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# Counting on Diversity: Approaches to Tracking Sources in U.S. News Organizations

Cydney Grannan <sup>a</sup>, Benjamin Toff <sup>a</sup> and Kathleen Searles <sup>b</sup>

<sup>a</sup>Hubbard School of Journalism & Mass Communication, University of Minnesota, Minneapolis, MN, USA;

<sup>b</sup>Department of Political Science, University of South Carolina, Columbia, SC, USA

## ABSTRACT

Growing numbers of U.S. news organizations have begun systematically tracking the diversity of the sources quoted or featured in their coverage in efforts to address long-standing problems of inequity in their newsrooms and reporting. These efforts have received only limited attention from scholars. This descriptive paper takes stock of these initiatives and offers a typology of three approaches to source tracking: what we call retroactive source auditing, real-time source tracking, and automated source monitoring. We discuss practical and analytic trade-offs associated with each approach including the characteristics that can be tracked, how well integrated approaches are with newsroom workflows, how each involves different considerations with respect to how data are handled, and the actionability of that data on news production practices. As more and more newsrooms consider implementing initiatives designed to track diversity in sourcing patterns, we argue for the importance of further scholarship evaluating the impact these approaches may have on journalistic practice as well as the content of news coverage.

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In recent years, growing numbers of newsrooms in the United States have implemented diversity, equity, and inclusion initiatives aimed at improving both the representativeness of their reporting as well as more responsive engagement with minoritized communities (Brown et al. 2023). These initiatives have often grappled especially with matters of sourcing, reflecting the importance of *who* is selected to speak for a given community. Indeed, previous research shows that sources affect the content of news, as well as perceptions of the news (Ross 2007; Shoemaker and Reese 1996; Tuchman 1972). Yet studies have long shown that the diversity of sources in most coverage is rarely equitable or reflective of the communities news organizations seek to serve (Jia et al. 2016; Macharia 2020; Mellado and Scherman 2021; Searles et al. 2023; Zeldes and Fico 2005).

One increasingly common approach taken to address these shortcomings in source diversity has been the implementation of auditing or tracking who is named in coverage, often motivated by the underlying assumption that surfacing more consistent metrics around sourcing will lead to improvements in their diversity. While if (and how) such

efforts may affect source diversity remains an important unresolved question, in the present study we seek to first develop a clearer understanding of what these emergent newsroom practices look like in theory and trade-offs around what implementation involves in practice. By taking stock of how news organizations are approaching such efforts, we offer a typology of three different industry approaches around source tracking, identifying key questions and trade-offs that arise when each approach is taken. By surveying approaches to source tracking at news organizations, we aim to help both scholars and practitioners interrogate what source tracking seeks to achieve and how such practices may or may not close the gap between actual sourcing practices and benchmarks for improving diversity.

We begin by considering prior research and reporting on sourcing and diversity, equity, and inclusion (DEI) initiatives within the journalism industry, including source tracking efforts. Next, we summarize each of the three approaches we identified in our review and describe four key questions and tradeoffs around each of these approaches. We conclude with a discussion of the implications of these approaches and consider what their impact may be (or can be) on journalism in light of the structural and individual biases that may ultimately constrain such practices.

## Literature Review

### *Sourcing Practices in Journalism*

The role of sources in news and journalists' sourcing practices have been considered at length in previous research. Journalists' reliance on sources is often understood in the context of the profession's objectivity paradigm: Sources provide reporters not only with opinion (which reporters themselves are discouraged from sharing) but also with evidence that events happened at all (Ericson 1998; Reich 2009). Indeed, sources are the "primary definers" of social reality (Hall et al. 1978), and their position is privileged over other positions (Carlson 2009). Due to this ability to define the news, sources can be considered to be vying for coverage in order to favorably shape the news to their advantage (Cottle 2000; Gans 1979; Schlesinger 1990). This competition for coverage is sometimes referred to as a competition for news access (Reich 2008).

Existing research on sourcing practices focus mainly on bias in sourcing in news content (Dominick 1977; Gans 1979) as well as how journalists build source networks and make decisions around what sources to include in their work (Ross 2007; Tuchman 1972). Sigal's (1973) landmark study found that journalists tend to rely on sources who are easily accessible and from positions of authority, favoring officials and press releases (see also Reese, Grant, and Danielian 1994; Whitney et al. 1989). More recent studies have found journalists continue to favor elites holding official positions, which in turn makes the news that is produced reflective of and indexed to elite positions (Mathisen 2023; see also Bennett 1990).

Other studies have emphasized the routinization of sourcing practices. With journalist-source conversations typically occurring on tight deadlines, reporters "learn how to find sources that can readily be scheduled and who will provide the kinds of information they seek in a concise and manageable way" (Berkowitz 2019, 167). This can lead journalists to turn to the same sources in story after story rather than devoting time to identifying and

cultivating new sources and expanding their sourcing practices. This aligns with Reich's assessment that journalists seek "maximum information, from a minimum of news sources, with maximum reliability based on previous acquaintance" (2009, 88). Wheatley, likewise, distinguishes between routine channels of news production (including PR material and predictable events) and non-routine channels of news production (including unexpected events and leaks), with the former typically being "cheaper, quicker to produce" and more likely to "provide guaranteed content" (Wheatley 2020, 293). Using sources from official events like press conferences or communication offices of government officials, then, may better align with journalists' deadline-driven workflows. In his study of Israeli journalists' sourcing practices, Reich (2009) finds that journalists privilege established sources (sources that talk with journalists at least monthly), senior sources (those in higher positions), and spokespersons.

Prior studies have also focused on the degree to which journalists' reliance on elites and public officials combined with routinization tends to reify structural and racial inequalities (Lawrence 2023). As Searles et al. (2023) found in their study of journalistic sourcing practices of political experts, many journalists populate their source networks with prestigious individuals, or what is often referred to as the "golden rolodex" (Soley 1992). As a result, expert news sources are disproportionately white, male, full professors hailing from high-status institutions. Such sourcing disparities replicate and reinforce the same disparities found in academia. Interestingly, in the same study, the authors found that journalists' expert sourcing decisions were in contrast with their preferences. In several experiments they found that journalists express a preference for non-white, male expert sources. Similarly, in a survey conducted by the *Associated Press* of 750 journalists on sourcing, most said race and ethnicity was the most important dimension when considering diversity, but nearly half said they never or rarely request experts of color (Newsome 2021). There exists, then, a gap between the sort of sources journalists say they prefer, and the sort of sources journalists actually source.

Beyond the lack of diversity among experts and elite sources (Carlson 2009; Searles et al. 2023), journalism scholarship has also considered the question of source diversity in general, defined as "the presence of different types of social actors, voices and points of view" (Mellado and Scherman 2021, 974) or as "the presence of all relevant differences in the news reflecting society as a whole" (Heft, Ramsland, and Mayerhöffer 2024, 240). A newsroom's conception of source diversity can also be tied to source demographics, such as race, gender, and class (Martindale 2006). Scholars often frame the importance of diverse sourcing as an important aspect of democracy (Mathisen 2023), arguing that symbolic representation may affect how people think about the value or relevance of news altogether. Toff and Palmer's (2019) research on news avoidance, for example, suggests that the relative absence of women sources may be associated with "news-is-for-men perceptions" among women news avoiders (although see also Paul et al. (2022), which found no significant effects on outlet or reporter credibility). Implicit in this argument is the idea that what sources make visible—that is, their ascriptive characteristics—matter for the audience, whether because diversity might be instrumental (by reflecting the audience) or normatively desirable (in highlighting diverse perspectives). Of course, this is not to say that what is *not* rendered visible by source choices is unimportant to the news-making process; sourcing behaviors have been found to affect how journalists anchor an argument, frame a story, and the information selected

(Coddington and Molyneux 2023; Reese and Shoemaker 2016; Steiner 2012). Instead—in part because of how the audiences experience the news—the ways in which newsrooms think about and measure such diversity is certainly different. In sum, we can think of distinguishing between how sources may visually represent difference, versus how sources may represent other non-visual or non-visible dimensions of diversity such as in content expertise or differing abilities. While all dimensions of diversity should be further studied, for this study we focus on those characteristics of source diversity that newsrooms express interest in through their public efforts, which results in our focus on demographic characteristics.

We should note that the focus of source tracking initiatives (and the present study) is on named sources, as opposed to sources that are anonymous, unnamed, or who speak with reporters on background. Despite the fact that journalistic norms generally discourage the use of anonymous sources, U.S. news organizations regularly publish articles with unnamed sources (Carlson 2011). Additionally, public officials often hold “off-the-record” briefings that shape the type of future coverage journalists pursue (Schlesinger 1990). However, existing source tracking systems focus predominantly, if not exclusively, on named sources.

### ***Diversity and DEI Initiatives in Journalism***

One common explanation for these gaps involves long-standing disparities in representation within U.S. newsrooms—a subject of considerable interest of late across the industry but hardly a new problem. The lack of racial diversity among journalists’ ranks has been a documented issue in the U.S. since the 1940s (Mellinger 2013). Despite efforts to increase racial diversity among staff members, U.S. newsrooms are more white and male than the country’s overall population (Grieco 2018).

Since the killing of George Floyd at the hands of Minneapolis police and the subsequent racial justice protests that followed, more U.S. newsrooms have invested or reinvested in diversity, equity, and inclusion (DEI)<sup>1</sup> initiatives to address issues within news organizations and within news coverage. Broadly, newsrooms’ DEI efforts aimed to ameliorate inequities among staff pay based on race and address issues of problematic coverage of minority communities. These efforts included installing DEI managers to focus on internal newsroom operations such as hiring and retention of a diverse newsroom; implementing new strategies to engage with audiences, such as community advisory boards; and analyzing and changing sourcing practices (Ganguli 2022). A 2021 Medill survey found that roughly 80% of journalists viewed DEI initiatives favorably, and more than half reported that their news organizations have staff positions dedicated to DEI work (Burns 2022).

Crucial questions remain about the effectiveness and longevity of DEI initiatives following the 2020 racial reckoning (Brown 2022). Some scholars and practitioners argue that more changes need to be made if DEI efforts are to be effective: Minich et al. (2024) consider how journalism education at universities can better prepare reporters and newsroom professionals to minimize harm to marginalized communities by teaching conscientious and non-extractive reporting practices. Wenzel (2023) argues that DEI initiatives will likely be unsuccessful unless accompanied by accountability infrastructure wherein those with power, such as news organization leadership, are responsive to the needs and concerns of members of the community they purport to serve.

## Organized Efforts around Tracking Sources

It is against this backdrop of growing emphasis on DEI within U.S. newsrooms that several prominent news organizations have taken steps to track and quantify the range of sources featured in their coverage. In so doing, many explicitly link these efforts to broader DEI initiatives or specific goals to change the characteristics of who they quote in news articles. For example, National Public Radio has tracked demographic information of sources since 2013 in an effort to “look and sound like America,” and the news organization says source tracking has “led to more inclusive storytelling while also highlighting places where we need to improve” (NPR n.d.). Similarly, Minnesota Public Radio launched a source diversity tracking system as part of its efforts of reaching “the goal of reflecting the voices of all Minnesotans” (Glover 2022). Others have engaged in similar efforts with specific aims around increasing representation of particular groups in their coverage. LAist, the public media outlet covering the Los Angeles area, created a Diversity, Equity, and Inclusion Task Force in 2020 with a stated goal of tracking sources in an effort to “increas[e] the percentage of Latinx experts featured in stories” (Woo n.d.). The *San Antonio Report* began tracking source demographic information in 2023 for similar reasons. As the news outlets’ editors wrote, “While who we quote and use as news sources is often affected by structures of power and influence in our city, that doesn’t mean our work has to reflect those structures” (Munsil and Méndez 2023).

To be sure, efforts to address the lack of source diversity are not new. In the 1980s, Gannett began auditing its content for racial diversity, and multiple regional papers had source diversity tracking initiatives in the early 2000s (Martindale 2006). In the twenty-first century, efforts around diversifying sourcing have been linked to different approaches to journalism, such as civic journalism (Kurpius 2002), community-centered journalism (Wenzel 2020), and trust-building journalism, an umbrella term for a variety of journalism movements including solutions and engagement journalism (Robinson 2023). According to a 2020 Reuters’ Institute report surveying 136 global news industry leaders, more than four-in-ten news organizations tracked or monitored their source diversity following the killing of George Floyd (Cherubini, Newman, and Nielsen 2020).

Broadly, we argue that all of these efforts fall under the umbrella of what can be called “source tracking,” or news organizations’ systematic efforts to identify and quantify differences in the types of sources quoted or featured in their own coverage, including demographic information about sources (Scarpelli 2022). The term “source audits” is also used to refer to retroactive assessments of source information (Wenzel 2021; see also practitioner perspective Sung, Blakely, and Tong 2021), although some may use the term to broadly refer to any processes that track and analyze source diversity (Shang et al. 2022; see also practitioner perspective Long-Middleton n.d.). While source tracking does not necessarily need to be conceived of as part of news organization initiatives around DEI, these efforts are often described as such since tracking sources can help to reveal patterns of routinization and potentially serve as a mechanism for evaluation of professional practices. When successful, at least in theory, such efforts will arguably invite journalists and newsrooms to grapple with and consider how their sourcing practices contribute to disparate sourcing patterns.

What are the different approaches that newsrooms are taking when it comes to source tracking? Prior research has focused mainly on analyzing singular case studies through

ethnographies at public media organizations, including Wenzel's (2021) examination of a source diversity initiative within National Public Radio (NPR)-affiliate WHYY's broader "cultural competency" project. In that study, Wenzel outlines the challenges the newsroom faced in tracking source diversity (namely in terms of reporter commitment to the project) and changing sourcing practices, which were incapacitated by institutional barriers and reliance on the notion of journalistic objectivity. In another example, Scarpelli (2022) looks at how NPR and its Texas affiliate KUT track and analyze source data using technology embedded in the content management system (CMS), the editorial publication software. Scarpelli's research also highlights pushback from reporters and tensions around setting diversity quotas for sources.

This descriptive study aims to categorize and assess the main characteristics underlying contemporary approaches to source tracking in U.S. newsrooms. In so doing, we also discuss what these approaches to source tracking reveal about the instrumental reasons newsrooms engage in these efforts, but our main focus here is toward developing a more consistent taxonomy that can be used by both academics and practitioners who wish to evaluate source diversity tracking initiatives or conduct research around such efforts. As more of these efforts around source diversity are implemented, we argue there is a growing need for clarity around what source diversity tracking efforts involve, identifying key analytic and practical trade-offs around how these practices are deployed, and highlighting the considerable unresolved questions around what these efforts reveal about newsroom motivations. Whether implicit or explicit, source diversity tracking is often motivated by larger newsroom imperatives around improving DEI. However, before we can evaluate how effective such efforts are at achieving DEI aims, we need to first understand *what* newsrooms are doing.

## Methods

To complete this overview and develop the typology of approaches to source tracking we outline in the next section, we conducted a wide-ranging inquiry of both academic and industry reporting on relevant efforts to audit or track sourcing at U.S. news organizations. We canvassed publicly available information and combined this review with additional correspondence with several practitioners at organizations referenced in identified materials. With respect to public reporting about source tracking and auditing initiatives, we consulted 23 news organizations' public statements about source diversity tracking initiatives and 16 public-facing articles from outlets covering the journalism industry such as *Columbia Journalism Review* and Nieman Journalism Lab. We supplemented these reports with academic literature covering known examples of source tracking initiatives. We identified relevant literature by searching the archives of *Journalism*, *Journalism Studies*, *Digital Journalism*, *Journalism Practice*, using keywords such as "source diversity," "source audit," "source diversity tracking," and "diversifying sources." Additionally, we spoke directly to individuals involved in these efforts at Minnesota Public Radio News and LAist, as well as staff at the American Press Institute who oversee Source Matters,<sup>2</sup> a third-party tool designed to facilitate news organization efforts to track the diversity of their own sourcing. These conversations were determined by convenience sampling. Eight conversations occurred with members of these organizations; researchers followed up with members at these organizations by email to clarify details if necessary.

While these were not formal interviews (as the data were the source tracking systems themselves as opposed to the discussion), this personal correspondence helped provide a more in-depth understanding of how these organizations conduct source diversity tracking beyond that which could be provided through published reporting. These conversations also helped us to generate additional suggestions to lend breadth to our review. We used inductive textual analysis to analyze news organizations' public statements, public-facing articles, and our conversation notes with individuals involved in source tracking efforts to help develop our typology.

Our review of the academic and professional literature is not comprehensive of all source tracking approaches or of all news organizations using source tracking—nor was that our intention. Rather, we have sought to describe the landscape of source diversity tracking efforts as illustrated through the most prominent approaches. Reviewing public-facing literature about source tracking allowed us to assess how news organizations articulate their processes, motives, and goals around source tracking. This allows us to develop a typology of approaches, which can then be used to inform future research considering the implementation and impact of source tracking efforts. It additionally allows us to highlight less common approaches to conducting this work, many of which may become more feasible for newsrooms as technologies provide new avenues for tracking source networks.

In an iterative dialogue between the authors we settled on the typology proposed below, which helped crystallize the most important dimensions of each approach. We take up this discussion in the last section.

## A Typology of Approaches to Source Tracking

Our review of the academic and industry literatures as well as our correspondence with relevant practitioners involved in source tracking efforts led us to identify three common approaches to the nascent practice. We refer to these as: retroactive source auditing, real-time source tracking, and automated source monitoring (see [Table 1](#)). These approaches are not discrete; overlaps exist. However, we distinguished between them in terms of four areas: (a) when during the editorial process sourcing data are collected, (b) how source data are collected, (c) when during the editorial process sourcing data are analyzed, and (d) how source data are analyzed. While real-time source tracking and automated source monitoring may overlap in terms of how source data are analyzed

**Table 1.** Summary of approaches to source tracking.

	Retroactive source auditing	Real-time source tracking	Automated source monitoring
What sourcing data are collected?	Sources are identified retroactively in corpus of news stories selected by sampling across specific dates or topics.	Sources are identified in real-time by reporters or producers as they report stories, and relevant sourcing characteristics are systematically tracked in a database	Sources are identified and categorized using automated computational methods examining news content either in content management systems or after publication.
When are sourcing data collected?	After publication	During reporting or immediately after publication on an ongoing basis	During reporting or at any point after publication
Examples	Impact Architects, DIY systems	Source Matters, DIY systems	Dex from NPR; DIANES

(e.g., in an automated fashion), these could differ in terms of when the data are analyzed (e.g., before or after a story is published). In this section, we provide an overview of the approach and an initial assessment of its strengths and weaknesses.

### ***Retroactive Source Auditing***

The most prominent approach we identified in both the academic literature and industry reports refers to what are known as retroactive source audits. This term is typically reserved for initiatives where news organizations (or contractors hired by them) review the quoted sources featured in news stories over a discrete period of time. These often occur “post-mortem”—after the reporting, editing, and publishing process is complete. Wenzel (2021) observed that retroactive source audits can be used to provide baseline demographic information of sources, and reviewing these data can quantitatively increase the number of sources of color represented (see also Largey 2020). However, because source audits can be conducted separate from the journalistic process, they can often be seen as one-off projects rather than sustained efforts in a newsroom that could lead to lasting changes in sourcing practices (Wenzel 2021).

Newsrooms use different methods to conduct source audits. Wenzel describes how WHYY, a local NPR station based in Philadelphia, conducted a source audit that recorded “the backgrounds of voices heard during local programs over the course of three randomly constructed weeks over a three-month period” (Wenzel 2021, 466). In so doing, the news organization tracked race, gender, geographic location, and where known, the person’s organizational and political affiliation. In addition, they examined story themes and the role the source played in the story (e.g., doer/subject, explainer/analyst/expert, reactor/opinion/comment, affected, reporter, and host).

Third-party consulting firms, or academic researchers, are sometimes employed to conduct these analyses independently. Garcia McKinley and Green-Barber of Impact Architects, a consulting firm that provides source audit services for news organizations, have completed source audits for NPR-affiliate stations KUOW in Seattle and KQED in San Francisco, among other news organizations. They retrieve a sample of source records manually from a news outlet’s website. Then, the source records are coded based on demographic categories, using “visual cues, reporters’ and sources’ own words and descriptions, and online research to make judgments about each source’s characteristics” (Garcia McKinley and Green-Barber 2021). If an adequate judgment on a piece of demographic information can’t be made, there is an “unknown” category available.

KUT, the NPR affiliate station in Austin, Texas, performed a source audit on a three-month span of stories. The part-time consultant hired to perform the audit collected demographic information on sources by first contacting the reporters, and then reaching out to the sources themselves to fill in data that reporters could not answer (Largey 2018).

In other variations of audits, we found examples of news organizations that audit their own source diversity by surveying sources they’ve interviewed in their news coverage. For example, Wisconsin Public Radio conducted an email survey of their own sources interviewed for stories. This approach can result in low or systematically biased response rates, but the accuracy of collected data may be higher as sources themselves identify their own background characteristics (Haynes 2020). Such an approach does not

require extensive time or effort from the journalists themselves to collect these data, an advantage over other approaches, as we note in the section that follows.

Source auditing approaches are a somewhat common approach to collecting and analyzing source data. This is likely because it can be outsourced to third-party consultants, which frees up time for reporters and editors. It also does not require the use of complex technologies that are integrated with existing newsroom systems, such as CMS's. However, some practitioners think retroactive source audits are more time-consuming than other methods and provide less reliable data (Bauman 2021).

### **Real-Time Source Tracking**

Whereas source auditing is typically conducted well after news reports are published or broadcast, real-time source tracking refers to another umbrella of approaches that newsrooms sometimes use to track the diversity of their source networks. With this approach, source demographic data are gathered during the reporting process (often by reporters or producers themselves). These data are then entered into a larger database that is typically analyzed in aggregate after the reporting or publishing process is completed. Generally, the source demographic data aren't used to provide real-time feedback about the diversity of the sources quoted in stories as journalists are engaged in reporting and drafting stories; rather, sourcing data are often analyzed and presented in aggregate later (Scarpelli 2022). Wenzel (2021) finds that while real-time source tracking can encourage journalist reflexivity about sourcing practices, not all reporters follow-through on the tracking effort, limiting the effectiveness of these initiatives.

Real-time source tracking generally relies on the reporter to collect demographic data from their sources during the reporting process. Newsrooms may provide guidelines or a script for reporters to ask questions (see, e.g., Ramachandran 2021; Training Team 2021). Reporters offer an explanation to sources about why they are asking for this demographic information, and explain that offering this information is optional. Once reporters collect these data, they have to enter them into a system, either before or after story publication. Generally, news organizations use an amalgam of tools and do-it-yourself (DIY) systems to track their sources. These DIY systems often rely on existing tools like Google Forms, Microsoft Excel, or Airtable. Other news organizations have created ad hoc methods for tracking source characteristics in their CMS. For example, *Bloomberg* updated its publishing system in 2018 to allow editors to tag stories that featured women sources (Zelenko 2018).

A handful of newsrooms have begun to rely on alternatives to DIY systems, turning instead to off-the-shelf (OTS) systems for source tracking. The most well known of these OTS systems is Source Matters, created by the American Press Institute in 2021 and currently used by about 20 U.S. news organizations.<sup>3</sup> The system draws on RSS feeds pushed out by news organizations, systematically cataloging stories published and then automatically analyzing them using natural language processing methods to identify named sources. Once sources have been identified in each story, on a continuing basis, staff at the organization can login to the Source Matters system to update demographic and other categories for each source customized according to the specifications of partner news organizations.

Many newsrooms use comprehensive source tracking, where they aim to collect demographic information for all sources quoted in all articles (see, e.g., APM Research Lab 2022; Schachter 2024). While comprehensive source tracking can provide the most thorough account of source data, organizational commitment to this method can be low, resulting in missing data and systematic bias (Wenzel 2021). Other newsrooms have tracked demographic information for a sample of sources, tracking characteristics over discrete periods or for a random selection of stories (see, e.g., NPR n.d.; Woo n.d.).

### ***Automated Source Monitoring***

Automated source monitoring refers to approaches that use computational systems to automate the identification and categorization of sources in news content and impute demographic or other characteristics associated with them. We identified only a select few examples of such approaches currently in use, but as with other areas of journalism (Diakopoulos 2019; Simon 2024), emerging machine learning technologies may create more and more opportunities to automate these processes. When automated source monitoring tools are integrated into CMS's or other newsroom dashboards, they can provide real-time feedback during the reporting process in such a way that source demographic analysis can influence the reporting process before a story is published. In other words, reporters can use automated source monitoring to make changes to their sourcing during the reporting stage when stories are first filed.

While current technologies may have considerable limitations around identifying sources and their associated demographics, automated elements are increasingly being used in combination with both retrospective source auditing and real-time source tracking to make these approaches more efficient. In these hybrid approaches, automated tools are used to identify sources in copy and then newsroom staff are prompted to enter source characteristics such as demographics or other details. Integration with a news organization's CMS, allowing real-time feedback on source diversity, is less common. National Public Radio (NPR) offers a prominent example of this through its system named Dex, which integrates with the organization's in-house CMS (Fu 2021). Computer scientists are also actively developing tools for Wordpress (a CMS commonly used by news organizations) that will allow newsrooms to monitor source diversity using natural language processing (Shang et al. 2022; Vincent 2024). We expect in time more scholars, companies, and news organizations will create and adopt source tracking technologies as news organizations increasingly implement technologies such as artificial intelligence (AI) in their newsroom workflows (see, e.g., JournalismAI Collab 2021; Rinehart and Kung 2022).

### **Key Questions and Tradeoffs**

Having offered this typology of approaches to source diversity tracking, in this section we consider several questions that reveal tradeoffs that news organizations should consider when determining the most suitable approach for their newsrooms. These four questions are as follows: (a) What source characteristics can or should be tracked?; (b) How well integrated is the approach with existing newsroom workflows?; (c) Which is best for data reliability and handling missing data?; and (d) Which best facilitates "closing the loop"

within the newsroom, i.e., whether the sourcing data get used in ways that might influence actual sourcing practices?

### ***What Source Characteristics Can or Should be Tracked?***

News organizations must first consider which source characteristics they wish to track and whether these goals can be met with each of the three approaches. Some approaches are more flexible than others.

In our review, we found that most source diversity tracking efforts considered characteristics including gender, age, race, and geographic location, but some employed more detailed information. Some news organizations may track identification with other minority groups, such as LGBTQ+ communities or disabled communities. Newsrooms may also wish to track the role played by individual sources in stories (such as whether the source was quoted as an expert, elected official, exemplar of public opinion, or creative voice). Some outlets further track sourcing according to different types of story topics, reporting beats, or other editorial groups within their newsroom.

The type of source tracking approach influences the characteristics that can be tracked and the flexibility around changing these characteristics. For example, with retroactive source audits, collecting certain source data after-the-fact can be limiting. Variables like age, geographic location, or employment may change between when content is published and source audits are conducted. Some sourcing characteristics may also be less visible or evident to whomever is conducting the audit. Since real-time source tracking and automated source monitoring require reporters to collect and record sourcing data earlier in the reporting process, this information may therefore be more easily accessed. On the other hand, source audits allow newsrooms to be more expansive in what data can be tracked since this approach does not require categories to be pre-determined. Meanwhile, real-time source tracking relies on reporters collecting sourcing data most often during the interview process or shortly thereafter. Data collection is therefore limited to whatever characteristics newsrooms deem important at the time. Alternatively, the specific identity characteristics that can be tracked with fully automated source monitoring approaches are limited. While existing tools may be able to predict gender, age, and some race and ethnic categories, they do so with considerable error and may not be able to discern nuances like how sources were used in stories.

### ***How Well Integrated is the Approach with Existing Newsroom Workflows?***

In addition to questions about what source characteristics can or should be tracked, weighing between approaches also involves assessing how seamlessly they can be integrated into existing newsroom workflows. Greater integration may create more opportunities for newsroom staff to reflect on gaps between their actual sourcing and their ideas of what constitutes source diversity, but poorly integrated approaches may also lead to low quality data, threatening the value of the entire initiative.

Approaches to tracking vary in how much they require journalists themselves to attend to the patterns that emerge from their own sourcing data. In source auditing, that attention comes in bursts following a retrospective study, which may be conducted entirely external to the organization, likely causing little disruption to daily routines. In real-

time source tracking, journalists may be asked to incorporate new practices to their regular workflows involving data collection about source demographics or other background information. While many questions journalists already ask sources are relevant to source tracking (such as age, job title, etc.), some questions may be new and uncomfortable for reporters to ask (such as disability status). Reporters may also chafe at being asked to take on more tasks on an ever-expanding list associated with their jobs in the digital age (see, e.g., Cohen 2019; Vos, Thomas, and Tandoc 2023).

Time consuming or cumbersome data entry, whether news organizations use DIY or OTS systems, is another concern. Technological integration of source tracking programs can be helpful here. For example, where automated source monitoring is fully integrated into a news organization's CMS, these approaches may be more efficient than retroactive source audits or real-time source tracking requiring the use of systems outside the CMS. Relying on external systems may present obstacles to collecting comprehensive and unbiased data since these systems often require journalists to take additional steps to enter data.<sup>4</sup>

In the future, growing use of AI tools in newsrooms could lead to more automation for source tracking and source audits. In a 2022 report, the *Associated Press* highlighted source audits and source diversity tracking as areas where AI could assist local newsrooms in particular (Rinehart and Kung 2022).

### ***Which is Best for Data Reliability & Handling Missing Data?***

If news organizations seek to make editorial decisions based on sourcing data tracked through these efforts, they must also consider carefully the reliability of the data they are collecting and factors that could lead to systematic bias. The different types of source tracking approaches vary in this respect.

Retroactive source audits, while sometimes more constrained in what characteristics can be examined, can offer a more comprehensive picture of the quantity of quoted sources, since this approach counts sources (often manually) after stories are published. On the other hand, this approach can lead to large amounts of missing or inaccurate data where reporters may no longer have source information readily available, especially if it involves sensitive information not asked during the interview itself. Where source auditors rely on visual cues or online research to identify source characteristics, this information may not always be accurate. In other cases, staff turnover may make retroactive efforts to audit sources that much more challenging. Directly surveying sources retroactively could be one way of overcoming these problems, but rates of survey nonresponse are likely to be higher with certain types of sources than others in ways correlated with relevant underlying source characteristics (such as socioeconomic status).

Systematic missing data is also one of the most pernicious challenges in real-time source tracking. DIY systems that rely on staff to regularly enter their own sourcing information do not provide a clear estimate of what proportion of stories (and sources) are tracked versus not tracked, which makes it difficult to assess whether changes in diversity of sourcing are due to actual changes in editorial practices or changes in individual reporters' participation in the initiative and diligence in consistently entering sourcing data. Apparent progress toward meeting diversity metrics could be an artifact of systematic differences in newsroom compliance. Those who are most committed to diversifying

their own sourcing may also be the most likely to enter sourcing data over time. OTS systems like Source Matters, which provides a more consistent estimate of the denominator of all sources in a given RSS feed, offer an improvement here by tracking which stories are and are not tracked under which bylines.<sup>5</sup> However, the quality of these data still depends on ongoing newsroom compliance to enter source characteristics and do so in a sustained way over time.

Automated source monitoring solves some of these problems by consistently identifying sources across all stories in a given CMS, allowing newsrooms to get a holistic sense of what source data they are tracking—and what source data they aren't. But where these automated source monitoring approaches still sometimes (or often) rely on staff to manually enter source characteristics into tracking systems, they are subject to the same limitations as real-time source tracking.

### ***Which Best Facilitates “Closing the Loop” Within Newsrooms?***

Efforts to track source diversity require significant newsroom resources, so news organizations often desire to make these source data actionable. That occurs through source data analysis, reporting, and internal newsroom dialogue about what these data are showing. Each of the three approaches to source diversity tracking hold different implications for this “closing the loop” process.

A first step to making the source data actionable is to aggregate and analyze the data. The different approaches to source tracking allow different affordances in (a) when in the news production process data can be analyzed, (b) how automated or manual the data analysis is, and (c) what types of analysis can occur. Both retroactive source auditing and real-time source tracking involve analysis some time after publication. There is also variation in both of these approaches to how automated or customizable these forms of analysis may be, depending on whether news organizations are working with internal teams, external consultants, or OTS systems. With automated source monitoring, on the other hand, analysis occurs during the reporting process itself with more instantaneous feedback provided in the CMS, but in ways constrained by the technological tools being used.

Once data are analyzed, newsrooms must consider how they integrate their source diversity findings back into their reporting process. Here again, automated systems facilitate more responsive and regular feedback, whereas manual analysis of source data, perhaps more customizable to news organizations' needs, may only capture a momentary snapshot of sourcing at a given point in time.

## **Discussion**

In theory, source tracking will invite newsroom staff to pay attention to whose voices are missing from their current sourcing practices, and how disparities in who gets quoted or featured in stories persist over time. However, decisions newsrooms make about their approach to source tracking have implications for whether these approaches succeed in prompting journalists to reflect on and take action around pernicious biases. Our review of these three types of approaches demonstrate important trade-offs in terms of what types of source characteristics are tracked, how reliable and unbiased sourcing

data actually are, and how findings from these efforts get analyzed and internally reported back to the newsroom. Different forms of source tracking, therefore, may be more or less successful in prompting newsrooms to interrogate their sourcing decisions and routines, and therefore whether newsrooms make actual progress in diversifying the range of voices that appear in their coverage.

For journalists to reflect on their sourcing biases, which often result from routine practices (Wheatley 2020), having accurate data on what sources are actually quoted is critical. Reporters and editors may have distinct ideas in their heads about what makes a “good” source, which may or may not align with their apparent tendencies toward quoting officials and elite experts (Gans 1979; Sigal 1973; Tuchman 1972). Different journalists may also hold varying conceptualizations of what source diversity should look like and what factors should be considered, such as demographic background, job title, or political viewpoint (Martindale 2006). Additionally, an overreliance on official, expert, and routine sources—a prevailing trend in journalism—may lead to the same sources being quoted repeatedly and a lack of gender and racial diversity (Reese, Grant, and Danielian 1994; Searles et al. 2023). Different conceptualizations of what diversity in sourcing should look like and an understanding of sourcing habits from a quantitative perspective can enable news organizations to critically evaluate their source usage and the type of journalism they produce. It can also help news organizations consider how sources are used in their stories: If sources serve as the “primary definers” competing for news access, source tracking can help news organizations reflect on their own ideological role in maintaining structures of power (Hall et al. 1978; Schlesinger 1990). As such, news organizations like WHY? that track the role of the source in the story, or that simply offer an elite vs. non-elite differentiation (as done by Reich 2009), may be better equipped to consider how they uphold power systems. Newsrooms may be more willing to interrogate their institutional role given recent questioning of the role of objectivity in journalistic practice (Schmidt 2024), although some individual journalists may still push back on sourcing goals that require adherence to source characteristics like race and gender (Wenzel 2021), which may have their own drawbacks. Journalists may be concerned about reductive tokenism through quantitative categorization (The Open Notebook n.d.; Wenzel 2021, 467). Additionally, while source tracking approaches do allow newsrooms to track the role of the source, these initiatives don’t adequately track agenda-setting or framing of the larger stories.

There are, however, important nuances that must be considered when implementing source tracking efforts. These involve, among other things, taking into consideration which system is most likely to produce the highest quality data, particularly when the approach depends upon already overburdened staff to enter accurate and detailed data. Likewise, interpreting sourcing data may also depend on how sources appear in stories, the topics of those stories, and whether the same sources are being quoted over and over again. This level of granularity may be most possible with real-time tracking efforts and least likely with automated monitoring. In other words, our review helps underscore the importance for news organizations to thoughtfully consider which characteristics they would like to track, why they aim to do so, and whether how they have sought to do so is likely to change what they are able to discern about their own sourcing patterns.

News organizations need to also consider how data will be handled in a way that maintains source privacy and promotes trust with sources. Non-elite sources can be hesitant to

speak to the press because of the risk: Palmer (2018), for example, finds people fear that participating in a story “would have negative repercussions on their goals, their reputations, or their daily lives” (40). It is reasonable to think this fear may be compounded if a potential source knows that sensitive demographic data will also be collected. Reich introduces a novel methodology to assessing journalists’ sourcing patterns through what he calls “reconstructivist interviews,” a process where the researcher randomly selects news stories from a body of journalists’ work over a finite period of time, and interviews the journalists in such a way to maintain source anonymity (Reich 2009). News organizations may wish to consider similar systems in which they can keep source data protected and anonymous. Additionally, newsrooms may wish to seek legal advice around what source data they can collect, and how that source data is linked to identifying information, if at all (The Open Notebook n.d.). In sum, while individual reporters may be familiar with protecting source data, any institutional source tracking initiative ought to consider the ethics, legality, and data privacy concerns of collecting source data. So too should they consider how collecting this data in the first place could impact trust with the very sources journalists rely on.

We note that there exists some more fundamental underlying questions about institutional aims that we have not addressed here. Do news organizations seek to track only those characteristics that are most visible and evident to audiences about their sourcing in order to ensure that the public sees diversity in their coverage that reflects their own communities? Or do news organizations seek to track diversity in sourcing for the sake of improving the content of the underlying journalism regardless of what characteristics may be evident in the final published content? For example, newsrooms may track the race of sources in written stories, but unless explicitly mentioned or photographed, audiences may never be aware of the racial background of most sources. This consideration also changes based on medium: Characteristics like race, gender, and age may be more visible on television than in print. When newsrooms consider what characteristics to track and their motivations for doing so, they may wish to consider whether source diversity is apparent to the audience—or whether that distinction is important as a primary motivation for the initiative itself.

Likewise, the different approaches also hold implications for whether newsrooms are likely to respond to internal feedback on their own sourcing routines. Some newsrooms may need to develop more built-in structures and times for journalists to reflect on their own sourcing practices and put resources toward expanding their source networks (see Wenzel 2021). How regularly journalists engage with source data analysis will likely impact journalists’ levels of reflection. Organizational commitment is needed to pursue this work. Prior research does not offer clear evidence around whether embedding real-time feedback into everyday journalistic workflows or taking moments outside of those workflows for periodic internal reporting on sourcing patterns is more or less likely to prompt journalists to reflect on and improve the diversity of their own sourcing routines. While Bauman (2021), a deputy managing editor at *Chalkbeat*, finds that automation does not decrease reporter investment in diversifying sources, Wenzel (2021) alludes to the fact that at one public media organization, more hands-on work by reporters could lead to greater investment in diversifying sources. In addition to organizational commitment, buy-in from journalists themselves is essential for news organizations pursuing source tracking if the goal is for these systems to impact sourcing practices.

Overcoming journalistic resistance will mean news organizations need to respond to journalists' concerns about additional workload.

We urge researchers to take up this and other questions related to source tracking in future studies. In particular, we see a need for additional research that considers the perspectives of journalists tasked with implementing and managing these approaches—especially case studies evaluating each of the three approaches in practice—as well as more audience-centric studies that examine how the public responds to source diversity tracking efforts. News organizations sometimes assume such efforts will lead to increases in trust and there is evidence to suggest it might (Arguedas et al. 2023), but we do not know whether such responses are likely to be uniform across the public or to what extent we can reasonably expect audiences to notice changes in sourcing patterns.

## Conclusion

At a moment in which growing numbers of newsrooms are sinking significant resources into tracking the backgrounds and demographics of their sources, we argue that news organizations must carefully weigh the trade-offs around differing approaches to implementing these efforts. In this study, we identified three common approaches news organizations use to track diversity among sources and highlighted key questions associated with the approaches. We also elevated broader considerations for journalists and scholars to evaluate as source tracking is increasingly tied to DEI efforts. In line with Wenzel (2023), we believe news organizations ought to consider source tracking as part of a larger strategy to examine biases in sourcing and coverage. Newsrooms need to interrogate the underlying goals of source tracking and may need to consider complementary initiatives to reach those outcomes, since source tracking in and of itself is unlikely to change journalists' sourcing practices. By offering a typology for studying source diversity tracking, this study makes an important contribution to future scholarship on these subjects, and we hope it will inspire future research in this emergent area of journalism practice.

## Notes

1. DEI, often used in the context of organizational management and higher education, is defined as “an initiative that promotes a culture in which, within a given context, each person is valued and given equal opportunities to thrive” where diversity refers to “the variability in individuals' characteristics,” equity being the different ways certain people face barriers while others do not, and inclusion referencing how much different individuals feel comfortable in a given environment (Feitosa et al. 2022, 437).
2. <https://sourcematters.com/about-us/>
3. As of October 2023.
4. Another level of integration to consider is how the source data can be archived and used for additional purposes. Certain DIY source auditing systems double as source rolodexes, allowing reporters to search them and get contact information.
5. Source Matters uses natural language processing to identify sources, which captures most but not all sources named in stories. While the process leads to some false positives that must be manually excluded and some omissions that must be manually entered, neither tendency should be expected to vary systematically over time, allowing for more robust analysis of changes in source diversity.

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## ORCID

Cydney Grannan  <http://orcid.org/0009-0004-2907-9610>

Benjamin Toff  <http://orcid.org/0000-0001-7201-4389>

Kathleen Searles  <http://orcid.org/0000-0001-8145-9582>

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