themselves as non-profits, thus flouting restrictions on lobbying. There is no reason to lift this prohibition.
- The BBC system of directly funding public broadcasting from household television and radio licenses offers an alternative model for financing. The BBC model has the advantages of providing funding, while removing direct government involvement in broadcast operations, thus diminishing the temptation for partisan meddling in editorial decisions. Although the system works well in the British context and the BBC is very popular in the United Kingdom, given budget realities and current attacks in Congress against the very institutions of American public broadcasting, the British model would not prosper in the current highly partisan U.S. political culture and does not offer a truly viable option for funding public broadcasting.

CONCLUSION

Disruptive technologies, by their very nature, disturb the status quo. Journalism has always adapted to new technologies, thereby improving its content and distribution capabilities and leading to a more informed public. Journalism has grown and flourished as a direct result of challenges from new technologies and techniques. The resulting synthesis of the established order and the new challenges enrich, not impoverish, journalism. The American public and the media industry are witnessing the creation of a new "eco-system" in which new forms of journalism compete for space and attention. This paper recommends patience as market actors adjust to the new competitive environment. Current trends are working in favor of the average citizen. Justice Learned Hand wrote that the First Amendment "presupposes that right conclusions are more likely to be gathered out of a multitude of tongues, than through any kind of authoritative selection. To many this is, and will always be, folly; but we have staked upon it our all."⁹³

American democracy and the informed public that make it work are strong enough to survive temporary disruptions that will accompany this radical transformation. The principle of consent of the governed is best served when citizens have access to multiple sources of information that are necessary to make the decisions affecting their choices, freedom, and security. When this



access is either denied or unavailable, citizens will seek this information on their own because from information comes knowledge and from knowledge comes power and security. When asked to address whether the loss of newspapers would mean citizens would be less informed veteran foreign affairs correspondent Pat Towell replied there is “always a requirement for sound information regardless of the medium. Engaged people will still seek to be engaged. High quality work will still makes its way to the readers” regardless of the medium.⁹⁴ The United States news media industry is still providing that high quality work and disseminating it to the citizens of the country to ensure they remain well informed and ready to provide their consent to the government.

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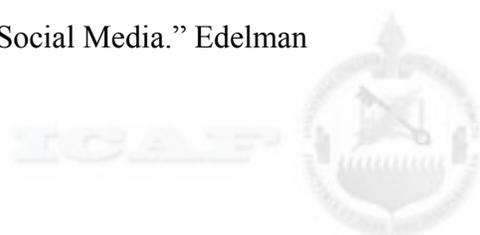
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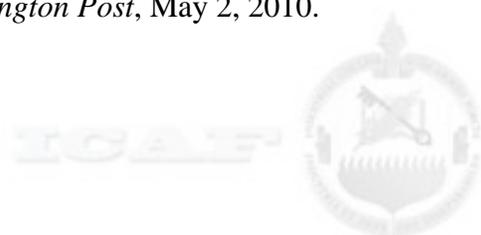
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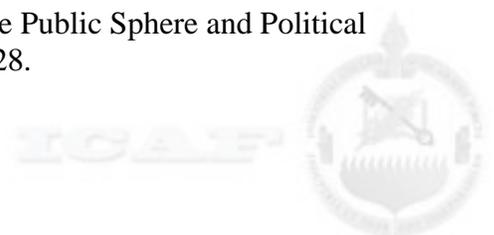
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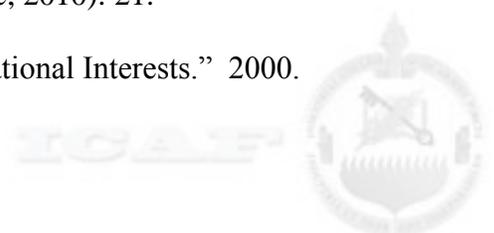
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