

The Big Thaw

Charting a New Future for Journalism

A guide to the evolution of independent
media

Game Changer Box Set

Vol. 1 | What if?

Vol. 2 | Dissonance & Opportunity

Vol. 3 | The Future?



The Media Consortium
www.themediaconsortium.org

By Tony Deifell, Q Media Labs

List TMC members?

Acknowledgements

Special thanks to Nicole Anne Boyer of *Adaptive Edge* for partnering on this project and to Jessica Clark, Steve Moss, Erin Polgreen, Ben Rigby and Tracy Van Slyke for review and editing.

How to use this report

The results of the *Game Changer Strategy Project* are presented as a “box set” with three volumes that can be used separately.

- **Vol. 1: What if?**
This volume focuses on our research’s implications, plus project ideas for The Media Consortium (TMC), collected from people from both inside and outside the consortium. The volume can be viewed as a compendium of potential solutions, a dynamic roadmap for going forward or a tool for strategic conversations as TMC builds a shared vision for the future. This volume is for internal TMC use only.
- **Vol. 2: Dissonance & Opportunity**
This volume focuses on in-depth analysis that compares journalism’s old paradigm to its emerging realities. Vol. 2’s analysis is intended to benefit individual TMC members and other media organizations as they adapt to the changes around them.
- **Vol. 3: Future Uncertainties & Possibilities**
This volume surfaces some key uncertainties and future possibilities that are important to consider and may change the game further in coming years.

Quotes in the right-hand margin of this report are from original interviews listed in [Appendix A](#) unless otherwise noted.

While much of the analysis focuses on journalism, the implications span all types of content and forms of media.

You could use this report in the following ways:

- **Tool for internal planning and strategy**
The [New Competencies](#) chapter in Vol. 2 and its summary of [shifting roles](#) on page 29 can be used to assess your organizational structure and the human resources needed to succeed in the new competitive landscape. The [New Sources of Value](#) chapter can help you prioritize the products and services you provide and the [New Business Models](#) chapter to structure your organization financially.
- **Conversation starter among staff, board or other key stakeholders**
[Appendix B](#) includes a worksheet for facilitating group discussions. The worksheet includes four provocative statements, based on our research, to spark debate—feel free to add others. Use this process to identify the implications of the new industry dynamic on your organization’s future strategies.
- **Tool for innovation**
Use [Vol. 3, Future Possibilities](#) to help create new business models, product strategies and operating tactics. This volume only begins to identify potential game changers, but it can be used as a starting point for you to identify others.
- **Knowledge development**
Share selections of this report with staff members who want to learn more about the changing media industry. You could also conduct further research on areas of particular interest to your organization.
- **Partnership development**
Use the [Competitive Landscape](#) chapter in Vol. 2 to explore the types of partnerships you could build to succeed.
- **Funder conversations**
Share this report with funders that are interested in learning about new media’s emerging realities and may want to explore your organization’s role in the new media environment.
- **Online discussion**
Share portions of the report with your users to engage them with the industry’s shifting dynamics and solicit comments and discussion to further your strategic thinking.

This report is also available online at www.themediaconsortium.org/future

Table of Contents
The Future of Independent Journalism

Game Changer Box Set

Executive Summary..... i
 Introduction: Strategic Dissonance. ii

Box Set Vol. 1

What if?

New Strategic Intent & Actions
 Ideas..... 1-17

Box Set Vol. 2

Dissonance & Opportunity

Old Paradigm of Journalism..... 1
 New & Emerging Realities..... 6

CHAPTER 1

NEW COMPETITIVE LANDSCAPE:

How is the playing field changing? 8
 New abundances & their effects ... 10
 New scarcities & their effects ... 11
 Device proliferation, convergence &
 their effects 13
 Dawn of a demographic revolution . 14
 Next phase of globalization & its
 effects 15
 Declining institutional control &
 affiliations 17
 Mirage of The Long Tail 18

CHAPTER 2

NEW COMPETENCIES:

What new capabilities are needed to succeed? 22
 Getting serious about community .. 23
 Strategic technology 25
 Being multiplatform 25
 Tightly integrating functions 26
 Experimentation 26
 Counterintuitive ways of working . 27
 Shifting roles 29

CHAPTER 3

NEW SOURCES OF VALUE:

What needs can be met, problems solved or desires met? 31
 Progressive ideas 33
 "My ideas" 33
 Metadata 34

Now is the time for immediacy..... 34
 Solving filter failure..... 35
 From using users to a Conversation
 Economy 36
 From audiences to communities..... 37

CHAPTER 4

NEW BUSINESS MODELS:

How are media organizations structured to capture value? 40
 Emerging operation models & cost
 structures 41
 Emerging revenue models 42
 Diversification & tension..... 49
 Emerging value chain of journalism 50
 Will there be a new demand for
 quality journalism?
 Will more reliable & consistent
 measures create greater
 distribution of value?

Box Set Vol. 3

The Future? Key Uncertainties & Possibilities

What don't we know?..... 1
 How will consumers act?..... 1
 What trends will last?
 What will happen to serious news?
 Will online media broaden or narrow
 perspectives?
 Will online media help or hurt
 democracy?
 What will happen with paper?..... 5
 How will the big players affect the game? 5
 What will commercial media &
 technology companies do?
 What role will government play?
 Will philanthropy adjust its role?
 Will we decide that the American Way
 includes investing in journalism?
 Future Possibilities 12
 Mobile ubiquity
 Multisensory convergence
 Rise in alternatives economies
 Human-centered design

Radical new ways of meaning making &
filtering
Social reading
Location based mobile
Real identity & converting reputation

Conclusion 22

Appendices

- A. List of participants & process
- B. TMC members' discussion summary
- C. The Media Consortium's history & membership
- D. Guidelines for generating game changing ideas
- E. Innovations & innovators to watch
- F. Most popular versus most influential content
- G. Notes & sources