# Worlds of Journalism Study

Field Manual, 2021

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# 1 PREAMBLE

As researchers within the *Worlds of Journalisms Study*, we all would like to see that the data we use and disseminate to the academic community and beyond meet the highest methodological standards. It is vitally important to comparative research endeavors such as ours that the data obtained from the various countries are collected using standardized and therefore comparable techniques.

All Principal Investigators (PI) are therefore kindly asked to adhere to the principles detailed in this document. Following these rules will ensure the reliability of the study's data.

There may be instances in which PIs are not sure how to proceed or in which the standard procedures may not work properly. In all these cases, PIs may kindly consult with the WJS Center at LMU Munich.

# 2 POPULATION AND SAMPLING

Note: All italicized terms are defined at appropriate places in this section.

## 2.1 Population

Having a complete list of the population of *professional journalists*, of different editorial *ranks*, working in a country's *news organization* to produce *news outlets* is critical to the success of this study. Thus, the population for this study is all journalists who work for all relevant news outlets in the country. If no information is available for the number of journalists in a country, the population should be estimated (e.g., by extrapolating the national population from news media for which the number of journalists is known). Knowing the total number of journalists is important for calculating sample size (more later).

Before a sample of appropriate size can be selected from this population, an informed picture of the national *media system* is necessary, preferably in the form of a table listing:

- all of the country's *news outlets*, categorized by criteria relevant to a country such as
  - type of media (newspapers, magazines, television channels, radio programs, news websites, and news agencies),
  - *ownership* type (private, public service media, state-run, community, and non-profit media),
  - regional distribution (national, regional, local),
  - rural/urban distribution,
  - language, and so on,
- all the *news organizations* that produce each news outlet.

For many of the countries included in WJS3, such information might be known. For other countries, the relevant data need to be extracted from various sources (e.g., national media directories, official data on media, national associations of journalists and publishers, census data).

## 2.2 Definitions

Given dramatic transformations in journalism, it is vital that country teams draw upon shared conceptual definitions. These definitions are provided below and based upon the recommendations of the Definitions Working Group (DWG). Please refer to the DWG conceptual document for justification of each definition:[1]

- A *journalist* is defined as someone who regularly seeks, describes, analyzes, interprets, contextualizes, edits, produces, presents or portrays fact-based information about affairs of potential interest to the general public (news), in any text, sound and/or

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[1] https://worldsofjournalism.org/wp-content/uploads/2020/01/WJS3_Definitions_working_paper.pdf

or visual form or medium, as part of a process of providing or interpreting this information to a more generalized group of people than those previously familiar with it, and without expectation of deriving personal benefit from this information being made available. The journalist's work may or may not specialize in any particular subject matter or "beat" (e.g., politics, culture, business, crime, sports, lifestyle, and celebrity news). The journalist may be employed by one or more news outlets (full time, part time, on short or permanent contracts, or any variation of these) or may be self-employed ("freelancer"), or may combine employment with freelancing. The journalists may hold various editorial ranks within the news organization.

Journalists may be professional or peripheral.

- o A *professional journalist* is someone who meets the definition of journalist and who considers their activity, income, or time as a journalist to be their main or most important occupation because it provides financial sustainability. In order to be eligible for inclusion in the main WJS3 sample, individuals therefore have to obtain at least 50% of their overall income from working for news media, or spend at least 50% of their work hours in journalism if they work in multiple occupations.

- o A *peripheral journalist* is someone whose frequent or regular work includes providing intentionally accurate news content without expectation of deriving personal benefit from this information being made available, but who does not otherwise fully meet the definition of professional journalist. This class includes full-time and part-time workers as well as unpaid interns and others whose sense of "identity" or "belonging" leads them to consider themselves as journalists. It may include people who work exclusively in spaces at the margins of conventional news dissemination, such as microblogging platforms, messenger apps, and other media spaces that provide social networking, video sharing or news aggregation, or that experiment with new practices and models of doing news, but it should also include, for example, volunteers at more long-standing outlets, such as community radio stations. (These people are eligible to be included in the supplemental sample of WJS3.)

- *News* is defined as subject matter that consists of factual information about current affairs, analysis of or commentary upon that information, or any combination thereof. (For the methodological purposes of our study, we do not differentiate news from "opinion.")

- A *news outlet* is an original editorial product (e.g., a newspaper, a news magazine, TV channel, online news site or radio station) with an identifiable focus on providing news. (Media outlets that do not carry any editorial coverage, such as radio stations or programs that only broadcast music, should be excluded, as should aggregation sites.)

- A *news organization* (or newsroom) is a company or other grouping that provides financial resources and editorial or logistical infrastructure (such as physical space and data networks) within which one or more news outlets function. This organization may or may not also be involved in dissemination of non-news products.

- *Media* are the means for distribution of information in any form to general audiences that are physically separated from the originators.

- A *media system* is a country-level configuration of media; such a configuration would naturally include subnational levels such as states, provinces, and similar geographical fragments, if these exist in the country.

- *Media ownership type* could fall into the following categories:

- o *Private media*: Owned by a for-profit company, whether or not its shares are publicly traded.

- o *Public service media* (PSM): Oriented to public service rather than profit, and protected from political interference in editorial processes through strong traditions or structural autonomy related to hiring, firing and allocation of funding.

- o *State-run media*: Financed either by the state (official media) or public through parliamentary allocations (state media), but, in either case, controlled by the state whether directly or through government proxies. Whether or not there is actual state intervention in news is secondary to the definition; the key is that editorial processes are not protected culturally or structurally from government intervention.

- o *Community media*: Operated often by volunteers and/or peripheral journalists to serve discrete audiences whose commonality may be delineated by geography (e.g., towns or regions) or membership (e.g., universities, ethnic groups or local organizations).

- o *Non-profit media* (or not-for-profit media): Dependent on private donations, crowd funding and/or foundation grants to cover their operational expenses, and operated without concern for debt, dividends and profit.

## *2.3 Sampling*

Broadly speaking, the *Worlds of Journalisms Study* strives to investigate samples of news outlets and journalists that *speak to* – or represent – their respective national populations.

For WJS3, there will be two different types of samples: the first is a nationally representative main sample of professional journalists (mandatory), and the second is a supplemental sample of peripheral journalists (optional) following the definitions listed above.

The strategy by which the individual national teams arrive at such samples may vary across countries. From the information on the population that has already been gathered as per Section 2.1, for the main sample, it is most useful to

- randomly (simple random sample) or systematically (systematic random sample) select news outlets in proportion to the structure of the country's media system, and

- randomly or systematically choose potential respondents, from all editorial ranks of journalists, from the news organizations that supply the content.

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**Explanation:**

A *simple random sample* is a subset of elements (e.g., news outlets or journalists) chosen from the entirety of these elements (the population). Each element of the sample is chosen randomly and entirely by chance, such that each element has the same probability of being chosen at any stage during the sampling process. For example, country teams should randomly select news outlets for inclusion in the survey in every media type category (e.g., daily newspapers, weekly newspapers, magazines etc.). These news outlets should not be purposefully chosen, or selected by mere convenience. Random selection can be done by putting names of all news outlets in a hat, mixing up the names, and then selecting up to the number of units researchers need.

A *systematic random sample* is constructed from an ordered list of elements that belong to a given population. In the most common form of systematic sampling, researchers progress through the list circularly, returning to the top once the end of the list is passed. Sampling starts by selecting an element from the list at random and then proceeding with selecting every $k^{th}$ element in the frame, where $k$ is the sampling interval, also selected randomly, for example, by asking someone to pick a random number from 1 to 10 or 1 to 20 and so on, depending what is appropriate for your study to get the requisite sample size. For example, country teams may want to select every fourth news outlet from an ordered list of media outlets in a given media type category, or they may want to choose every tenth journalist from a news organization based on an alphabetically ordered staff list. To reiterate, both the starting point and the sampling interval must be selected randomly.

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For this study, journalists are categorized into three ranks: low, medium, and high. Definitions are provided in Section 3.2.

In sum, the final sample should roughly mirror the population with respect to their basic sociodemographic profiles.

In order to avoid oversampling of journalists from smaller news organizations, PIs should apply a differential to the number of journalists selected from within each news organization. Three journalists (or less if there are fewer journalists) should be chosen from smaller organizations, and five from larger news organizations. What constitutes "large" and "small" depends on the national context, so each country team will have to decide on this matter.

The selection of the supplemental sample of peripheral journalists (optional) is left to the national team leaders keeping in mind that the overall goal is to systematically compare this group to the main sample in order to better understand the role and importance of peripheral actors in and for journalism. One approach to creating samples of peripheral journalists would be to proceed in two steps:

- First, each team would develop a matrix of peripheral roles in established journalistic organizations and recent start-ups and categorize them with respect to selected criteria such as nature of tasks, forms of employment, and forms of funding.

- Second, each team would use this matrix to develop a sampling plan with the aim to maximize variation on key criteria.

The WJS Center should be consulted whenever country teams are not sure about procedures or when they are not able to comply with the overall sampling plan.

### 2.4 Sample size

The number of professional journalists interviewed in each country's *main sample* ultimately depends on three parameters: population size, confidence level, and the amount of acceptable sampling error. A common value for the confidence level is 95 percent, so this value should be used when calculating the sample size.

In order to meet the highest standards in social survey research, national teams should ideally arrive at sample sizes with a maximum error margin of three percent. When this is not possible, a maximum error of five percent is still acceptable. The sample size can be conveniently calculated on the following website: http://www.surveysystem.com/sscalc.htm. The numbers tabulated below are intended as a rough indication (with a confidence level set to 95%):

| Population | Sampling error | | |
|---|---|---|---|
| | 5% | 4% | 3% |
| 1000 | 278 | 375 | 516 |
| 5000 | 357 | 536 | 880 |
| 10000 | 370 | 566 | 964 |
| 20000 | 377 | 583 | 1013 |
| 50000 | 381 | 593 | 1045 |

For the peripheral sample, investigators should strive for coverage on key variables, for example, legacy or established outlets versus recent start up outlets, key tasks of peripheral journalists, geographic distribution, etc. The sample size for peripheral journalists does not need to be calculated using the above parameters; at the same time, the WJS Center suggests a size of about 25% of the main sample but not fewer than $N = 30$.

# 3 QUESTIONNAIRE

## 3.1 General notes

The *Worlds of Journalism Study* requires the implementation of the common core questionnaire fully, faithfully and in its entirety.

The master questionnaire is drafted in English. PIs are responsible for the translation of the questionnaire into the relevant local language. Accuracy and equivalence of translations should be secured by systematic procedures, such as translation-backtranslation or by involving a multilingual team of researchers. The WJS Center highly encourages national teams from the same language regions to pool their resources and coordinate the translation effort.

As a general rule, functionally equivalent translation has priority over literal translation. In many cases, literal translations might evoke connotations peculiar to a specific language. National teams should therefore use a questionnaire wording that best reflects the contents of the original questions, that follows language-specific conventions, and that reflects journalists' own vernacular.

In principle, every mandatory question in the master questionnaire must be asked in every survey. In addition, researchers may or may not make use of optional questions and statements (marked in blue in the questionnaire). In exceptional cases, where PIs feel a question is irrelevant or inappropriate for their countries, they may seek the consent of the WJS Center ahead of time.

National teams are free to add questions to the questionnaire. Any additional questions, however, should not impact on the content of and answers to the mandatory questions. The variables corresponding to these additional questions should be eliminated from the data set prior to submission to the WJS Center. Groups of countries that wish to coordinate additional questions relevant to their contexts may consult with the WJS Center about data quality assurance procedures.

For better orientation please print out the questionnaire in color. Questions printed in black ink are mandatory, while questions and statements highlighted in blue are optional. Parts highlighted in green are instructions for interviewers and questionnaire programmers and should therefore not appear in the questionnaire or be read out during the interview.

Technical questions (T1-T9) should be answered by the researcher.

## 3.2 Explanations concerning individual questions

In the following, the Field Manual provides specific instructions for selected questions. These instructions may be relevant for either questionnaire translation, the construction of answer categories, or the interview itself.

| | |
|---|---|
| job_ttle | This is an open-ended question. However, we strongly recommend creating a list of the most common categories in your country, present them in the interview as answer options, and code remaining answers into "other." |
| work_exp | Only full years are allowed. Any fraction should be rounded up. |
| safe1 | S "Other, please specify": Respondents may only name other forms of harassment, but they should not be asked to rate them. |
| | I "Sexual assault or sexual harassment": This statement can be problematic in some cultures. Please contact the WJS Center for help. |
| beat2 | This is an open-ended question. However, research teams are free to create the most common categories in their country, present them in the interview as answer options, and code remaining answers into "other." |

| mbackg | Respondents should choose only one category. |
| --- | --- |
| cult_grp | Question wording depends on predominant cultural divisions in the country, such as ethnicity, race, tribe, migrant and language communities. National teams should therefore replace [cultural community] with the appropriate wording. Country teams may want to create most common categories, present them in the interview as answer options, and code remaining answers into "other." |
| religion | National teams may create lists of dominant religions and may keep an option for "other." Alternatively, the question can be open-ended and teams can code answers after the survey. |
| income | National teams need to construct ten income brackets on the following procedure: First, research teams should consult the national statistical service (e.g., Brazil: IBOPE; USA: United States Census Bureau) for average salaries of full-time workers (or full-time equivalent) in the category to which journalists belong. Second, to obtain the range for each salary bracket, the average salary should be divided by four and then rounded. Third, the brackets should be constructed starting from zero upwards. Categories 7, 8 and 9 should use an amount that is double the amount you got after the division by four. Category 10 should be open-ended. |
| | Example: A research team calculates a monthly average salary of about 2080 Euro. Divided by four, the range of the lower income brackets should be 500 (520 rounded to 500). The ten categories in this example would look as follows: (1) 0–500; (2) 501–1000; (3) 1001–1500; (4) 1501–2000; (5) 2001–2500; (6) 2501–3000; (7) 3001–4000; (8) 4001–5000; (9) 5001–6000; (10) more than 6000. |
| T1-T9 | All technical questions need to be filled by the researcher or interviewer. These questions should not be posed to respondents. |
| T6 | We might run into confidentiality issues if the location is a rather small municipality. Please ask the WJS Center for help. |
| T5 | This variable should be filled based on respondents' reported job titles or position (question job_ttle in the interview). Each respondent should be classified according to rank in three broad categories: |

1    *No management role* (lower rank): These are typically "rank-and-file" journalists from the lowest level of the editorial hierarchy who have no or very limited operational and strategic authority. These journalists primarily gather, edit and present news content, and they usually have no or very little editorial responsibility. Examples are reporters, news writers, and freelancers.

2    *Middle management role* (middle rank): These are journalists with operational authority to make day-to-day decisions about news priorities, emphasis, and assignments. They are on the middle level of the editorial hierarchy and are typically responsible for smaller divisions within the newsroom, such as a department, a beat, a desk, or a bureau. Examples are desk heads, department heads, and senior editors.

3    *Top management role* (higher rank): These are journalists with strategic authority to make long-term decisions about the news organization including hiring decisions, editorial policy, and allocation of resources. Their authority may extend across the entire newsroom or across large divisions within the newsroom. Examples are

editors-in-chief, program directors, their deputies, and such.

## 4 THE INTERVIEW

### 4.1 General notes

The *Worlds of Journalisms Study* allows the use of multiple modes of data collection – across and within countries. Preference is given to personal (face-to-face), video-call and telephone interviewing. Online and e-mail interviewing as well as "paper-pencil" surveys (in which questionnaires are distributed to journalists and collected later) are acceptable only if the former two methods are not feasible or too costly.

In countries where multiple interview modes are used, an additional variable should account for the interview mode in order to allow for detecting mode effects.

The period of data collection is January 1st, 2021 to December 31st, 2023.

### 4.1 Establishing contact

Interviewers must establish informed consent by telling the respondent the following five key items that are key to scientific transparency and data protection (see introductory script below): (a) the full name of the interviewer; (b) the institution on behalf of which the interviewer is approaching the respondent; (c) the purpose of the study; (d) the approximate length of time the interview or survey will take, and (e) the fact that participation is voluntary and confidential.

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**Introductory script**

Good morning (*afternoon, evening.*)

My name is [full name], and I am working for [institution]. We are conducting a survey in order to better understand the state of journalism and the news media around the world.

The interview is part of a study conducted in more than 110 countries worldwide. The project is supported by UNESCO, the International Federation of Journalists, Reporters Without Borders, and other relevant organizations in the field.

The interview will take about 30 to 40 minutes [or more, depending on the number of questions to be asked]. I realize your time is valuable, and I will try to get through the questions as quickly as possible. Your participation is completely voluntary, and you do not have to answer any of the questions you do not want to answer.

Let me assure you that the information you provide will be kept in strictest confidence. No one except authorized project staff will see your answers. Your information will be combined with answers we get from thousands of other journalists throughout the world.

Let me begin, please, by getting some information about your present job.

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PIs are free to use the above introductory script, amend it, or use their own scripts.

If respondents hesitate to participate, interviewers may convince them to do so by referring to one of the following: (a) that they are not selling anything; (b) that they "really appreciate" the respondent's help; and (c) that the answers of the journalists really matter.

### 4.2 Most frequently asked questions and answers (face-to-face, video-call and telephone interview mode)

The following lists a few questions commonly asked by respondents, along with suggestions as to answer these questions.

> *Question: Why don't you ask someone else?*
> Answer: Because that would be faulty research. We have been very careful in devising a sampling strategy that allows comparing journalists from very diverse media

systems. Your participation is therefore vitally important to ensuring valid and reliable information that can be compared across the nations.

*Question: How do I know that you are really from … <institution>?*
Resolution: If the respondent expresses a strong doubt about who the interviewer really is, interviewers can give this person an institutional phone number.

*Question: How long will this take?*
Resolution: Interviewers should give an honest estimate of the length (30 to 40 minutes – or more, depending on the number of questions) and tell the respondent they will go as fast as possible, or offer to call back at a more convenient time.

## 4.3 Non-response

In general, refusals should be kept to an absolute minimum.

All refusals must be documented in the methodological report sent to the Central Coordinator.

In face-to-face, video-call and telephone interview modes, all refusal responses should be probed once:

Generally: *Everything you say is completely confidential and it is important that we get your opinions.*

For demographics: *I want to reassure you this information is all confidential. We are just making sure we are talking to a wide range of individuals.*

On income: *I want to reassure you we are not looking for an exact income, just a range... or These data are important for the surveys. We need to know from what social environment we got the answers.*

In online and e-mail interview modes, journalists who have not responded to the survey should be sent at least two reminders. If possible, follow-up telephone calls should be made in order to convince respondents to participate in the Study.

Preventing termination of interviewing in face-to-face, video-call and telephone modes:

*Situation: In the middle of the survey, the respondent asks, "Are we almost done?"*
Resolution: Interviewers should convey their appreciation and let them know you will move as quickly as possible to complete the survey.

*Question: I don't have time to finish the survey.*
Answer: I realize your time is valuable, and I'll try to get through the rest of the questions as quickly as possible. Unfortunately, your opinions will not be counted unless we complete the entire survey.

## 4.4 General standards for interviewers (face-to-face, video-call and telephone interview mode)

- Make yourself familiar with the questionnaire before you start working.

- If possible, make sure that you are in quiet surroundings and will not be disturbed.

- Follow the instructions about procedures contained in the questionnaire.

- Do not hand the questionnaire to the respondent unless there are specific instructions to you to do so.

- Speak briskly but clearly. Be sure that you will be understood the first time. Read every question slowly so that the respondent can comprehend its meaning.

- Read every question exactly as it is written, even if you think it could be worded better.

- Do not explain and comment on questions in the questionnaire. If the respondent does not understand a question, repeat it another time.

- Ask all questions in the exact order in which they are presented.

- Don't leave out any questions that the respondent is supposed to answer.

- Do not suggest answers to the respondent unless they are explicitly specified in the questionnaire.

- Read aloud all alternative answers if the respondent is supposed to choose one of the predetermined alternatives.

- Write down exactly what the respondent says in answer to a given question if he/she has been given an "open ended question". If the respondent is going too fast, a good technique to slow them down is to repeat what they have said so they must wait for you to catch up with them.

## 5    DOCUMENTATION AND DATA

The WJS Center will provide an SPSS template for the main sample of *professional journalists* to all PIs. PIs should not make changes to variables and variable descriptions in the template as this will complicate the merging of data files.

After the completion of the survey, PIs should send a cleaned and complete data set – based on the template – to the WJS Center (via email to Corinna Lauerer at lauerer@ifkw.lmu.de) as soon as feasible. This email should also contain information about (1) the (estimated) size of the population of journalists and (2) the (estimated) average working hours across all professions. This information is needed to calculate the minimal required sample size (see 2.4) and coherence with sample definitions (see 2.2).

Respondents' answers to text-based open-ended questions (questions job_ttle; beat2; cult_grp; religio) as well as in "Other, please specify" fields (questions empl; empl_c2; incm_o; safe1; safe2; platf2; mbackg; format) should be translated into English.

Provided the sample size meets WJS standards, the WJS Center starts cross-checking datasets. National teams will be asked to complete a brief online survey to document their methodological procedures. The following information needs to be documented:
- (Estimated) size of journalists' population (see 2.1)
- Sampling strategy (see 2.3)
- Data collection period
- Method of data collection (see 4.1)
- Response rate (see 4.3)
- Report of potential problems regarding sampling and field work
- Report of deviances from rules stipulated in the field manual, if any

Response rates should be calculated to conventional standards – that is, simply by dividing the number of persons who provided valid and useable responses by the number of journalists approached for the interview. Every journalist who was approached but needed to be replaced by another journalist (because of invalid contacts, refusal or any other reason) will count as non-response.

Shortly after the end of the data collection period, a consolidated cross-national data set will be made available to those PIs whose data sets were cleared by the WJS Center.

More specific instructions regarding data ownership, data management, data protection, data use and sharing, data proliferation, as well as dissemination and publication policies are detailed in the WJS Data Sharing Protocol.