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AUTHOR Rush, Ramona R.; And Others
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ABSTRACT

A sample of 558 communication specialists and nonspecialists was drawn for this study of the future role of mass media in Florida. The Delphi technique was used in four rounds of mail questionnaires, though response rates dropped from 29% of the total sample in round one to 8% in round four. Social, legal, and economic events affecting the future of the mass media are discussed in this report; technical aspects of the study will be reported in a later document. Twenty-eight future events are discussed on the basis of assigned probabilities of .5 or better in round three. Fourteen events were classified as social, dealing primarily with the public's trust in access to television and newspapers. Seven were classified as legal, concerned mainly with freedom of the press. Seven were economic, dictated by rising production costs and by competition within and between the various mass media. (AA)

THE FUTURE OF THE MASS MEDIA: SOCIAL, LEGAL, AND ECONOMIC ASPECTS OF NEWSPAPERS AND TELEVISION IN FLORIDA

Ramona R. Rush, K.E. Kent, and Beverly Barnum*

Communication Research Center
College of Journalism and Communications
University of Florida
Gainesville, Fl 32611

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*Director, Associate Director, and Graduate Assistant, respectively, in the Communication Research Center. Though the names are listed in order of title, all three authors contributed equally to this work; if possible, they would have been listed simultaneously.

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The only certainty for the future is that it will be different from the present. Change is inevitable and universal. In no field is this more obvious than in mass communication, where new technology combines in a matrix of social, legal, and economic developments to presage vast shifts in patterns of thought and practice before the end of this century.

Looming large on the horizon of change for mass communication are questions of social impact. Considerations of mass media trust, accurate and responsible news reporting, and access to communication channels will be even more sensitive in the future.

Political and legal decisions are constantly being made which will affect press freedom as we know it today, and the future only portends more legal challenges and crises. Cases such as Times vs. Sullivan and Miami Herald vs. Tornillo, the right of privacy concept to protect citizens, and the "equal time" ruling for television will interplay with other legal factors in the future.

Economic and competition events will impact the media of tomorrow in yet unknown ways. The relationship of the non-print media to print media is a major consideration. Production costs, possible consolidation within and across various media industries, and audience habits and expectations are other important economic aspects of the future.

Too often those concerned with the mass media (producers, consumers, educators) get caught in a juggling act, trying to

draw on lessons learned from yesterday while coping with the present and planning for the future. Yet approaches are becoming available to cope with the dynamics of change.

Those who want to get some grasp of the past, present, and future of the mass media would be well-advised to read Don Pember's Mass Media in America (13), Alvin Toffler's Future Shock (16), and Ben Bagdikian's The Information Machines (1).

The authors, in their own ways, speak to what the media are today, what they most likely will be in the future, and what they could or should be.

Pember notes that of all the tasks "masscomm" performs, none is pursued more vigorously than its economic one. "The entire nature of the media's service to the community revolves around economics. And the economic task is the one the media do best, most of the time (13, p. 34)." He discusses media barons, business skills and values, concentration, monopolization, conglomerization, corporatism (13, pp. 315-6) -- the stuff that big business is made of.

In describing communication's technological future of tomorrow, Pember points out that much of the technology exists today, but its application has been impeded by such factors as the enormous investment in existing systems, intolerance of interruption in service, and audience habits. Pember calls for comprehensive planning and policy formulation for the communication system of the future (13, pp. 360-6).

Toffler discusses the rapidity with which our images of reality are changing and how the machinery of image-transmission is being speeded up: "No man's model of reality is a purely personal product.

While some of his images are based on firsthand observation, an increasing proportion of them today are based on messages beamed to us by the mass media and people around us . . . (16, pp. 152-81, p. 156)." The bombardment of the senses and the glut of information overloading a person's information-processing mechanism may produce several common forms of individual maladaptation -- future shock (16, pp. 343-67).

Believing that values are heavily impacted by technology, Toffler proposes the development of a new profession of "value impact forecasters" -- men and women trained to use the most advanced behavioral techniques to appraise the value implications of proposed technology (p. 439). He also points to forecasting tools such as the Delphi method and the Cross Impact Matrix Analysis and to work of the Institute of the Future which, among other things, was investigating the probable social and cultural effects of advanced communications technology at the time Future Shock was written (16, pp. 460, 462).

Bagdikian, with the aid of several research projects, focused on what the content of daily information will be, what form it will be delivered in, and how it will be distributed throughout the population. He discussed the technologies most likely to change the way the next generation receives its news, and speculated on what new technical systems will do to the content and form of news in the United States during the remainder of this century (1, pp. x-xii). The forecasting technique used in the book was based on the general idea of Delphi.

These three authors agree on several points. They know it is difficult to predict the future because of both the unpredictability of human behavior and the inadequacies of current forecasting tools. But they want their readers to give some thought as to where the communication system is going and how it is going to get there so that decisions made in an ad hoc manner will be avoided and so that the system will not be the victim of habit or narrow and restrictive policy.

The mass media of the future have been a focus for many writers in addition to those mentioned above (see Selected Bibliography). Worthy of special note are authors such as Lee Loevinger, who was concerned with "The Limits of Technology in Broadcasting (9)," Theodore Peterson, writing on "Magazines: Today and Tomorrow (14)," James H. Mackin, Jr. and Marvin J. Rosen, viewing the future of public relations as "Zip! -- The Future Passes! (11)," Leo Bogart, considering "The Mass Media in the Year 2000 (2)," and Wayne A. Danielson, examining the future media producers in "The Next Generation of American Journalists (3)."

There is a sense of foreboding in many of these works that technology will end up "wagging the tail" of the media consumers, if not media producers. David W. Conrath and Gordon B. Thompson proposed that social values be taken into account in evaluating the impact of alternative communication systems on society. In the introduction to their article, "Communication Technology: A Societal Perspective," it is noted:

> Historically the communications industry has been dominated by technology. Concepts such as efficiency, size, and fidelity have been the controlling factors affecting product and system design.

> Now, however, a wide variety of devices and systems can be provided to the consumer of communication services, assuming limited development of the relevant technologies. This requires that choices be made about what is worthwhile pursuing. Since these decisions will shape communication systems for years to come, inputs to the choice process ought to reflect considerations other than just short-run economics and technological feasibility. In particular, these choices ought to reflect societal needs. . .(4).

The forecasting of social futures is gaining momentum through the establishment of quasi-scientific forecasting techniques as well as specialized organizations (such as the Commission of the year 2000 under the auspices of the American Academy of Arts and Sciences, the World Society, and the Institute for the Future). Roland G. Meinert discussed four of these techniques -- extrapolation, Delphi forecasting, simulation, and scenario speculation -- for use by social work (12). The Rand Corporation has published a selected bibliography on Delphi and Long Range Forecasting (5) and the Institute for the Future has provided formal documentation in its reports (15).

The study reported on in this paper was based on a modified version (see Method section) of the Delphi technique. Therefore, a brief description of the original technique follows.

Simply described, the Delphi method is a procedure for establishing group judgment concerning the future for any subject matter where precise information is lacking. Estimates of future states are arrived at by polling experts, usually by questionnaires, in a carefully structured way so as to arrive at a consensus that is free of the usual interpersonal sources that normally bias group judgments. Several phases can be completed in making a Delphi

forecast. These might include:

(1) Expert judges are placed in an environment free of social-psychological influence from other judges.

(2) Expert judges then generate estimates about future events within a logical domain.

(3) The judging group is also required to estimate the probability of the estimated events occurring before a given date in the future.

(4) Forecasts are then collated. The information is fed back to the group and the experts are given an opportunity to revise their earlier forecasts and probabilities. The experts are also required to list the sources that prompted their forecasts.

(5) Phases two, three, and four are repeated. If respondents' estimates do not fall within the interquartile range of all conjectures, they are asked to justify their position and are given the opportunity to change their estimates.

(6) The forecaster, not the expert group, then uses the data to make a forecast embracing the span of time of the interquartile range, or if desirable, for a specific point in time within it.

The Delphi method relies on a collective judgement process based on expert opinions and intuition. The forecasts emanate from the experts and not from specific present or past empirically knowable conditions (12, p. 50; 6; 7).

Some variations in the basic procedure can include:

(1) Asking for subsidiary questions by respondents as a part of the first round to help clarify and arrive at a more reliable answer to the primary question.

(2) Attributing differential weights to the opinions of different experts.

(3) Shortening the length of time which elapses between each round by using on-line computer terminals for the questioning.

(4) Using a face-to-face panel, but eliminating interpersonal influences by asking members of the group to write their answers and then follow with a debate about their replies (8).

The study on which this paper is partially based was undertaken for several reasons, but two were dominant. The Governor of Florida, concerned about the rapid growth rate in the state, issued a directive to state agencies and universities to study problems of growth to enhance efforts to formulate effective policies for its control. The authors believed that some account of the future growth of the mass media was needed, since any policy implementation would have to rely, to a great extent, on information dissemination through such channels. The second motive was to experiment with the application of the Delphi technique, as its formulators had suggested.

METHOD

The sample of experts for this study was selected from two populations. The focal population included decision-makers in the newspaper and television industries in Florida. This group contained newspaper editors and publishers, station managers, and internal directors of media research, all experts presumably knowledgable in media production and its problems. Persons from Florida's daily and weekly newspapers, television stations, cable television companies, and producers of films for television were included in this group.

The second population is composed of a variety of persons having specific needs and interests which involve utilization of communication channels to meet professional and business objectives -- media consumers in a specialized sense. All the experts in this population are in a position to know of coming events that could have an impact on television and newspapers because of their specialized use of the media. Experts were drawn from politics, business, law, computer manufacturing, the judicial system, and journalism education.

An updated listing for each particular group and persons within the group in Florida was obtained from various documents (for instance, the 1973 Broadcasting Yearbook was consulted for a list of television stations in Florida as well as the station manager, program director, and research director for each). The sample or population studied for each group is itemized below.

Communication Specialists:

(a) Television -- from a total of 35 stations, 90 persons were selected; from cable television companies, 81 managers; and from film producing companies in Florida, 10 presidents.

(b) Newspapers -- selected were the editor and/or publisher for each Florida daily and every third weekly or semi-weekly, for a total of 128 persons.

Nonspecialists:

(c) All 40 state senators and every other state representative were chosen, for a total of 100 politicians.

(d) The seven State Supreme Court Justices were included.

(e) The heads of eight journalism schools in the state were included.

(f) A sample of 100 business leaders in the state.

(g) Eight senior partners of communication law firms located in Florida.

(h) Presidents of 26 Florida-based computer manufacturers or firms building communication hardware.

The sample of communication specialists totaled 309; there were 249 nonspecialists. The total sample then was 558 experts.

Four phases of obtaining opinions and consensus from the experts were carried out. In each phase the Delphi technique was modified somewhat.

Since problems of time, facilities, and budget ruled out face-to-face or computer console methods of data collection, mail questionnaires were used instead for each of the four phases. This marks the first variation.

A "starter" list of events concerning the future of television and newspapers was prepared through a search of the literature on the topic and from suggestions by members of two advisory committees to the Communication Research Center. This preliminary list was included in the first round of the study as a source of ideas to stimulate the experts, thinking about the topic before they compiled their own lists.

In the first round, then, experts were sent questionnaires in which they were asked to list five events from their knowledge and experience that would be most likely to have a major influence on television and newspapers in Florida over the next 25 years. This initial round was sent out in July, 1974.

A total of 161 persons, or 29 per cent, responded to the first round of the study, with a total of 390 possible events. With the aid of a panel of judges, the list of events was reduced to 143 items after duplications and extraneous topics were culled out.

These items were printed in the round two questionnaire and mailed back out in September to the respondents of the first round as well as to the remainder of the sample. It was felt that persons who had been reluctant to suggest events for the first round might reply to round two. Experts were asked to rate each of the events as to the probability of the occurence of the event in the next 25 years, or to the year 2000. This round produced completed questionnaires from 139 persons, for a 25 per cent response rate (which included 80 persons who didn't respond to round one).

For the third round, sent out in November, items which received a probability rating of 0.5 or greater on the second round were retained. This is another variation of the standard Delphi technique, in which the interquartile system of feedback is commonly used. The change was made in this study to simplify instructions and reduce fatigue or confusion for respondents. Eighty-one items remained for the third round.

During the third round, the experts were given the group mean for each item as well as their own original probability figures. They were asked to reassess their original probability score on each item after they had seen the group mean; this was the only feedback to obtain consensus provided during the entire study. In addition, round three respondents were asked to provide an estimated date of impact (when each event would be widely felt in Florida) to the year 2000. Seventy-three replies were received from round three, for a response rate of 13 per cent of the original 558 persons selected for the sample.

For the fourth and final round of the study in February, 1975, the format of the questionnaire was changed to a series of six open-ended questions. Respondents were asked their opinions on the single political, economic, and social considerations which would have the greatest influence on newspapers and television in Florida during the next 25 years. The respondents also were asked to comment on the role of newspapers in the future, given the growing popularity of non-print media, and to comment on the extent of government intervention they would like to see for the mass media. This variation was included to try to obtain more in-depth reasons for some of the probable events. Forty-seven persons replied to the final round,

for a response rate of eight per cent.

The response rate for the three similar rounds (1-3) was 161 (29%), 139 (25%), and 73 (13%), respectively. For the communication specialist group, the round three response number was 50 (TV, 28; newspapers, 22); the number of non-specialists was 23 (communication lawyers, 2: computer manufacturers, 3; businessmen 7; journalism educators, 4; legislators, 7; state justices, 0).

A major limitation of panel studies, mortality of response rate over time, certainly applied in this study. Another probable reason for the low response rates is the nature of the occupations held by the persons in the sample: they are decision makers who have many responsibilities and perhaps more time limitations than most persons. The large and diverse number of items considered by the respondents for each round undoubtedly was a major factor as well; usually only one topic is investigated in a Delphi study.

In a personal letter from Norman Dalkey, one of the developers of the Delphi technique, to Mackin it was noted that a Delphi norm for similar studies requires a minimum of 20 persons per committee to assure validity (10, p. 19). Mackin also had problems with response rates across various disciplines in his study of experts on the future of public relations.

It is not known whether the norm of a minimum of 20 persons for each group would apply given the various modifications made in this study to the original technique. In usual research methodology, however, such low response rates are considered a major limitation.

Although the study includes future events having to do with media production (equipment, personnel, coverage, and programming), the report which follows is concerned only with events related to broader societal concerns -- legal, economic, and social.

RESULTS

Respondents were in remarkably high agreement on the probabilities they assigned in round three of specific events having a significant impact before the end of the century. The probabilities assigned, though all over 0.5 as a result of the method, were not as high as might have been expected. For the twenty-eight events considered in this paper, the mean assigned probabilities ranged from 0.51 to 0.73. (See Table 1.)

Only six of the twenty-eight events were assigned a mean probability of 0.70 or higher. Three were given a mean rating of 0.55 or lower. Nineteen of the twenty-eight, then, or two-thirds, received probability ratings of from 0.56 to 0.69.

These mean probabilities were compared for the three different groups of respondents: Newspaper professionals, television professionals, and nonspecialists (the specialized media consumers). The amount by which the mean probability estimate for each of these groups differed from the combined estimate was calculated. For only thirteen of the twenty-eight events did even one of the three groups differ by an absolute value of 0.05 or more from the mean for the total sample. The largest deviation from the total mean was only 0.10, reached in two items concerning cable television.

The dates by which the three groups of round three respondents expected the events to have a significant impact were compared. Sixteen of the twenty-eight sets of dates exhibited interesting differences among the three groups, and are presented below in detailed figures. There was so little difference among the three groups for the remaining twelve sets of dates that they were not given in figures.

Social Impact

Fourteen items spoke to the social impact of newspapers and television in the future. They concerned primarily the public's trust in and access to these media.

The highest mean probability in the study, 0.73, occurred for two items. One was "There will be strenuous efforts by media to strengthen public trust." Newspaper specialists foresaw an earlier impact than did experts from the other two groups, television specialists and nonspecialists. (See Figure 1.) Over 90 per cent of the newspaper experts expected a significant impact by 1980, while the figure for the other two groups was only about 70 per cent. For 1985, however, all three groups were near or above the 90 per cent figure. Both newspaper and television nonspecialists hit the 100 per cent mark by 1990.

One of the ways in which public trust might be increased would be through a stronger feeling on the part of the public that their views are being expressed in the media. The experts in this study expected "an increase in research in Florida on ways the average citizen might communicate his feelings on various subjects to other citizens through mass communication." Mean probability assigned was 0.64. Around 90 per cent of respondents in each of the three groups expected significant developments along this line by 1990. (See Figure 2.) Once again, newspaper professionals saw such an impact occurring earlier.

There was strong agreement that "Floridians will demand that the news media be accurate in news reporting." The mean probability assigned this prediction was 0.68. The time frame within which significant impact was expected varied only slightly from group to

group, with around 80 per cent considering a significant impact likely by 1980, and around 90 per cent by 1985.

A higher level of responsibility in media coverage of pre-trial matters was foreseen by the respondents. A mean probability of 0.68 was assigned the statement, "Increased efforts will be made to avoid a conviction in the press or TV before a case can be called to trial." Disagreement in probabilities among the three groups of experts appeared for the first time in this item. Nonspecialists assigned a mean probability of significant impact before the year 2000 of only 0.63, or 0.05 less than the mean probability assigned by the total sample. Examination of the estimated dates of significant impact revealed even further disagreement among the groups. (See Figure 3.) All of the newspaper professionals expected significant developments toward more responsible pre-trial coverage by 1980, while only 60 per cent of the television experts assigned that date. This figure for the television experts jumped to over 90 per cent by 1985, however.

This item on pre-trial coverage reflects one characteristic of this type of analysis, the somewhat arbitrary grouping of predictions into categories. Obviously, pre-trial coverage is related to legal aspects of the media, a category of items considered later in this paper. However, this particular item was categorized here, under social impact of the media, since it seems to relate more to impact of the media, rather than legal bounds on the media.

Returning to the findings, the highest mean probability of the study, 0.73, was also assigned the prediction,"More and more reliance on electronic media for straight news will occur." As might be expected, television experts saw the earliest impact here, with over 90 per cent viewing a substantial change in this direction as likely by 1980. (See Figure 4.) Newspaper specialists lagged in their

estimated date of impact, also as might be expected. Nonspecialists were unanimous by 1990.

Not only was television expected to assume greater influence in straight news, it was also foreseen that commercial television would become "the single most dominant influence medium." A mean probability of 0.59 was assigned this prediction. Nonspecialists differed in their ratings, giving a mean probability of 0.08 higher than the total sample. Only slight variation was found in estimated dates of impact, however. Around 80 per cent of each of the three groups expected substantial development in this direction by 1990, although a higher percentage of nonspecialists foresaw an impact by 1985.

Whatever the medium, it was forecast that greater emphasis would be given outside points of view in the future. This prediction was given a mean probability of 0.67. Both newspaper and television specialists differed from this mean rating. The mean for newspaper professionals was 0.09 below the total sample average, while that for the television experts was 0.06 above. Little difference was found among the three groups in predicted date of impact, however. Around 70 to 80 per cent of each group expected substantial impact by 1980, and all were over 90 per cent by 1990, with newspaper experts hitting 100 per cent by that date.

Access to media executives was expected to be lessened as media consolidation increases in Florida. The mean probability assigned this prediction was rather low, only 0.52. Once again, newspaper specialists gave a lower mean probability than the total sample, while television experts provided higher probability ratings. A high percentage of both of these groups of specialists expected

substantial impact fairly early, while nonspecialists didn't foresee change until later. (See Figure 5.) Perhaps this difference reflects a higher estimation on the part of media specialists of their accessibility today than is actually felt by nonspecialists.

In television, increased cable capacity was expected to provide greater public access. Mean probability was 0.68. Newspaper experts provided a somewhat higher mean probability, at 0.73. Television specialists were least sanguine about early developments along these lines, while the group with the highest percentage of respondents expecting substantial impact by 1980 was newspaper professionals. (See Figure 6.) The estimates of these two groups merged by 1995, however, while a higher proportion of the nonspecialists foresaw greater public access through cable by 1990 and beyond.

Cable television was also expected to provide greater media exposure for a specific segment of the public, minority groups. A mean probability of 0.59 was assigned. Newspaper experts provided somewhat higher probability ratings, while television experts were a bit more skeptical. When it came to estimating date of impact, however, the three groups were in general agreement, with roughly 60 per cent of each expecting substantial impact by 1980. This percentage rose to just under 90 for 1995.

Another feature expected to arrive with greater cable television capacity is instant viewer reaction to specific programs. A mean probability of 0.57 was given for this prediction. Nonspecialists were somewhat less optimistic, assigning a mean probability of 0.52. Date of impact was estimated quite similarly by all three groups, with around 40 per cent expecting substantial impact by

1980, 55 per cent by 1985, 75 per cent by 1990, and 85 per cent by 1995.

Respondents also predicted that "one non-partisan TV channel will be used exclusively by government." The mean probability was rather low, however, at 0.52. Television experts assigned an even lower probability, only 0.44, while nonspecialists were more optimistic, at 0.58. The three groups varied widely in their estimates of the date of substantial impact, with television specialists the most skeptical and nonspecialists again the most optimistic. (See Figure 7.) By 1990, however, newspaper professionals and the nonspecialists had converged, and television experts were not far behind. This was the only event of the twenty-eight presented in this paper for which the proportion expecting substantial impact by 1980 fell below 20 per cent. That this occurred for the group most directly affected by the innovation perhaps should not be surprising.

Not only was an exclusive government channel foreseen, but respondents also predicted that "leased channels in Florida will be available on CATV for government, education, public service, etc." Mean probability was 0.69. There was wide disagreement among the three groups of respondents, however. Both the newspaper experts and the nonspecialists had a mean probability rating of 0.06 above the total sample mean, while television experts fell all the way down to a 0.59 mean probability. This is the largest deviation, 0.10 in absolute value, from the total sample mean probability for this study. It was reached only one additional time, for the next event to be discussed. In their predictions of date of substantial impact, however, the three groups did not differ greatly. About

half expected substantial impact by 1980, about three-fourths by 1985, and about 90 per cent by 1990.

Cable television expansion was expected to lead to another service also, "local origination in the cable area." A high probability, 0.71, was given this event. Television experts were especially optimistic, with a mean probability of 0.79. Non-specialists, on the other hand, fell 0.10 below the total sample mean. The three groups generally agreed on estimated date of substantial impact, with the curve for the total sample following much the same path as for the previous item.

Legal Impact

Respondent unanimity was particularly high concerning the probability of events in the legal area. All three groups had mean probability estimates within 0.05 of the total sample mean for each of seven legal items.

A mean probability of 0.60 was assigned "strengthening newspapers' rights and freedoms to print." All three groups agreed not only on the probability of this happening, but also on when it would occur. About 80 per cent estimated such strengthening would take place by 1980, and 90 per cent or more of each group thought it would happen by 1985.

Contradictorily, respondents also agreed that "there will be further state regulation of all mass media." The probability assigned was lower, however, at only 0.51. Newspaper professionals saw such increased regulation occuring at the earliest date, with slightly over 60 per cent of that group estimating an impact by 1980, as opposed to only about 45 per cent of the nonspecialists and about 35 per cent of the television experts. (See Figure 8.)

A high percentage, about 85, of both newspaper and television respondents saw a significant impact by 1995, however, while only just over 70 per cent of nonspecialists foresaw such an impact by that date.

Some specific types of regulation of the media were predicted. "Tighter legislation to limit media ownership" was assigned a mean probability of 0.69. About half the respondents expected developments along these lines by 1980, and 90 per cent or more expected this sort of legislation by 1990.

A mean probability of 0.64 was assigned to the prediction, "There will be an extension and further development of the right of privacy concept to protect citizens in the state." Media professionals were in very strong agreement on the likely timing of such an occurrence, with about 85 per cent of both newspaper and television experts predicting significant impact by 1980. (See Figure 9.) Of the nonspecialists, on the other hand, only 60 per cent predicted a strong likelihood of impact by that date. The three groups converged by 1990.

A "truth in reporting" requirement was given a mean probability of 0.59. While the three groups of respondents showed some disagreement on early developments, most did agree that such a requirement was likely by 1990. (See Figure 10.) Interestingly, all of the nonspecialists predicted a high likelihood of this event by the year 1985, while newspaper experts were unanimous in expecting this development by 1990.

Legal action to extend a specific media right was also predicted. A mean probability of 0.60 was assigned the passage of legislation

"to uphold confidentiality of news sources." Newspaper professionals had the highest percentage predicting this development at all dates: Over 80 per cent in 1980, over 90 per cent in 1985, and 100 per cent in 1990. (See Figure 11.) Television experts and nonspecialists stood about 15 to 20 percentage points behind at 1980, and generally followed by slightly less than that margin for the remaining periods.

Print media were expected to come under increasing pressure, however, "to provide 'equal space' for opposing views, similar to the 'equal time' ruling for television." A mean probability of 0.65 was given. Newspaper specialists saw such a development as coming much earlier than experts in the other two groups. (See Figure 12.) Over 90 per cent of the newspaper professionals expected such increased pressure by 1980, and they were unanimous in expecting increased pressure by 1985. Television experts and nonspecialists, on the other hand, assigned later dates, with only about 65 per cent expecting increased pressure by 1980.

Economic Impact

In the area of economic and competition concerns, three of the seven predictions showed lack of unanimity in mean percentages across the respondent groups. These differences of opinion often seemed to reflect the vested interests of the groups.

All three groups of experts agreed, however, on the likelihood of information becoming greatly important as a commodity. The mean probability level was 0.70, relatively high for this study. Differences did appear in estimates of the timing of this event, however. (See Figure 13.) For 1980, both television experts and nonspecialists were in rough agreement, with about 60 per cent of each group expecting a high likelihood of significant impact by

by that date. Newspaper specialists, on the other hand, were more likely to expect an early impact; over 80 per cent of these experts predicted substantial impact by 1980. The predictions converged over time, though, and over 90 per cent of each of the three groups agreed that an impact is likely by 1995.

While information will become greatly important as a commodity, it was predicted that fewer newspapers will be available to carry it to the public. A mean probability of 0.70 was assigned the statement, "There will be fewer newspapers in the state because of rising production costs." As might be expected from their competitive position, experts from television assigned a higher probability to this statement than the average. Nonspecialists, on the other hand, assigned a lower mean probability, perhaps due to unfamiliarity with the rapidly rising production costs of newspapers. Newspaper experts were more likely than members of the other two groups to assign an early date to this prediction of the demise of some newspapers. Some 80 per cent of newspaper professionals expected significant developments along this line by 1980, while only 60 per cent of television experts and nonspecialists made this prediction. By 1985, however, the percentages converged.

Not only were fewer newspapers predicted, but it was also expected that those remaining would trim their delivery areas. A mean probability of 0.68 was given the prediction, "The soaring cost of newsprint will force the curtailment of delivery to many fringe areas of the state." Experts from outside the newspaper field were much more likely to see this happening at an early date, however. (See Figure 14.) Even by 1995, only about three-fourths of the newspaper experts expected such delivery cuts to take place

on a significant scale. All nonspecialists, and over 90 per cent of the television experts, foresaw a substantial impact by 1990.

This smaller number of newspapers, with their truncated delivery areas, was expected to be in the hands of group ownerships. Mean odds of two out of three were given the prediction, "Economic factors will encourage trend toward group ownership of newspapers, ending the truly 'locally' owned newspapers." As might be expected, newspaper experts assigned somewhat lower probabilities to this prediction. All three groups of respondents were roughly in agreement on the time frame for such concentration developments, with about half expecting a significant impact by 1980, about three-fourths by 1985, and about 85 per cent by 1990.

Cross-media competition was also seen as a factor in decreasing newspaper numbers in Florida. A mean probability of 0.60 was given the statement, "There will be fewer newspapers in the state because of increased reliance on television news." Nonspecialists foresaw an especially early impact here; all of them predicted significant likelihood of impact by 1985. (See Figure 15.) Newspaper specialists, on the other hand, did not expect an early impact, as would be expected. For as late a date as 1995, only just over 70 per cent expected a substantial likelihood of this development.

Within the field of television greater competition was also expected. The present dominant system of free television was foreseen as facing greater challenges from both cable and paid television. Mean probability overall was 0.71. Newspaper experts assigned a lower probability of this development, and nonspecialists gave it a higher probability than the group as a whole. There were some differences among the three groups in estimated date of impact

for early periods, but newspaper and television experts converged by 1985 at about 80 per cent, and nonspecialists joined them in 1990 at about 85 to 90 per cent.

Subscription television was expected to have a substantial impact in the state as a supplemental service. Mean probability was 0.61. The percentage of respondents in each of the three groups who said they expected a substantial impact remained relatively low across all time periods. (See Figure 16.) While newspaper and television experts were in rough agreement on the timing of this impact, nonspecialists lagged some 10 to 25 percentage points behind until 1995.

Round 4: Probes Into Broad Issues

In round four, we asked respondents to depart from the format of the previous rounds. They were asked a set of broad, open-ended questions, and provisions were made for in-depth responses.

A total of 47, or 8 per cent of the total sample, responded to this round. This included 32 communication specialists (15 newspaper experts; 17 from television), 13 nonspecialists, and 2 unknowns (who clipped off their identification numbers before returning the completed questionnaires).

In looking ahead to the year 2000 and considering the single economic event which would have the greatest influence on newspapers, there was little doubt in most (24) respondents' minds that production costs are the important consideration. Further, the shortage and rising cost of newsprint is a major element in production costs. Also included, however, are costs for distribution, labor, staff, and retooling for electronic production.

But for the "good news," there was a substantial number (9) of respondents who saw a population increase in Florida as possibly expanding newspaper circulation and advertising rates.

Other economic considerations were the energy shortage, the rise of electronic journalism, and lack of advertising. A few decided that a total collapse of the economy was ahead in the future, while another looked forward to the end of the depression. One person saw the rise of socialism and state-controlled media, thus ending competition and the media as we know them today.

Some of the comments of the respondents to the economic consideration question are enlightening. One person who saw increased cost and shortage of newsprint as the important consideration in the future wrote:

> "This appears very ominous to me; I can see no way to either avoid or absorb it without eventually increasing rates to subscribers, and I think that price is almost to the top."

Another respondent who spoke about the rising cost of newspapers and rising cost of transporting them believed the costs "would necessitate raising prices of newspapers -- in many cases out of the budgets of low and middle-low income families."

One respondent cited production and labor costs, commenting that "news holes will be reduced, subscription rates will be much higher; 'fringe area' circulation will be deleted."

Another person agreed that cost of news gathering and printing "will reduce size and expansion."

Two persons found agreement in these comments:

> "Newsprint shortage and increasing production costs will result in fewer general coverage newspapers and necessitate new production technologies."

> "I foresee constantly rising costs of newspapers which will limit the number of people who can afford them. The great hope of eliminating this danger lies in new technological developments which will change the costs and manner of producing newspapers."

One person who cited the cost of distribution and transportation as the main economic consideration suggested a possible technological solution:

> "However, by the year 2000 it also appears that the newspaper as we know it today will be fed right into the home, electronically. And the homeowner will pay for that transmission as he does his light and water bills."

Another respondent turned his statement into a question: "Will the ever-increasing cost of advertising space begin to outweigh the benefits of print advertising?" He answered himself by speculating: "Perhaps the advertiser will begin to cut back on the proliferation of small shoppers and community newspapers in order to reap the benefits of large circulation major dailies."

One respondent thought that the high cost of pulp would probably drive newspapers into paper substitutes.

Two respondents articulated the economic "good news" for newspapers from increased population in the state:

> "People growth. Florida will have 25 million people in 2000. They will be affluent people. They will be served by many more community papers. The 'reader market' so able to buy will spur newspaper advertising, particularly shopping advertising -- foods, drugs, appliances."

> "Unprecedented population growth and the necessary services to accompany it . . . newspapers, particularly suburban, will naturally benefit."

When asked about the single economic consideration in Florida which will have the greatest influence on television, the most frequent response category (11) dealt with costs to the medium. However, a greater number was concerned about the energy shortage for the electronic medium (7) than for the print medium (4). Production and programming costs received the majority consideration, but the cost of advertising also was mentioned. Two additional respondents thought that the rising costs of entertainment and information in general would work to the benefit of television since people could stay at home and watch the tube more cheaply than attending to other media.

One of the persons citing increasing production costs as the major consideration wrote that such costs "will change programming concepts as we know them today and result in local, less expensive programming in areas not covered by TV today."

Another respondent predicted rising production costs "will increase the temptation to cut corners on production costs and lower program quality."

Population increase and a resulting increase in local, independent stations and cable organizations received six mentions.

Four respondents saw cable television as having a considerable economic impact, especially on commercial television. One person commented:

> "Many stations currently serving in the top 100 will shift to top 10-20 while cable origination will fill the lower level. Community programming gap already prominent in broadcast television."

Economic considerations for television spread over more topics than for newspapers. Such considerations as the severe depression, the end of depression, more leisure time, viewer interest and lack of viewer interest, development of solar energy, tighter governmental restrictions, the rise of socialism, pay TV, and tourism received limited mention.

Two of those concerned with the energy shortage as an economic consideration for television wrote:

> "Scarcity of energy could cause stations to be on the air only a few specified hours. Cost to consumer could be so high that advertising would not support broadcasts so consumer would have to do this through pay television."

> "As energy becomes scarcer and costlier, the mode of communication which uses the least energy to transmit a unit of information will gain at the expense of its competitors. I am not aware of any studies of comparative energy use, but I strongly suspect that in terms of energy efficiency the rating would be radio, first; newspapers, second; and television, third. If I am right, we will see newspapers gaining on television in advertising effectiveness and radio gaining on both newspapers and TV."

Another respondent who cited the price and availability of electricity and receiving sets for consumers as the prime economic consideration for television also added: "Countering this trend is TV's ability to cut down on the need for transportation of people." Still another person concerned with the high electric and energy costs noted: "TV will have even more advantage of newspapers because its cost per thousand is much less." One other person who saw television's economic future as bright commented: "While television viewing already is at an all-time high, a depression would force more viewership and thus enhance television's pre-eminence. People will do without newspapers in order to keep TV, if that choice is forced."

In summary, the economic considerations for newspapers and television in the future reflect a concern for inflation in relation to production costs and, in turn, to advertising revenues and consumers' costs -- a status quo survival mentality. In all of this, however, technology is obviously going to intervene in some way, and the respondents speculate about electronic newspapers, commercial television's relation to cable and pay TV, and so on.

Three questions were asked of the respondents which may shed more light on this future constellation of balance or imbalance among current and new media. The questions were: Considering the growing popularity of non-print media, what roles do you believe newspapers will play in the future? What do you see as the greatest long-term social effect that television, including CATV, will have on the average Floridian? What do you foresee as the greatest long-term social effect that newspapers will have on the average Floridian?

Although a sizeable number of respondents (10) saw newspapers in the future as adjusting to an increasing orientation to visual presentation or as having a minor role in relation to the non-print media, most (28) saw newspapers as having a major role in the future due to particular characteristics which other media could not displace.

If there is any one characteristic that foreshadows the newspaper's role in the future, according to the respondents, it would be that medium's position as a source of detail and depth coverage, with more information, more diversity, and more investigative abilities than the other media. Another characteristic mentioned often is the newspaper's preservable copy, as one respondent said, "for reference and referral in relation to news and advertising."

One respondent speculated that in the future the newspaper will

develop its own system that would allow remote printouts, perhaps in homes, offices, and central distribution points. Three respondents saw newspapers in the future as the medium for intellectual elites, as performing an educational function by encouraging people to remain literate, and as catering to specialization of interests. They predicted there will be more national special interest papers. A few others saw newspapers moving to a more personal and local flavor, while two others foresaw newspapers assuming more responsibility for news coverage. One respondent predicted a larger editorial content for newspapers.

Those who saw newspapers in the future adjusting to the non-print media envisioned it as playing a major role, but in different form such as facsimile, or in a merger into TV as a read-out over CATV. Another respondent thought the newspaper's future was in doubt and predicted it "will probably serve as advertising media and event calendar for regional news and as a platform for editorial comments with supporting documentation." Three who foresaw newspapers in a "minor" or diminishing role thought they would revert from dailies to weeklies.

In looking at the results of the two questions on long-term social effects that television (including CATV) and newspapers will have on the average Floridian, it appears that television is both damned and praised more than newspapers. Also, the ability of television to bring information and entertainment to people received considerably more attention than was the case for newspapers.

Twenty-two responses about the social effects of television spoke to such topics as providing people with more involvement in decision-making at all levels of government; providing a wider access to vast amounts of information -- social, academic, cultural, informational; providing the ability to keep the public well-informed in general; and increasing educational levels and awareness. Two additional person

spoke about the future ability of television to provide a sensitization to "world-connectedness."

On the other hand, only seven responses spoke to the role of newspapers in keeping the public informed, and these items included such notations as to "keep freedom alive," and "guardian of the people's right to know." The most frequently mentioned event (6) for newspapers was that of greater concentration on local events and local areas.

Other items mentioned for long-term social effects of television included bringing people closer to their communities; allowing part in media action; helping the vastly increased population to learn to live in the area without destroying natural assets; and continuing to be the greatest source of entertainment.

The respondents who foresaw negative social effects coming from television in the future (10) predicted, in their own words:

"A decreased sensitivity to violence."

"Dependent on TV for state, national, and international news in little packages which lack depth and a resulting narrowing of the viewers' outlooks."

"Decreased desire to read or obtain information in any way that's not relatively simple or visual."

"Making them [average Floridians] even more mediocre and stereotyped than they already are."

"Further destruction of book and magazine-reading habits."

"Boredom."

"Reduce people to puppets . . . "

"Diffuse and confuse them, thus running them into entertainment."

"Degenerative moral influence."

"Total deterioration of mass thinking."

One respondent had thoughts about CATV's relationship to television:

"I cannot consider these in the same breath, because CATV simply cannot exist without stealing from 'free' television.

> I feel now that the proliferation of CATV signals and importation of distant signals by CATV will continually splinter the audiences available to free television, to the point commercial television will cease to have the resources to program, either as it does now or as it would be able to in the future. The audiences will be smaller, the advertising dollar fewer to the station. It's as inevitable as is the proliferation of information eventually available from CATV in the form of up to 80 channels. There will be so much to watch the average viewer won't know where to turn, and all the current demands about 'access for minorities' will be accomodated until someone realizes there's no one listening at the other end."

Several items mentioned in conjunction with the long-term social effects of newspapers dealt with more and better coverage. As one respondent commented: "Newspapers will continue to supply meat to the bare bones offered by television, but lethargy of the populace simply won't have it if they have to pay more for it."

Other respondents foresaw newspapers less as opinion molders but rather as carrying more factual information; aiding persons to remain literate; and serving an "ombudsman" role.

Newspapers came in for their own share of concern if not criticism for their long-term social effects. Two respondents thought newspapers would have little or no social effect. Two more thought that newspapers will have lessening effect on social order with fewer persons relying on newspapers for news. Another thought their effect will be questionable since they offer few advantages over the other media except ability to read text details that might not be covered otherwise. A few were rather harsh in their concern about the future effects of newspapers. One commented that "there is biased public thinking through slanted news at present time; no effect whatsoever unless newspapers change their concept from distributors of news to fact-finders and educators." Three others wrote:

> "It depends on how responsible newspapers remain, how much they continue to play the part of the conscience of the community."

> "Unless a more definite wording of owners' viewpoints, we will still have a certain amount of people who won't see two sides."

> "It depends on the papers. If they are gutless -- none! If they have courage and ideals, it might inspire better citizenship and richer lives."

When asked what single political consideration in Florida would have the greatest influence on newspapers and television in the future, the overriding topic was some general or specific controls -- political, legal, governmental -- on the media. A few were in favor of such controls; many more feared them.

In another related questions the respondents were asked if they would like to see more, about the same, or less government intervention in the mass media. Twenty-nine wanted less government intervention (21 communication specialists, 7 nonspecialists, 1 unknown). Thirteen (9 specialists, 4 nonspecialists) wanted about the same intervention, while only three (1 specialist, 2 nonspecialists) called for more. One communication specialist had "no opinion."

There were many written comments about the topic, from citation of specific laws and court cases affecting the media to a general statement of the "continuing battle to preserve freedom of the press from government." Some said the press must contribute to and protect such a freedom by remaining responsible. One statement by a person in television who wanted less government intervention summarizes the comments succinctly:

> "I suspect both newspapers and television will be in this same boat when it either sinks or is rescued; I'm talking about federal legislation either affirming television's first amendment rights or abridging newspaper's first amendment rights by promulgation of an 'equal time' or 'fairness doctrine' statute. I pray the former; I fear the latter."

The respondents were given a chance to add any other comments they had to the round four questionnaire. Only a few chose to do so. One seemed to have just enough energy left to write: "I'm glad this survey is over." On the same topic, another wrote: "This survey has been slightly annoying and without much purpose in the long run. Also, I

feel that I ought to be given a copy of the final report. Will I?"

Two others had thoughts about predicting futures:

> "I think all this business of trying to conjecture what may happen in the next 25 years is a lot of baloney. None of us in our civilization may be here five years from now with the nuclear arms race going full blast. All it takes is one crazy leader -- and, going by history, that is inevitable."

> "Any speculation over the next 25 years is fraught with danger because of the intangibles: (a) the energy problem and (b) advanced technology. As these two areas go so will the information media. Advancing technology can help all media get to the reader and viewer at a profit for the publisher or TV management but a lack of energy can send everything in the opposite direction."

Others directed their last comments to the state of the media.

One person in computer manufacture said:

> "I would like to see the TV, radio, and newspapers in the immediate future back the common sense law of the public -- (1) Politics, all viewpoints; (2) Law enforcement; (3) Government, for [the] reason we have [it]; (4) Courts, definite guilt punished; (5) Work, the right to and the right to have; (6) Religion, all may have own; (7) Rights, protected individual and corporate; (8) Property, protected and right to protect."

A newspaper professional wrote:

> "The inherent danger of additional legislation is through its restrictive nature and potential effect upon freedom of the press -- and ultimately upon free speech. Proposed legislation in this area is more likely than not to be the result of a special interest group or that of a self-serving politician who has suffered from the exposure of the Press."

Another respondent in computer or communication hardware manufacture commented: "Bias is the single biggest threat to television -- reporting fairly without editorializing or implied evaluation. Today's news reports contain so many one liners at the end as to destroy good reporting."

A person in the television industry noted:

> "I am certain that my comments are slanted toward TV being the more effective medium over newspapers -- TV is the newspaper of the modern generation -- although already very powerful, I believe it will become even more so with people relying on TV and cable offerings for news, information and entertainment even more than now."

A lawyer active in communications law wrote:

"The age of true journalism -- true newspapermen -- is dead. This age, if one can call it that, is for the business-oriented executive. First make the finances by printing or saying what they think the public wants to hear or see, then think of the true story. There are no more newspapermen, only educated reporters and editors."

A newspaper person wrote:

"The Media will remain alive and well and a growing influence, each segment, print or electronic making its contribution in the unique way attributable to it alone . . . performing its own specific function best. There will be a continuing thirst for news, information and entertainment for an increasingly sophisticated audience with more time and money to spend in selective ways."

SUMMARY AND CONCLUSIONS

The study reported on in this paper had two major purposes: (1) to examine the future role of mass media in the rapidly growing state of Florida; and (2) to experiment with the Delphi technique.

A total sample of 558 persons was drawn for the study. They represented two groups: communication specialists and nonspecialists. The communications specialists were drawn from Florida's television and newspaper professionals. The nonspecialists were considered specialized media consumers because of the nature of their occupations: communication lawyers, business leaders, journalism educators, computer and communication hardware manufacturers, state senators and representatives, and state supreme court justices.

Four rounds of mail questionnaires were distributed to the sample. The first round accumulated possible events which would reflect television and newspaper developments up to the year 2000. The second round asked for assignment of probabilities to the likelihood of occurrence of the events. The third round called for consensus of the sample about the probability of occurrence of the particular future events as well as for prediction of the date of significant impact of the events. Round four probed for more understanding of probable future events for television and newspapers.

A major limitation to the study was its decreasing response rates across the four rounds, long a problem for panel studies. Round one had a 29 per cent response rate; round two, 25 per cent of the total initial sample; round three, 13 per cent; and round four, 8 per cent. Because of various modifications of the original Delphi technique in

this study, the extent of the validity based on a minimum of 20 members of each committee is not known. It is not overly reassuring, however, that the salient characteristic shared by the final respondents may well be tenacity rather than expertness.

Other possible limitations, some due to variations of the technique, included use of a mail questionnaire instead of schedules administered in more controlled situations; the large number of items generated and opinionated about; the length of time for the total study (eight months); and the responsibilities and time limitations of the respondents.

Only part of the study was reported on in this paper -- events having to do with social, legal, and economic aspects in the future of the mass media. Technical aspects will be included in a later document.

Of the twenty-eight future events included in this report (on the basis of having an assigned probability of 0.5 or more in round three), fifteen found a high degree of consensus among the experts. These events received mean probability ratings of from 0.51 to 0.73. The remaining thirteen events ranged in assigned mean probabilities from 0.52 to 0.71. Overall, however, the mean probabilities for occurrence of the events were low.

Across the different groups of respondents -- newspaper professionals, television professionals, nonspecialists -- the deviation from consensus was also slight. The largest deviation from the total mean was only 0.10, reached in two items.

The twenty-eight events were arbitrarily grouped into three categories -- social, legal, economic -- although they are not mutually exclusive.

Social impact events included fourteen items, dealing primarily

with the public's trust in and access to the mass media of television and newspapers.

There were seven legal impact events. These were concerned mainly with freedom of the press, with consideration given to public, media, and governmental interests.

Economic and competition events also totaled seven. Rising production costs and inter- and intra-media competition dictated the nature of most of these events.

Conclusions drawn from the results of the study should be considered in light of its limitations, especially the mortality of response rates. Round three predictions about event occurrence and date of impact together with round four's open-ended responses do, however, portray future areas of concern which should provoke further study.

The social roles of newspapers and television in the future were shown high regard by the respondents for the predicted efforts they will make to strengthen public trust. How to get there from here might be a more difficult question.

Television more than newspapers, according to round four responses, will provide persons with wider access to vast amounts of information -- social, academic, cultural -- as well as entertainment, The charge of TV's "vast wasteland" was not lacking in this study, however.

The predictions for the social roles of newspapers seemed two-pronged. The most likely role will be to produce detailed and preservable copy for readers -- to supply meat to the bare bones offered by television, as one respondent put it. The other role, seen by fewer respondents, will possibly be some sort of merger with the non-print media, with newspapers providing supplementary printed information.

Such an adjustment to a visual orientation found supporting evidence in round three from respondents who agreed on the occurrence and early impact of "more and more reliance on electronic media for straight news." Although newspaper experts lagged behind the other two groups in their estimated date of impact, more than 70 per cent of them expected a substantial impact from increased reliance on television news by 1980.

It might be speculated that the newspaper industry has much to be concerned about in looking at newspaper professionals' prediction of dates of occurrence of events in relation to predictions of the other two groups. For legal events, a higher percentage of newspaper experts foresaw the following events impacting earlier than the other two groups: further state regulation of mass media, extension and further develpment of the right of privacy concept, a requirement that media be held responsible for truth in reporting, legislation to uphold confidentiality of news sources, and increased pressure on print media to provide "equal space" for opposing views. Although all three groups took strength from recent court decisions strengthening newspapers' rights and freedoms to print, the newspaper professionals did not show as high percentage agreement on impact of the event over time as the other two groups.

Economic events had a somewhat differing pattern of impact predictions by the newspaper group. This group of experts had a similar trend of predicted early impact for such events as information becoming greatly important as a commodity, fewer newspapers in the state because of rising production costs, and economic factors causing a trend toward group ownership of newspapers. Yet a later impact was predicted by the newspaper professionals than by the other two groups for soaring costs of newsprint forcing curtailment of delivery to

many fringe areas of the state. Perhaps the rationale is that regrouping of newspapers will provide the financial support needed to distribute beyond major cities.

Economic and legal aspects of the future, then, found high agreement among the three groups in relation to event occurrence and long-term impact. But the newspaper group rather consistently foresaw earlier impact. The reason for this particular trend are difficult to speculate about. It could be a function of the newspaper professionals' more constant involvement with depth reporting, which makes them more aware of the impacting future events; or it could be that group's concern for the state of its existence in the face of rising production costs, legal restrictions, and media competition.

The reasons behind the newspaper experts' earlier impact predictions for the many legal and economic events might be important for their future forecasts of social aspects. They had, for instance, early impact predictions on events such as increase in research on ways the average citizen might communicate his feelings through mass communications, increased efforts to avoid a conviction in the press or TV before a case can be called to trial, consolidation leading to limited access to media executives, and demands for mass media accuracy in news reporting. Such social impact predictions might stem from a sense of professionalism on the part of the newspaper specialists, or they might come from an instinct for survival when media credibility and public access to the media are major social concerns.

For all respondents, the current economic situation is playing a large role in the prediction of future events affecting newspapers and television in the state of Florida. For some, rapid population growth in the state is bringing an element of hope for offsetting high production costs. It is felt that additional persons may mean

more circulation and advertising revenues.

Current court cases and decisions as well as governmental regulations are obviously setting the scene for future events predicted by the respondents. Most respondents want less governmental intervention in the media, but many fear that too many press freedoms have been challenged or lost already.

Earlier in the paper, Conrath and Thompson were cited as pointing out that choices about communication devices and systems should reflect societal needs, not just short-run economics and technological feasibility. The respondents in this study supplied many future events having to do with social impact. Yet, one gets the feeling from the various predicted dates of impact and the very nature of the social events themselves that the social concerns of the specialists might be the result of present public and governmental pressures rather than a foresighted overview of choices and decisions. This is often called a "putting out the fires" approach rather than a preventative one. Perhaps it can be hoped that out of the bewilderment and confusion of economic setbacks, media competition, and legal entanglements, societal needs will be thrust forward to the center stage as choices are made for the future.

The implications of the study are numerous. We think we have a better idea of many of the future issues of concern to media producers and consumers in Florida. At the very least, the predicted future events will establish some important baselines for further study and discussion of the future of newspapers and television in Florida.

The use of the Delphi technique, at least this modified version, has shown both its limitations and its advantages. The authors, in looking back over the long study, would proceed in similar future studies in a somewhat different manner. One possibility is to use

the round four approach of broad issues and open-ended responses to establish a list of future events for respondents to rate in round two. Another approach would be to avoid use of the expensive, time-consuming mail questionnaire, and instead to call together a number of communication specialists and nonspecialists for a weekend conference at a central location. The rounds of the Delphi technique could then be administered in a more controlled situation and during a shorter period of time. Many communication professionals have commented that they would take time for so-called "airport conferences" although other meeting situations would be avoided. The Delphi and other future forecasting techniques will undoubtedly become increasingly important for long-term future planning. They deserve more attention in the field of mass communication than they have received to date.

An implication which the authors would particularly like to emphasize is one which only a few respondents noted. It relates to the "information gap" hypothesis. One event which became lost to this study in round two for lack of sufficient support was "end of the written word." But it was revived again in a somewhat different way when two respondents spoke to the function of print media for the intellectual elite, and another spoke to the print media's educational role in keeping literacy alive. Regardless of what shapes the media take in the future, care must be taken to avoid the possibility of "information superficiality." Otherwise, if information does become totally a commodity, the have's and the have not's of mass communication will become distinct entities.

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TABLE 1

MEAN PROBABILITIES OF SIGNIFICANT IMPACT BEFORE 2000[a]

Event	Total sample	Respondent group: Newspapers	Television	Nonspecialists
Social impact				
There will be strenuous efforts by media to strengthen public trust.	.73			
There will be an increase in research in Florida on ways the average citizen might communicate his feelings on various subjects to other citizens through mass communications.	.64			
Floridians will demand that the news media be accurate in reporting.	.68			
Increased efforts will be made to avoid a conviction in the press or TV before a case can be called to trial.	.68			-.05[b]

a. Probabilities may range from 0.0 to 1.0.

b. In these columns for the separate respondent groups, a negative value indicates that the group mean was below the total sample mean by the magnitude given; a positive value indicates that the group mean was greater than the total sample mean by the magnitude given.

TABLE 1
continued

Event	Total sample	Respondent group: Newspapers	Television	Nonspecialists
Social impact				
More and more reliance on electronic media for straight news will occur.	.73			
Commercial television will become the single most dominant influence medium.	.59			+.08
There will be greater emphasis for outside points of view expressed in all mass media.	.67	-.09	+.06	
There will be increased consolidation of the media in the state leading to limited access to media executives.	.52	-.07	+.05	
Cable TV capacity in Florida will provide greater public access to television.	.68	+.05		
Minority groups will be heard via special CATV channels.	.59	+.05	-.05	
Cable TV capability in Florida will provide instant viewer reaction to specific programs.	.57			-.05

TABLE 1
continued

Event	Total sample	Respondent group: Newspapers	Television	Nonspecialists
Social impact				
One non-partisan TV channel will be used exclusively by government.	.52		-.08	+.06
Leased channels in Florida will be available by CATV for government, education, public services, etc.	.69	+.06	-.10	+.06
Cable TV capacity in Florida will provide local origination in the cable area.	.71		+.08	-.10
Legal impact				
After Times vs. Sullivan and Miami Herald vs. Tornillo, there will be a probable strengthening of newspapers' rights and freedoms to print.	.60			
There will be further state regulation of all mass media.	.51			

TABLE 1
continued

Event	Total sample	Respondent group: Newspapers	Television	Nonspecialists
Legal impact				
There will be tighter legislation to limit media ownership	.69			
There will be an extension and further development of the right of privacy concept to protect citizens in the state.	.64			
There will be a requirement that media in Florida be responsible for "truth" in reporting.	.59			
There will be legislation in Florida to uphold confidentiality of news sources.	.60			
There will be an increased pressure on print media to provide "equal space" for opposing views, similar to the "equal time" ruling for television.	.65			
Economic and competition impact				
Information in Florida will become greatly important as a commodity.	.70			

TABLE 1
continued

Event	Total sample	Respondent group: Newspapers	Television	Nonspecialists
Economic and competition impact				
There will be fewer newspapers in the state because of rising production costs.	.70		+.06	-.07
The soaring cost of newsprint will force the curtailment of delivery to many fringe areas of the state.	.68			
Economic factors will encourage trends toward group ownership of newspapers, ending the truly "locally" owned newspapers.	.67	-.05		
There will be fewer newspapers in the state because of increased reliance on television news.	.60			
Free television will face greater challenges from CATV (cable television) and paid television operations in Florida.	.71	-.07		+.05
Subscription television will become a viable (economically) supplementary service to free home television.	.61			

FIGURE 1

"There will be strenuous efforts by media to strengthen public trust."

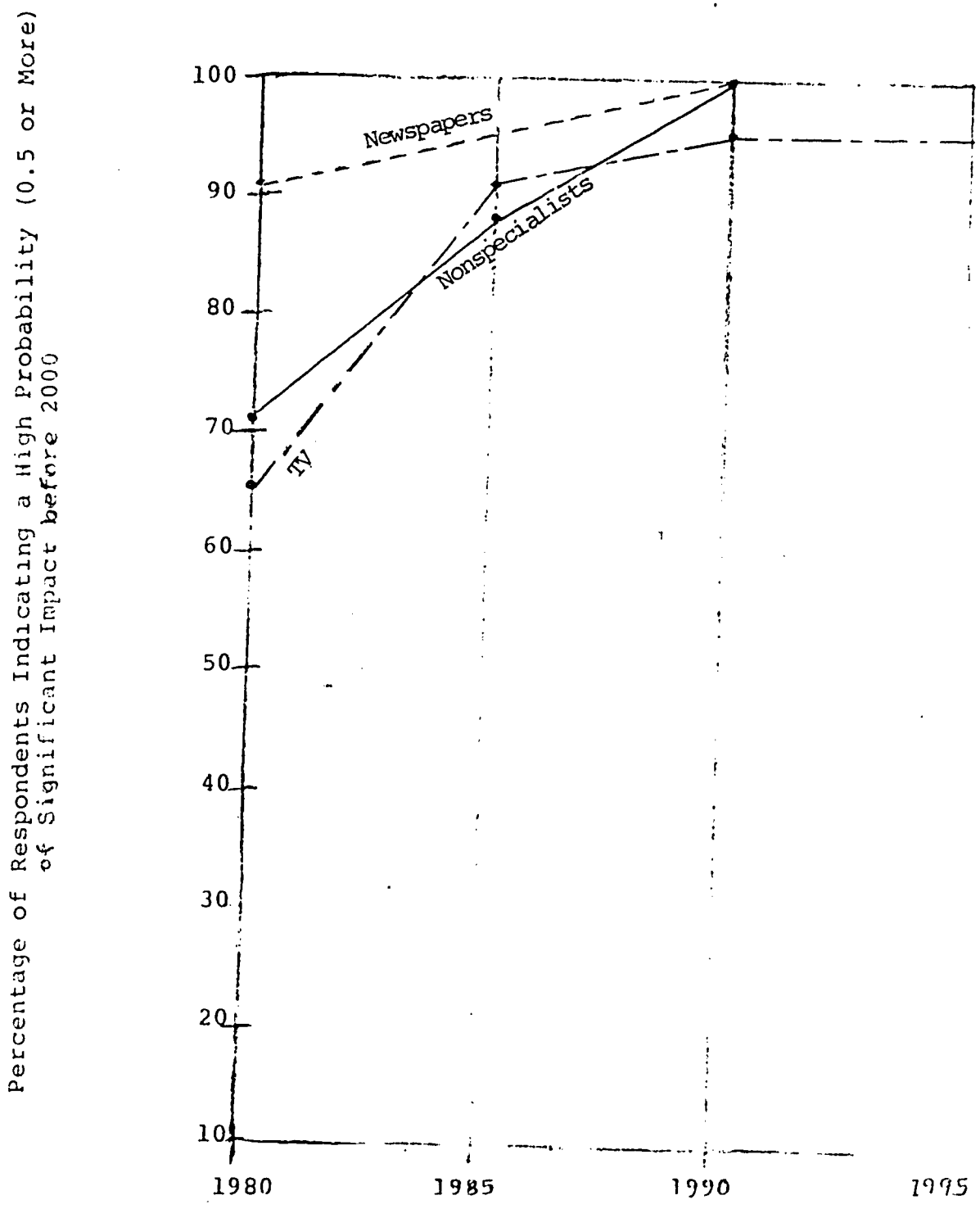

FIGURE 2

"There will be an increase in research in Florida on ways the average citizen might communicate his feelings on various subjects to other citizens through mass communications."

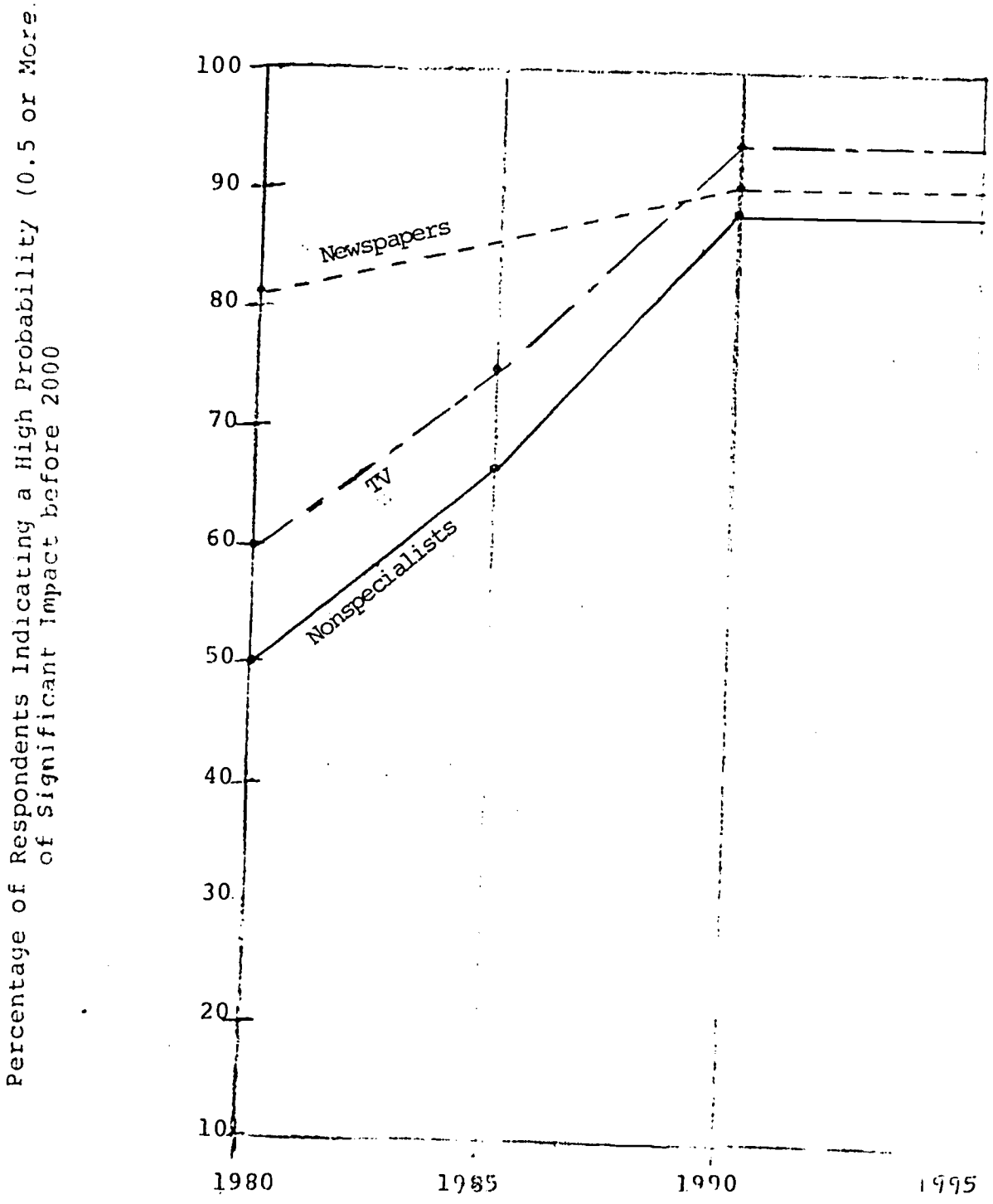

FIGURE 3

"Increased efforts will be made to avoid a conviction in the press or TV before a case can be called to trial."

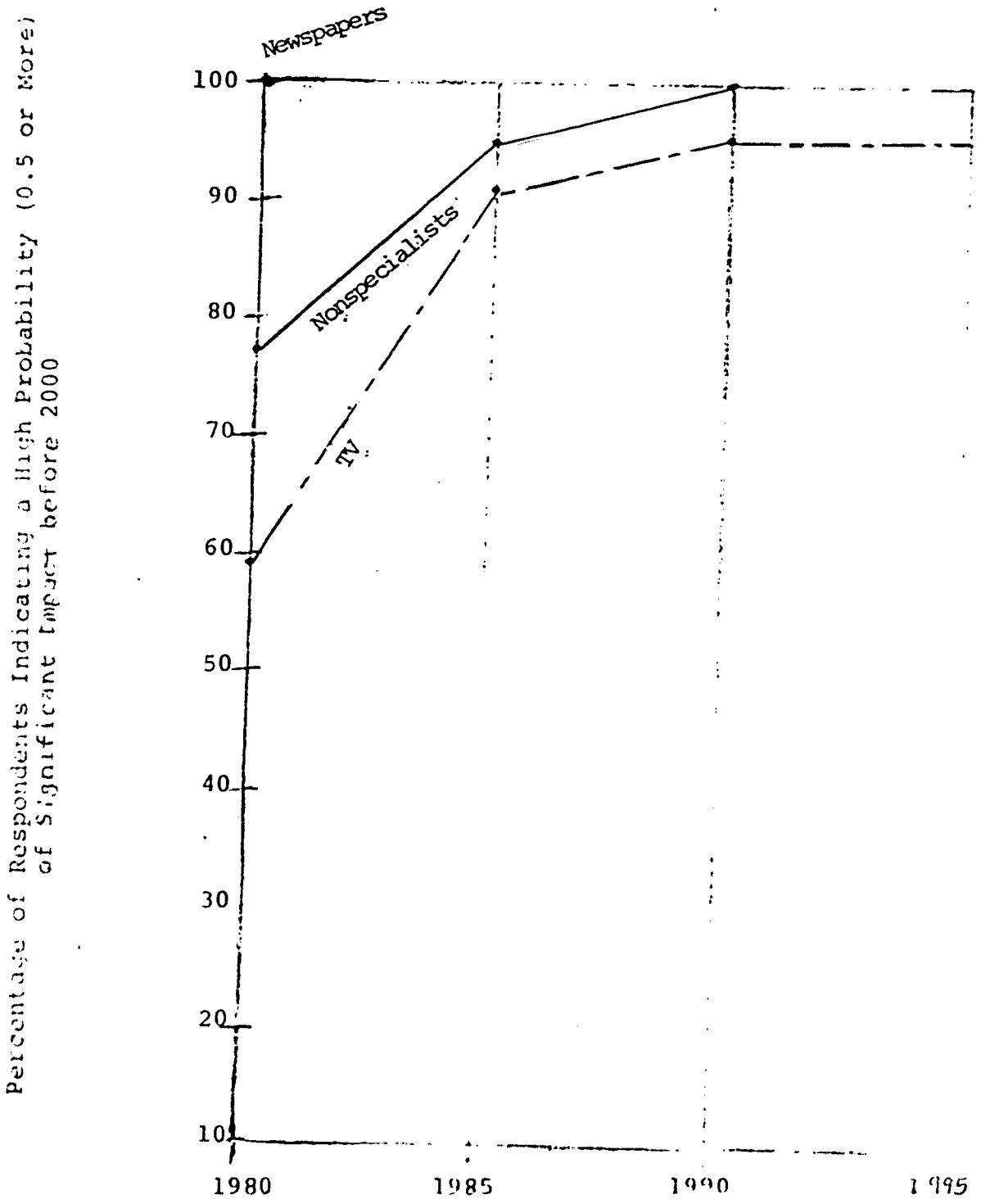

FIGURE 4

"More and more reliance on electronic media for straight news will occur."

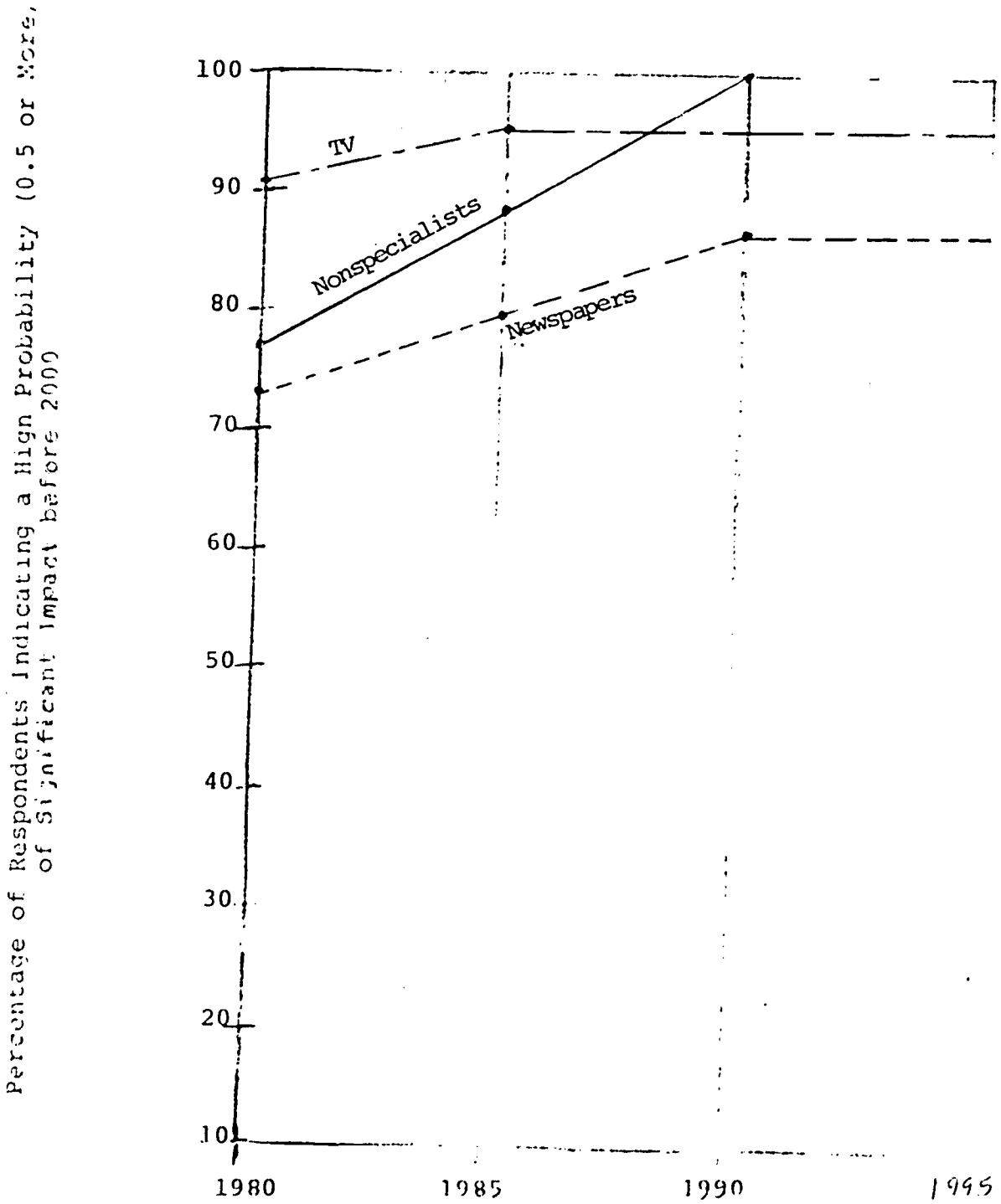

FIGURE 5

"There will be increased consolidation of the media in the state leading to limited access to media executives."

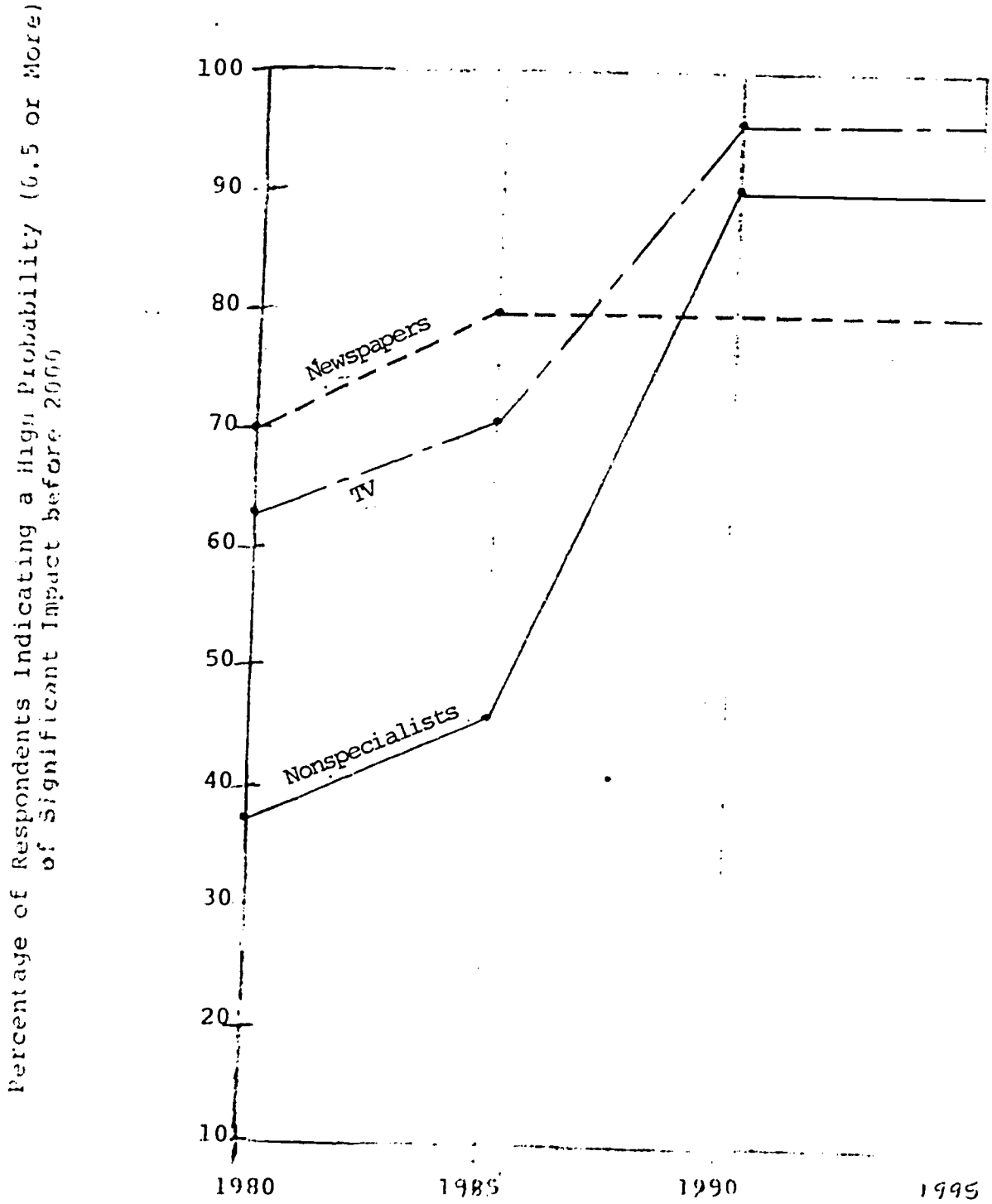

FIGURE 6

"Cable TV capacity in Florida will provide greater public access to television."

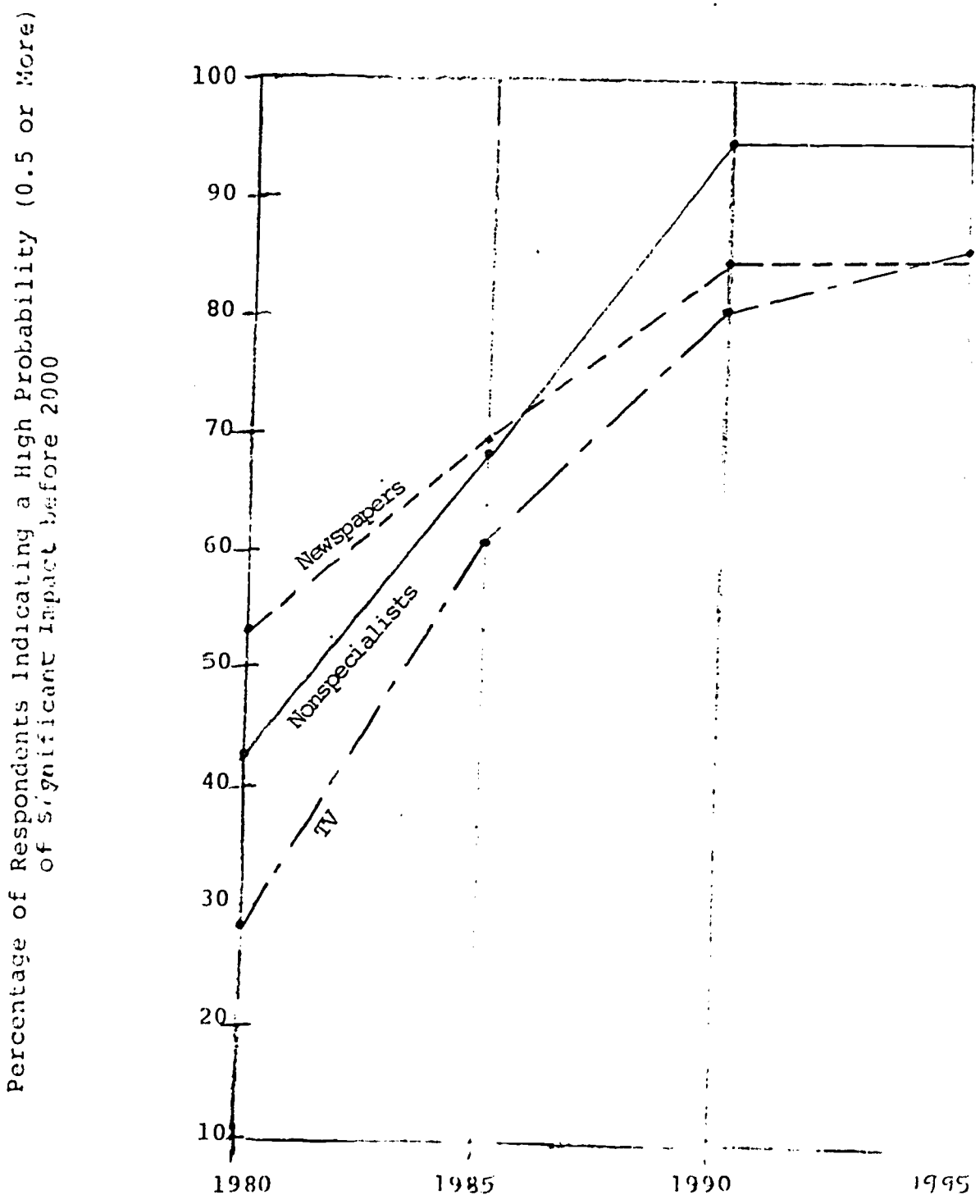

FIGURE 7

"One non-partisan TV channel will be used exclusively by government."

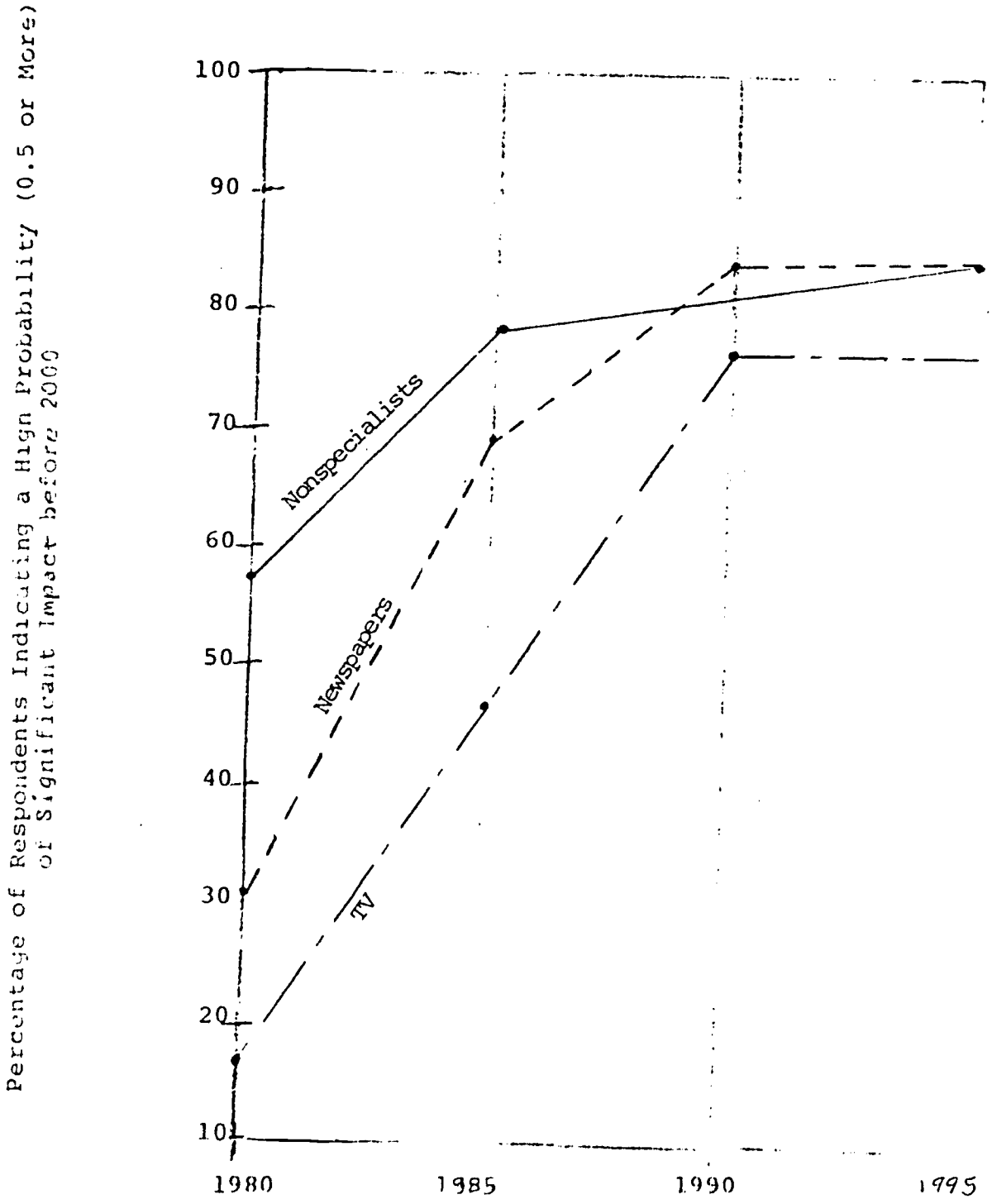

FIGURE 8

"There will be further state regulation of all mass media."

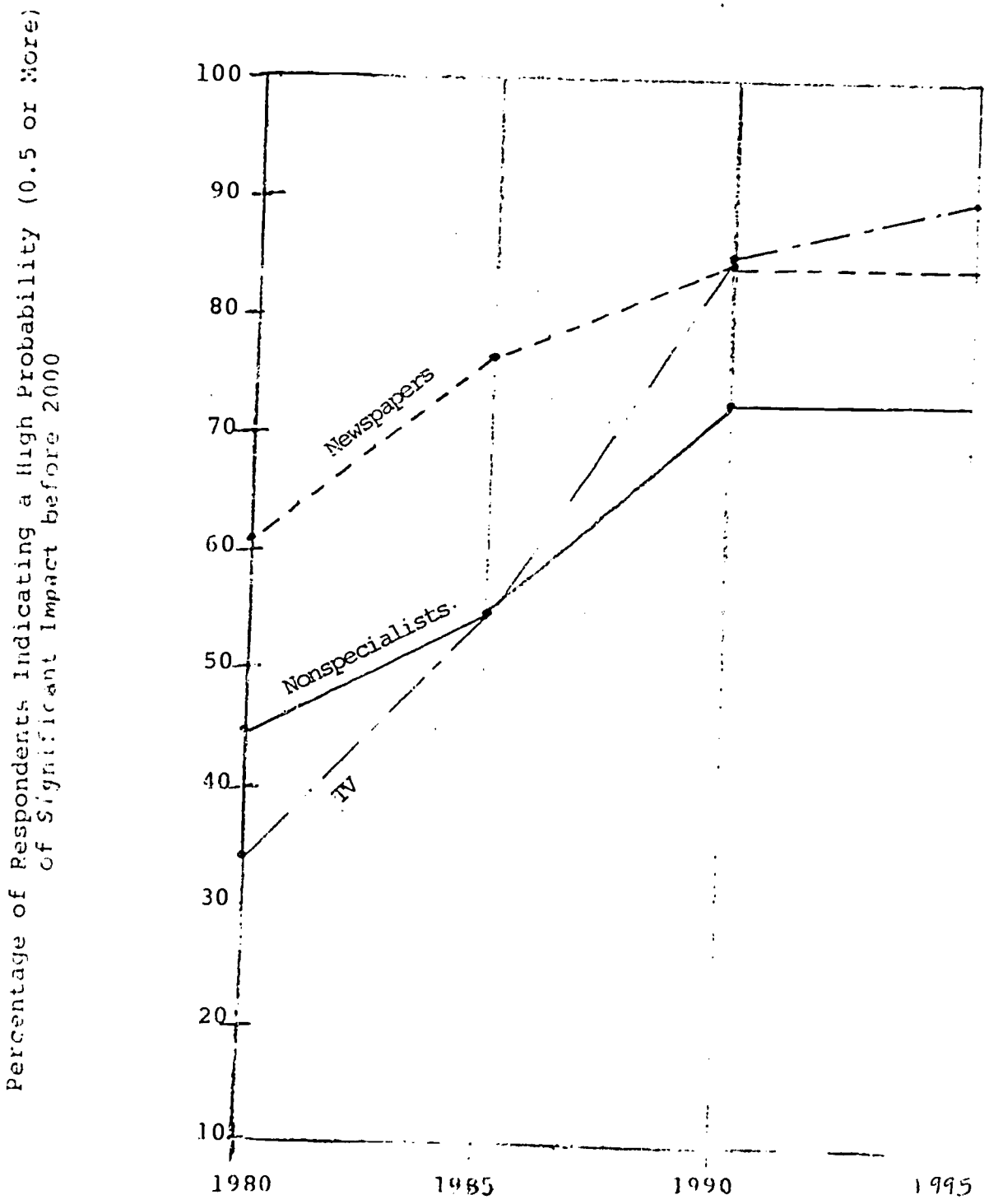

FIGURE 9

"There will be an extension and further development of the right of privacy concept to protect citizens in the state."

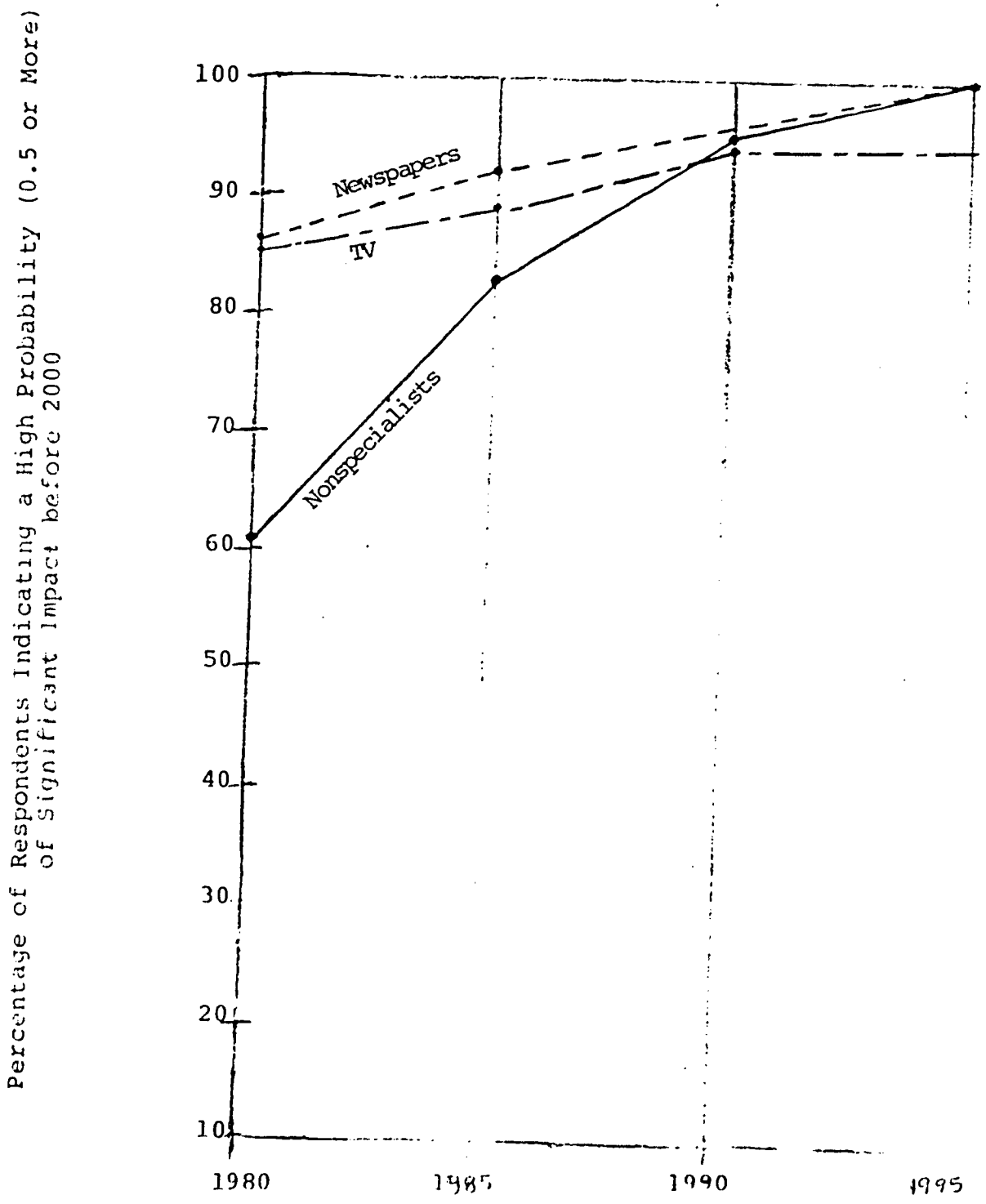

FIGURE 10

"There will be a requirement that media in Florida be responsible for 'truth' in reporting."

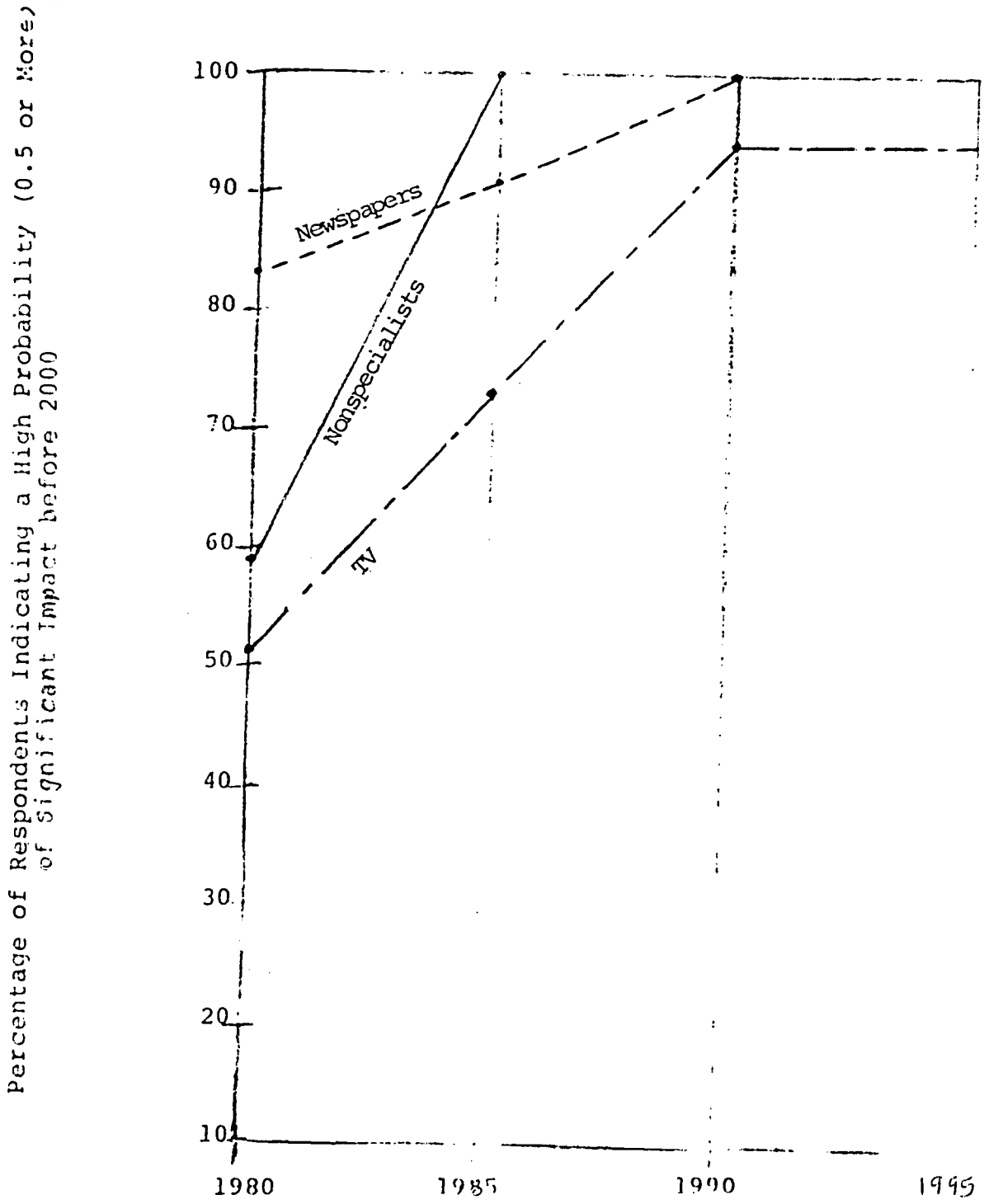

FIGURE 11

"There will be legislation in Florida to uphold confidentiality of news sources."

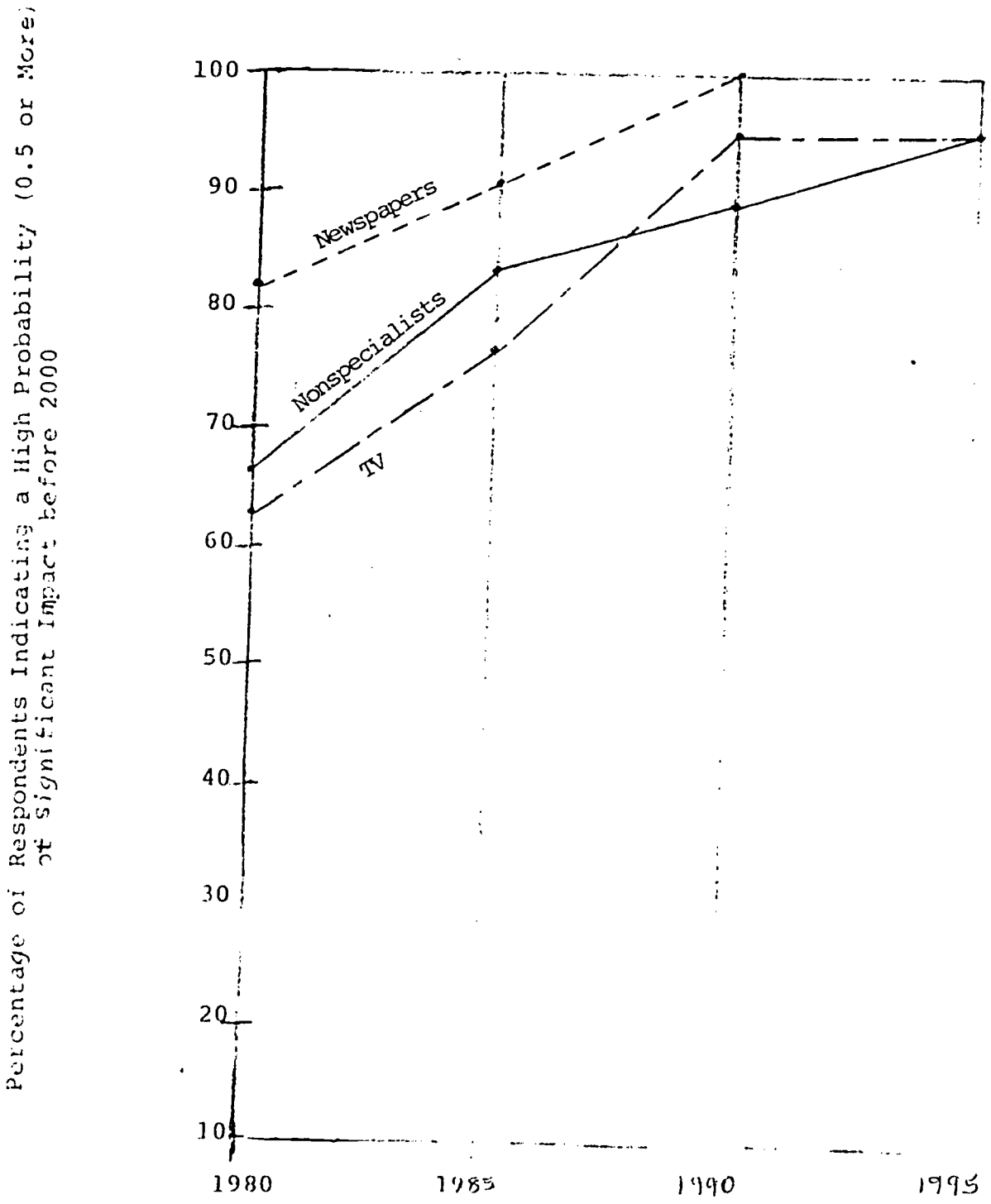

FIGURE 12

"There will be increased pressure on print media to provide 'equal space' for opposing views similar to the 'equal time' ruling for television."

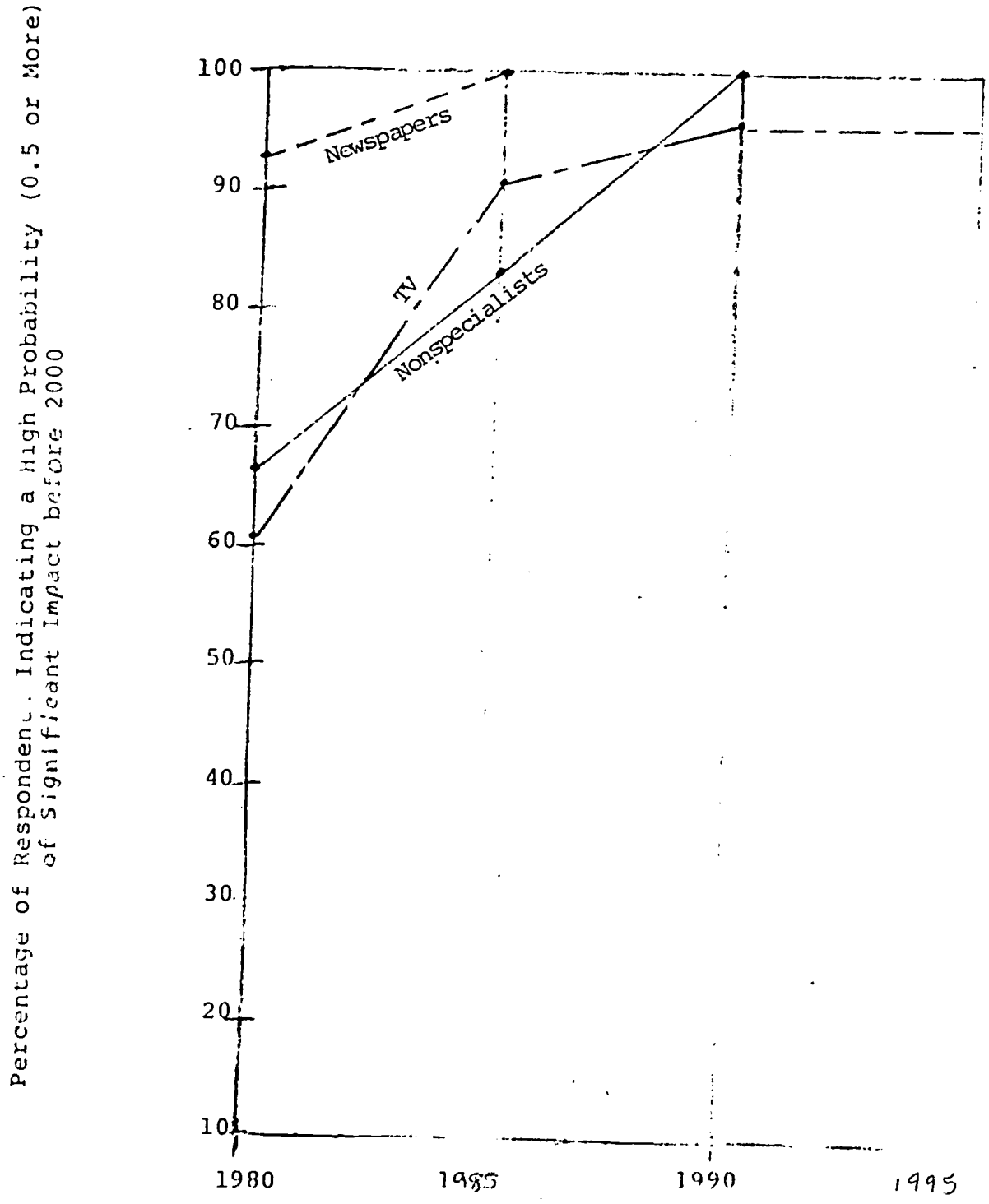

FIGURE 13

"Information in Florida will become greatly important as a commodity."

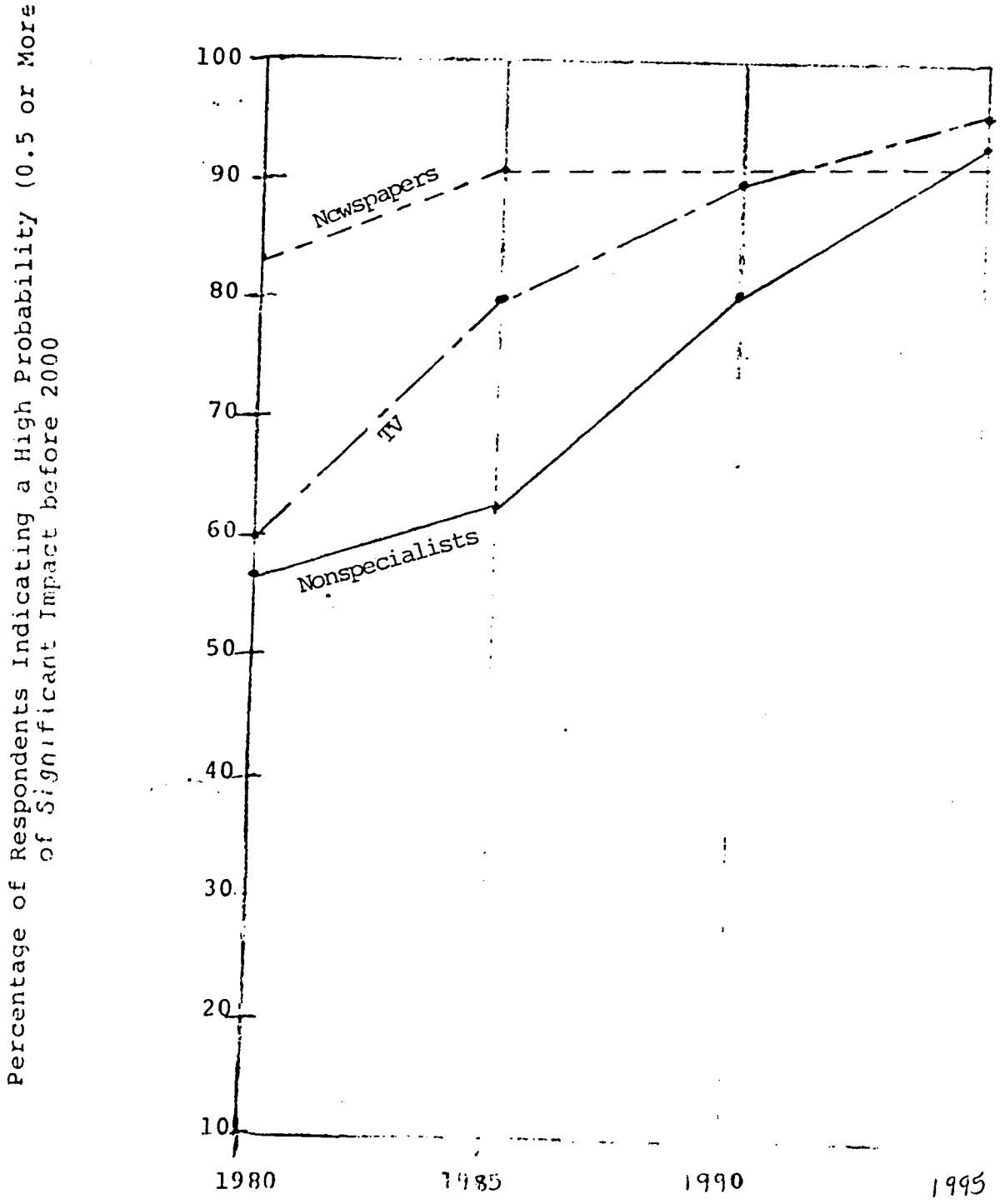

FIGURE 14

"The soaring cost of newsprint will force the curtailment of delivery to many fringe areas of the state."

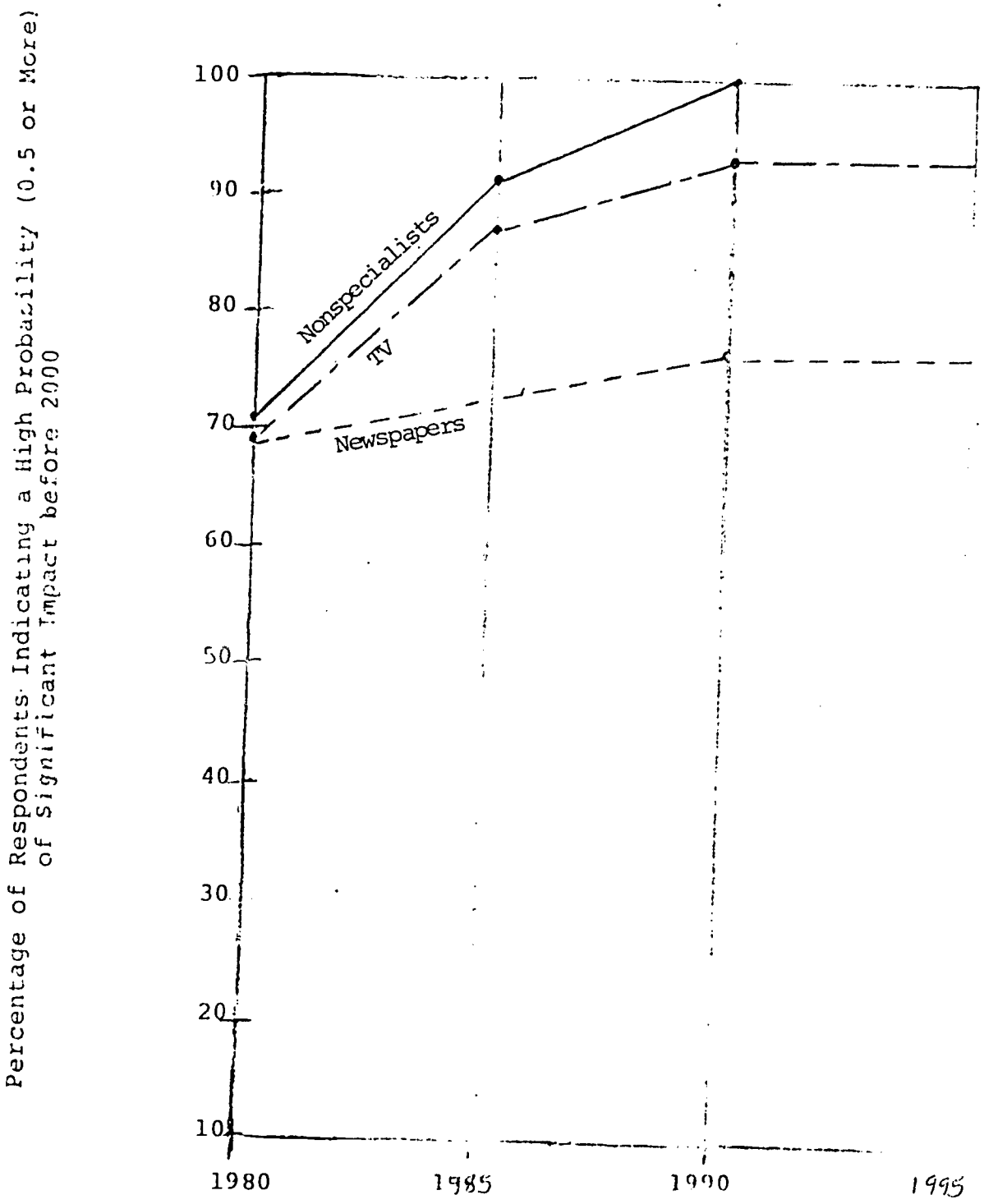

FIGURE 15

"There will be fewer newspapers in the state because of increased reliance on television news."

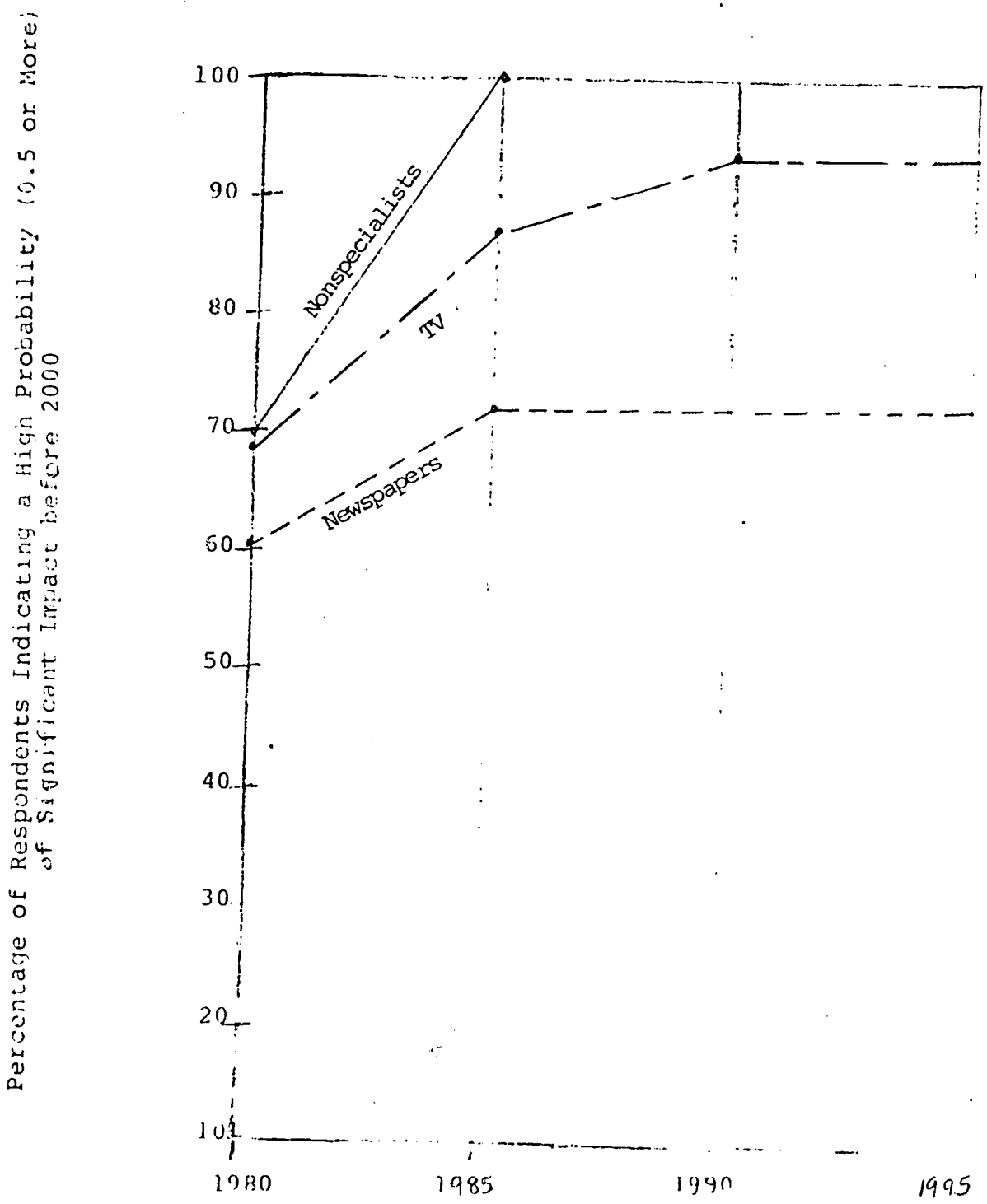

FIGURE 16

"Subscription television will become a viable (economically) supplementary service to free home television."