

Summary of Survey of Local Area Web Publishers

Autumn 2011

Overview

The Knight News Innovation Lab conducted an online survey of news-oriented web sites in the Chicago metropolitan area in Autumn 2011. The survey was designed to:

- Gain insight into the capabilities and priorities of local sites
- Identify areas where the Lab might provide assistance
- Provide a benchmark for growth in capabilities over time

Survey questions were aimed at eliciting the degree to which sites are:

- Deploying a wide range of commonplace tools for web publishing
- Utilizing newer channels such as social media and mobile
- Attuned to the importance of metrics in site management
- Open to sharing links and content with other sites
- Confident about their abilities to keep up with technology change
- Receptive to working with the Lab

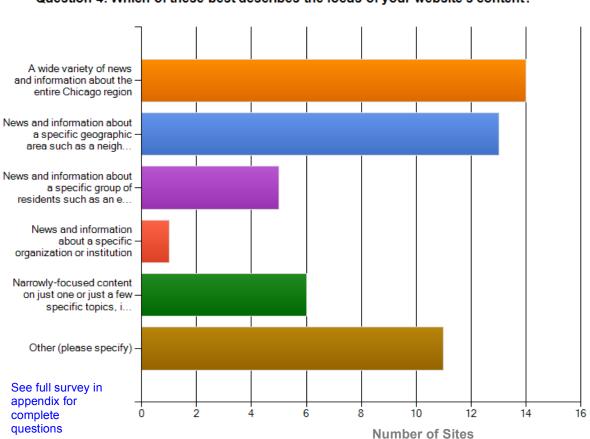
Notable findings include:

- Most publishers use a broad array of on-site tools to engage audiences, ranging from comment boards to video. More than 75% indicated they want to do more with multimedia in the near future. Most also said they have difficulty in changing the design of their sites and many find it difficult to implement new sections or pages.
- Use of Facebook and Twitter is commonplace and most sites believe use of social media is an important priority. Nearly a quarter of the respondents believe social media is important, but aren't satisfied with their own usage.
- Most sites have paid at least some attention to mobile devices, with phones viewed
 as higher priorities than tablets. A majority of sites see further mobile development
 as an important priority, but a lesser number are confident that they can make the
 improvements they need.
- Nearly half of the respondents are paying little or no attention to metrics.
 Improving their use of metrics was cited as a relatively important priority, but not an area where they indicated strong confidence in their abilities.
- While primarily focused on building their own site traffic and their own content, most sites understand the importance of interchange of traffic and content with other sites.
- Sentiment was mixed on respondents' self-evaluation on their abilities to keep up
 with changes in technology and user needs. Relatively few sites expressed low
 confidence in their abilities to keep up, but fewer than 40% of sites expressed strong
 confidence.

Methodology and Participation

The survey was conducted via Survey Monkey from September 28 through October 24. Invitations to participate were e-mailed to 113 sites that had been previously identified by Northwestern faculty as providers of updated news and information. The initial invitation from the Lab was followed up with several subsequent e-mail reminders and phone calls.

Responses were received from 50 sites, including leading online-only publishers, sites affiliated with print publications, sites affiliated with community groups, and small grassroots start-ups. (See graph for Q4.) Slightly over a quarter of respondents said they covered "a wide variety of news and information about the entire region," while the rest covered specific neighborhoods, topics, ethnic groups, and other narrower interests.



Question 4: Which of these best describes the focus of your website's content?

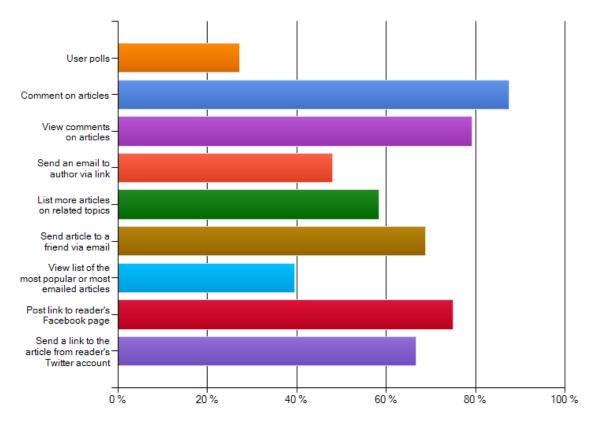
Two-thirds of the sites indicated that they publish new content at least once a day, with more than half of all respondents indicating they publish new content multiple times a day. Only 12% indicated that they publish updates fewer than several times a week. 44% indicated they have been publishing for more than five years, with only 18% indicating they have been publishing less than three years. Based on an analysis of the types of sites responding, we are confident that the survey is a good reflection of the state of web publishing among small and midsize publishers in the Chicago metropolitan area. (See Appendix A for a complete list of the 50 sites that participated in the survey, and Appendix B for a copy of the complete survey.)

Site Features

A majority of sites include a range of content-related features that enable readers to interact with site-produced content. More than 40 of the 50 sites enabled readers to comment on articles and more than two-thirds enabled readers to view comments and provide links to articles to other people via e-mail, Facebook, and Twitter.

The group is somewhat less robust in providing on-site features for content discovery. Fewer than 60% provide lists of more articles on related topics and fewer than 40% offer a "most emailed" or "most popular" list.

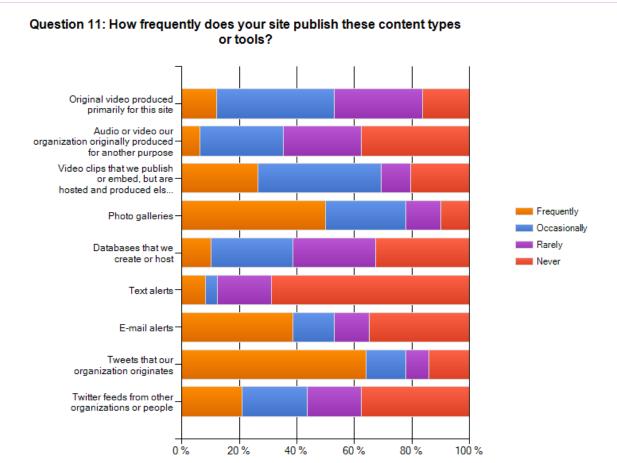
Question 9: Which of the following features do you provide readers through buttons, badges, links, etc. Check all that apply.



Responses indicated usage of a diverse set of content types and off-site delivery channels. Multimedia elements are commonplace—with an overwhelming number of sites using photo galleries and video at least occasionally. Just over half of respondents indicated that they at least occasionally feature original video produced primarily for the site and a large number of sites also include video hosted and produced elsewhere.

New Channels: Social and Mobile

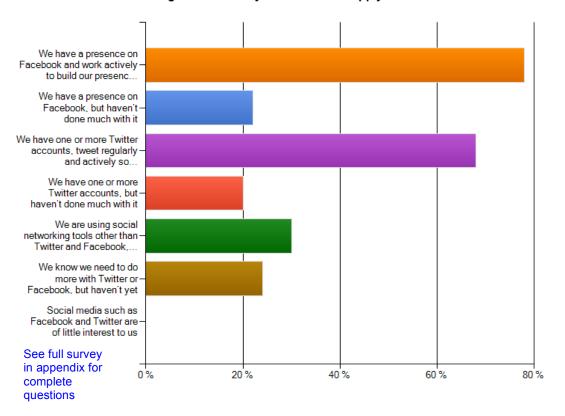
While text alerts aren't utilized much and e-mail alerts are only used frequently by 40% of respondents, 64% said they frequently tweet. (See graph for Q11.) However, a majority of their sites rarely or never include Twitter feeds from other organizations or people.



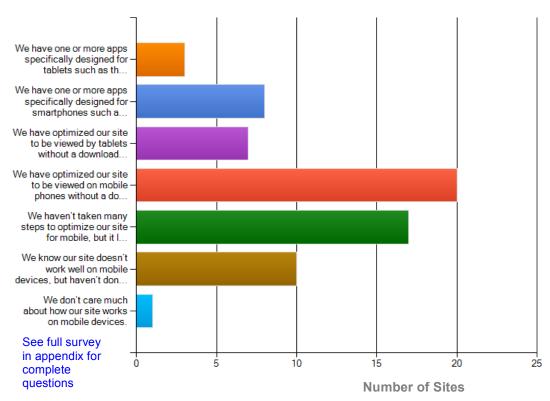
Twitter and Facebook have captured the attention of all of the sites—with not a single site among the 50 respondents indicating "little interest" in social media. Thirty percent indicated they are using social networking tools other than Twitter or Facebook. (See graph for Q13.) Slightly more than one-fifth of the sites indicated that they have a presence in social media, but "haven't done much with it." Thirty percent indicated they are using social networking tools other than Twitter or Facebook.

Only one site indicated "it didn't care much about" how its site works on mobile devices, while another 20% said they know their sites don't work well on mobile "but haven't done much to improve it." (See graph for Q12.) Three sites indicated they had an app for a tablet such as an iPad and eight said they had at least one app for smart phones. Forty percent indicated they had optimized their sites to be viewable on phones without a downloadable app.

Question 13: Which of the following statements about social media describes your organization today? Check all that apply



Question 12: Which of the following describes your organization today? Check all that apply

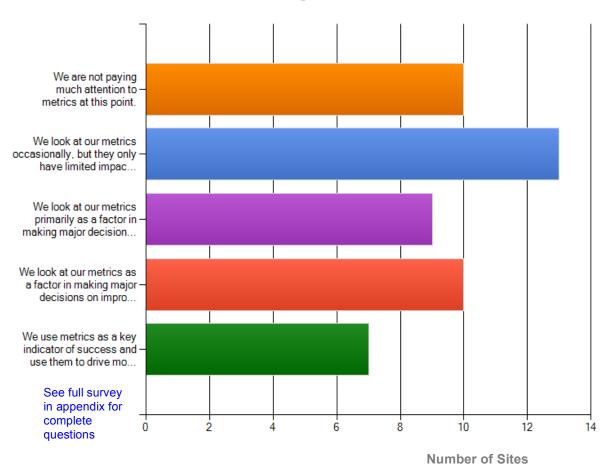


Use of Metrics

Although many sites indicated an awareness of the need to better understand how to use metrics for decision-making, only a minority does so now. (See graph for Q17.)

Only 7 of the 49 sites responding to the question said they use metrics as "a key indicator of success and use them to drive most of our decision-making" and an additional 10 said they are a factor in making both major decisions and routine decisions on a routine basis such as which articles to feature.

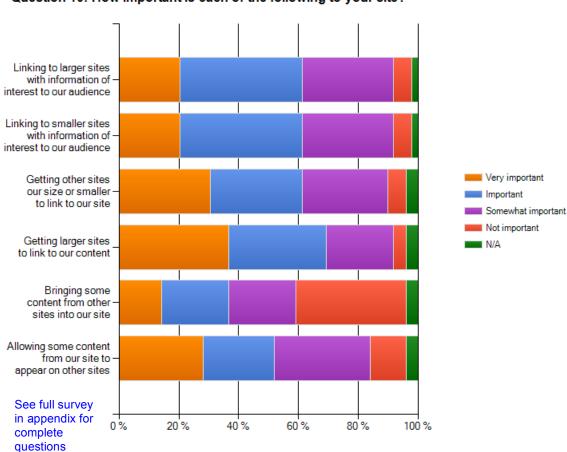
Question 17: Which of the following best describes how metrics are used by your site for decision-making on content?



Participation in the publishing ecosystem

Almost all sites see value in linking with other sites. (See graph for Q10.) Not surprisingly, links bringing inbound traffic from other sites to their own sites were valued highly (particularly from larger sites)—but 60% of sites think it is "important" or "very important" to provide links other sites (with apparently no preference whether the outbound links are to larger sites or smaller ones).

There was less enthusiasm indicated for incorporating content from other sites, with only 14% rating it "important" and 37% rating it "not important." Sites were more enthusiastic about allowing their content to appear on other sites, with 84% rating it at least "somewhat important."

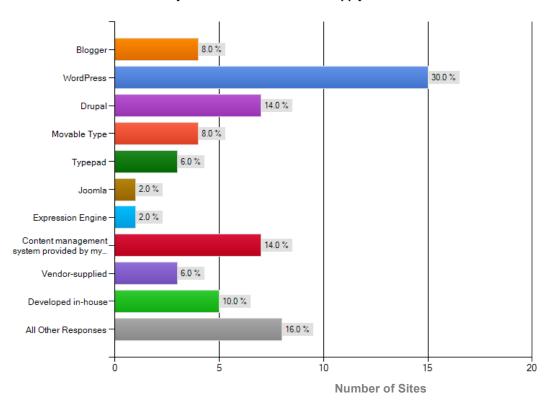


Question 10: How important is each of the following to your site?

Technology Capabilities

About 60% of respondents indicated that they have the ability to develop their own software, either through staff or external developers.

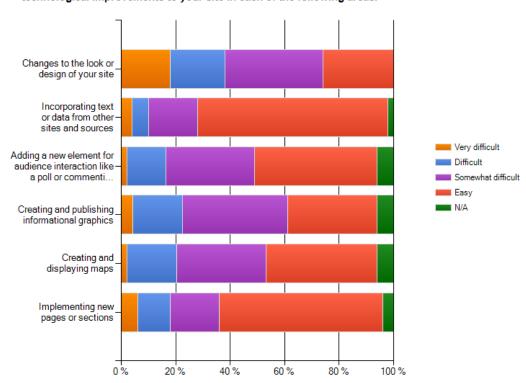
No single publishing platform predominates among the group—although 15 sites named WordPress. (See graph for Q21.) Next most popular was Drupal and a CMS "provided by my web hosting firm," each choice named by seven sites.



Question 21: Which of these publishing platforms or content management systems does your site use? Check all that apply

Tech challenges come in a variety of sizes for the respondents. Of six typical tasks listed, only two—incorporating content from other sources and implementing new pages or sections—was cited as "easy" by a majority of respondents. Even those tasks were found difficult by a notable minority of sites. (See graph for Q18.)

"Changes to the look or design" of a site were viewed as the most challenging, and 30 of the 50 sites found "creating and publishing informational graphics" to be at least somewhat challenging.



Question 18: Please indicate how easy or difficult it is to make technological improvements to your site in each of the following areas.

Priorities and Capabilities for Future Development

A free-form question asked respondents to name "the single most important area where technology assistance would have the greatest value" and the 41 meaningful responses covered a wide range of topics. Several mentioned assistance with their particular content management platforms and several others mentioned publishing fundamentals such as usage of metrics, SEO and ad sales. The most easily identifiable area was mobile, which was mentioned in eight of the responses.

Asked in a structured question to evaluate possible improvements in their sites during the next year, most respondents rated search engine optimization, better use of metrics, adding multimedia, and using social media as their highest priorities. A majority of sites continue to ascribe importance to improving the management of user comments.

Sites were notably less interested in utilizing data and tweets from external sources on their own sites. Getting users to pay for content was not a priority for most of the sites responding to the survey.

Getting in better shape for mobile access was of moderate interest, with relatively few sites saying it was unimportant, but only about a third saying it was "very important."

Q14A: Looking ahead to possible improvements to your site in the next 12 months, how would you rate the importance of each of these issues?

	Very Important	Important	Somewhat Important	Not Important
Making our content more visible to search engines like Google	68%	20%	6%	4%
Adding more multimedia elements like audio, video and photos	50%	28%	14%	8%
Efficiently managing user comments on our sites	32%	30%	24%	14%
Using Twitter or Facebook to engage audiences with our content	64%	28%	6%	2%
Efficiently managing Twitter feeds from external sources on our site	14%	18%	22%	36%
Understanding how to use metrics to make decisions	40%	36%	14%	6%
Publishing more data from external sources onto our site	6%	26%	44%	24%
Publishing more of our own databases on our site	18%	24%	30%	20%
Making our site better suited for mobile phones	36%	26%	28%	8%
Making our site better suited for tablets like iPads	30%	30%	24%	14%
Getting users to pay for access to some of our content	10%	12%	14%	46%

Additionally, respondents were asked to indicate their views of "whether your site will have access to the tools and expertise to accomplish" the indicated improvements—and responses generally tracked their importance to the site.

Given the importance that sites ascribed to understanding how to use metrics, only one-third believed they had the tools to accomplish the task. Respondents had a notable lack of confidence in their ability to make their sites better suited for tablets like iPads.

Q14B: For those improvements you rate as Very Important or Important, please indicate your view of whether your sites will have access to the tools and expertise it needs to accomplish the task.

(nur	mber of sites)		
	We can accomplish	We have some abilities to accomplish	We cannot accomplish
Making our content more visible to search engines like Google	22	21	2
Adding more multimedia elements like audio, video and photos	23	20	2
Efficiently managing user comments on our sites	20	17	5
Using Twitter or Facebook to engage audiences with our content	32	15	0
Efficiently managing Twitter feeds from external sources on our site	12	11	3
Understanding how to use metrics to make decisions	16	21	5
Publishing more data from external sources onto our site	17	15	3
Publishing more of our own databases on our site	12	15	7
Making our site better suited for mobile phones	17	15	9
Making our site better suited for tablets like iPads	10	17	12

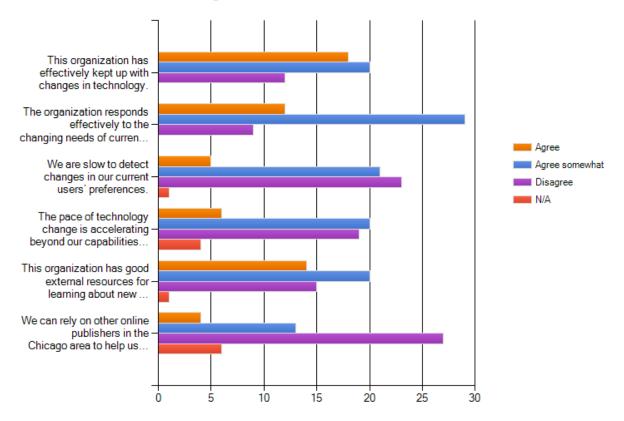
Technology Confidence

In a series of questions designed to assess sites' confidence about their ability to keep up with change, responses indicated a definite—but not overwhelming—sense of concern. "Agree somewhat" was the most popular choice on these questions. (See graph of Q15.)

Respondents generally believe they "respond effectively to the changing needs of current users," while not entirely disputing, that "the pace of technology change is accelerating beyond our capabilities to keep up in the future."

They were also only moderately concerned about having good resources for learning about new technologies—although they aren't looking to local peers for guidance. Only about a third of sites said they "can rely on other publishers in the Chicago area to help us stay abreast of new technologies."

Question 15: The following list of statements is related to the ability of an online news organization to keep up with technological change. Thinking about your site, please indicate how well each statement describes your organization.



^{*} The entire survey appears as Appendix B at the end of this report.

Appendix A

Participating Sites

Art Letter Marina City Online

Beachwood Reporter Mindful Metropolis

Bleed Cubbie Blue Newcity

Catalyst Chicago New Communities Program

Chicago Argus Northwest Herald

Chicago Art Magazine NWI.com

Chicago Classical Review OakPark.com

Chicago Foodies Pilsen Portal

Chicago Justice Project Proyecto Latina

Chicago Magazine Reflejos Bilingual Journal

Chicago News Cooperative Rogers Park in 1000 Words

Chicago Reader Skokie Net Community Information Network

Chicago Reporter Small Business Executive

Chicago Theater Beat Smart Communities

Chicagoist Streetwise

Evanston Now Suburban Life Publications

Expired Meter The Voice Newspapers

Extra Newspaper Time Out Chicago

Feast of Fun TribLocal

Gapers Block Uptown Update

Greater Auburn-Gresham Development

Corporation

Illinois Review

Vivelohoy

WBEZ.org

Hispanically Speaking News

We the People Media

Humboldt Park Portal
Windy Citizer

Windy Citizen

Windy City Times/Windy City Media Group

Logan Square Neighborhood Association

Knight News Innovation Lab Survey

Thank you for participating in this survey sponsored by the Knight News Innovation Lab. We are gearing up at the Lab to create programs and software to help online publishers in Chicagoland. This survey will help us better understand the needs of publishers. Your responses will be kept confidential and will only be published in the aggregate, meaning neither you nor your organization will be identifiable.

1. What is the name of your primary site or site that you oversee?
2. What is the URL of that site?
3. Does your company or organization operate any other sites providing news or information?
□ Yes
□ No If you checked Yes, please list sites
Throughout the remainder of the survey, we would like you to answer the questions in reference to your primary site or site that you oversee, as indicated in your response to Question 1.
4. Which of these best describes the focus of your website's content?
 A wide variety of news and information about the entire Chicago region News and information about a specific geographic area such as a neighborhood or suburb News and information about a specific group of residents such as an ethnic group,
nationality or occupation
 News and information about a specific organization or institution Narrowly-focused content on just one or just a few specific topics, interests or activities
□ Other (please specify)
5. How often do you or your colleagues typically publish new content on the site?
 ☐ Multiple times a day ☐ Once a day ☐ A few times a week ☐ A few times a month ☐ Less than once a month
□ Other (please specify)

6. How long has the site been op	erating?				
☐ Less than one year					
□ 1-2 years					
□ 3-5 years					
□ 6-10 years					
□ More than 10 years					
7. Which statement best describe	es the relat	ionship of you	r site to other me	dia outlets?	
We're closely related to the closely	o a small o	r mid-size med	dia operation like a	a magazine or	weekly
☐ We have a loose relati	=		r broadcasting me	dia, but we're	<u>;</u>
mostly an independent o	•		:: f: + : + -		
 We're an independent established media 	. online ope	eration with no	o significant ties to	other more-	
Other (please specify)			\neg		
8. Which statement best describe	es your site	e's ownership?			
 □ We're owned by a med we're owned by a continuous of site (or group of site of the following feature) 9. Which of the following feature of the fellowing feature 	npany or or or ites) is our	rganization wh organization's	ose primary activi or business' prima	ty isn't media ary activity	
□ User polls					
Comment on articles					
View comments on art	ticles				
 Send an email to author 					
☐ List more articles on re	•	CS			
☐ Send article to a frience					
□ View list of the most p	•		rticles		
□ Post link to reader's Fa□ Send a link to the artic			account		
10. How important is each of the			iccount		
•	_	-			
	rtant -Impo	ortant –Somew	/hat important –N	ot important -	-N/A
-Linking to larger sites with	-				
information of interest to our audience	J				
-Linking to smaller sites with					
information of interest to our audience					

10. How important is each of t	he following	to your site?	Continued.		
Very im	portant –Imp	ortant –Some	what importa	nt –Not import	ant –N/A
-Getting other sites our size					
or smaller to link to our site -Getting larger sites to link to					
our content -Bringing some content from					
other sites into our site -Allowing some content from					
our site to appear on other sites					
11. How frequently does your	site publish	these content	types or tools	?	
	requently	Occasionall	y Rare	ely Neve	er
Original video produced primarily for this site					
Audio or video our organization originally produced for another purpose					
Video clips that we publish or embed, but are hosted and produced elsewhere					
Photo galleries					
Databases that we create or host					
Text alerts					
E-mail alerts					
Tweets that our organization originates					
Twitter feeds from other organizations or people					
12. Which of the following des	cribes your o	organization to	oday? Check al	l that apply.	
 □ We have one or more apps □ We have one or more apps □ We have optimized our site □ We have optimized our site □ We haven't taken many ste □ We know our site doesn't vit. □ We don't care much about 	specifically of specifically of the viewed to be viewed to optimize the vork well on	designed for sr d by tablets w d on mobile pl ze our site for mobile device	martphones su ithout a down hones without mobile, but it s, but haven't	ich as iPhone oi loadable app. : a downloadab looks pretty go	le app. od anyway.

13. Which of the following statemed Check all that apply	ents about social media desc	ribes your organization today?
 □ We have a presence on Facebook □ We have a presence on Facebook □ We have one or more Twitter at □ We have one or more Twitter at □ We are using social networking GooglePlus, Digg or MySpace □ We know we need to do more volume □ Social media such as Facebook at 	ok, but haven't done much we ecounts, tweet regularly and ecounts, but haven't done m tools other than Twitter and with Twitter or Facebook, bu	vith it actively solicit followers uch with it I Facebook, such as Foursquare, t haven't yet
14. Looking ahead to possible imprrate the importance of each of the Important or Important, please ind tools and expertise it needs to accomplete.	se issues? For those improve icate your view of whether y	ements that you rate as Very
-Making our content more visible to search engines like		
Google		
-Adding more multimedia		
elements like audio, video		
and photos		
-Efficiently managing user		
comments on our sites		
-Using Twitter or Facebook to		
engage audiences with our		
content		
-Efficiently managing Twitter		
feeds from external sources		
on our site		
-Understanding how to use metrics to make decisions		
-Publishing more data from		
external sources onto our		
site	_	
-Publishing more of our own		
databases on our site		
-Making our site better suited		
for mobile phones		
-Making our site better suited		
for tablets like iPads		
-Getting users to pay for		
access to some of our		
content		

15. The following list of sup with technological ch			' - '	_	· · · · · · · · · · · · · · · · · · ·
describes your organizat	_	,			
		Agree	Agree somewhat	Disagree	N/A
-This organization has					
effectively kept up with					
changes in technology.					
-The organization respon	nds				
effectively to the changi	ng				
needs of current users.					
-We are slow to detect					
changes in our current u	ısers'				
preferences.					
-The pace of technology					
change is accelerating					
beyond our capabilities	to				
keep up in the future					
-This organization has go	ood				
external resources for					
learning about new					
technologies.					
-We can rely on other or					
publishers in the Chicago					
area to help us stay abre	east				
of new technologies.					
16. Please assign percen		=			
contribute to the followi	ing categori	es thinking ab	out the overall effort t	that goes into	your site.
Less	than 10% -F	Half or less tha	n 50% -More than 50%	6 -More than	75% -N/A
-Producing original					
content					
-Finding content					
we want to					
link to					
-Cultivating,					
managing and					
responding to user					
comments					
-Selling advertising					
-Raising money					
from sources					
other than advertising					
-Attracting a larger					
audience					
-Managing technology					

17. Which of the following content?	ng best describ	es how metrio	s are used by yo	our site for ded	cision-making on
 □ We are not paying mu □ We look at our metric □ We look at our metric □ We look at our metric smaller decisions on a free □ We use metrics as a kabout our site 	es occasionally, es primarily as a es as a factor in equent basis (s	but they only a factor in mal making majo uch as which	have limited im king major decis decisions on ir articles to featu	ions on improngeronger on the second	ving our site. ite and making
18. Please indicate how each of the following are	= '	it is to make	technological in	nprovements t	to your site in
	Very diff	icult Difficu	lt Somewhat	difficult Easy	N/A
-Changes to the look or design of your site		С			
-Incorporating text or da from other sites and sou		С			
-Adding a new element f audience interaction like poll or commenting area	e a	С			
-Creating and publishing informational graphics					
-Creating and displaying	maps \square				
-Implementing new page sections	es or	С			
19. What is the single movalue for your site?	ost important a	rea where ted	chnology assista	nce would hav	ve the greatest
20. Which of these state site?	ments best des	scribes your ca	pabilities for de	eveloping softv	ware for your
 □ We have one or more □ We don't have develoused in the past □ We don't have develowe can currently rely on □ We do not have the company unique for us 	opers on staff, be pers on staff, be apacity to deve	out have accessory	ernal developer for our site	s in the past, b	out have no one

21. Which of these publishing platforms or content management systems does your site use? Check all that apply
 Blogger WordPress Drupal Movable Type Typepad Joomla Expression Engine Content management system provided by my web or hosting firm Vendor-supplied Developed in-house Other (please specify)
22. In the most recent month for which data are available
How many unique visitors did your site attract?
What source do you use to measure unique visitors?
How many page views did your site generate?
What source do you use to measure page views?
23. What range best describes your site's total annual expenses in the last calendar year?
 Less than \$100,000 □ \$100,000 to \$500,000 □ More than \$500,000 □ Other (please specify)

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ness services
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ing or consulting \Box \Box \Box \Box \Box \Box \Box
of goods and services \qed
_
sactions, such as Groupon $\hfill\Box$
ure capital \square \square
r (specify below)
Optional: Whom should we contact for more information about your organi
nology needs?