Intro

Network television news was once the most trusted source of information in America. It also had a monopoly over pictures and television reporting from across the country and around the world.

Neither of these things is true anymore.

Network news in 2004 is an industry trying to find its place in the changed world of 21st-century journalism. It is also an industry on the brink of generational change, with the retirement of its most visible symbols, the current nightly network anchors, beginning with the stepping down of NBC’s Tom Brokaw at NBC later this year.

What place does covering the major events of the day or acting like an important public institution play in a network’s identity in the age of a hundred-plus channels? How important is news at all?

A detailed look at the content of network news reveals that the evening newscasts are still network television’s front page, and by traditional standards still home to its most serious journalism. Nearly 30 million people still watch the nightly news, and the programs remain profitable.

But the trend line is ominous. Evening news ratings have dropped 59 per cent since their peak three decades ago. And the audience is aging - nearly 60 years old on average, while the average age of Americans is 35. The economics of evening newscasts is headed in a troubling direction.

The picture for network morning news is quite different. Its audience is stable and even grew in 2003. Morning news shows, which have half the audience of nightly news programs, also enjoy twice the revenue as their evening counterparts, according to available data. Yet the content in the morning is softer. People who get their news from morning programs know a very different world - one that is less global and more oriented around entertainment, celebrity and true crime - than those who get their news from newspapers or evening news.

What the networks believe they can afford to offer the public also has changed. Available numbers suggest that the news divisions have fewer correspondents and off-air journalists to produce the news than they once did, and fewer bureaus or listening posts here and abroad. Foreign bureaus have been cut by more than half. At the same time, the newsgathering technology has become more sophisticated, the editing capabilities and satellite reach more vast and instantaneous.

The net effect, many network journalists say, is the news at all three organizations tends to be focused on the major stories that have to be covered, leavened with features or sidebars routinely chosen for
their appeal to targeted demographic groups. Privately, network veterans say the unexpected is less common. So is the original. There is more homogenization. Large portions of the domestic news agenda, such as the environment, science, prisons and the poor, content analyses suggest, are often absent. Other topics of special interest to targeted demographic groups, such as healthcare, retirement and financial markets, are emphasized.

Overall, more people now say they turn to cable television for major breaking news events than say they turn to network or local broadcast news. The reason appears to be convenience and availability. We live in an on-demand world. Yet on those occasions when network television news goes head to head with cable, such as with morning news shows, network still tends to attract more audience.

What does all this suggest about the future of the network news divisions?

The answer probably depends on how the parent companies that own the networks perceive news as adding value to their franchise. Do they believe that news has an intangible value that transcends the immediate bottom line - that a news department's reputation for quality and commitment to the public interest enhances a network's brand, thereby strengthening its entertainment programming, its local affiliates, its other media endeavors? Or do they see news mostly as commodity, which justifies itself in quarterly and measurable terms in return on investment. Both are justifiable views. But they lead to different strategic visions and different levels of investment.

The journalists at the networks still address a mass audience that surpasses any other medium. They still possess an institutional memory for news delivery that rivals journalists elsewhere. However, the decline of the television networks as a medium means that these advantages of scale and history are dwindling year after year, although they have not yet been dissipated.

Most likely the future will be determined by the degree to which the news divisions' owners have the imagination and the will to create new business models that employ both traditional and emerging technologies, target both old and new audiences, expand to more channels of transmission and generate new revenue streams. If they do, they can add value to their conglomerate parents, providing diversified news for their entire media franchise in broadcast, cable, Internet and beyond, just as they did for the stand-alone networks in the last century. If they do not, they will probably wander down the path of contraction they have followed over the past two decades.

**Content Analysis**

What are Americans now getting from network news?

In recent years, five major trends have dominated the broadcast news divisions: shrinking audience, intensifying budget constraints, competition from 24-hour cable news, the fast growth and then decline of prime time news magazines, and the increased influence within news divisions of morning programs.

It seems logical to ask what impact they are having on what viewers see. Have the nightly newscasts retreated from their traditional role of resembling, in effect, the front-page of the daily newspaper, in favor of becoming more infotainment-oriented? Have the journalistic styles of the nightly newscasts and the morning programs converged to the extent that the first hour of the morning programs is now an alternative source for the same type of news? Has PBS's "NewsHour" managed to stake out a separate journalistic terrain in which it not only covers stories differently but also covers altogether different stories than the three network news programs?
To get answers, this study conducted a content analysis of all three network evening and morning newscasts, as well as the "NewsHour" on PBS. The study encompassed a month of weekday newscasts (20 days), selected to include four of each weekday (see Methodology), 110 hours of news programming, an examination of nearly 2,000 separate stories. Earlier studies have offered some sense of the news agenda of prime time television news magazines.

The quick answers:

- Having experimented with tabloid, sensation, lifestyle and celebrity during the mid-1990s, nightly network newscasts have become more traditional, some might say serious, in their topic agenda since September 11. It is an oversimplification, however, to suggest they have returned to the news agenda of 15 years ago.

- However they have evolved, nightly newscasts remain quite distinct from morning newscasts or cable--more likely to cover the major news of the day and to do so with stories that are carefully written and edited, and more densely sourced than elsewhere on television.

- People who get their news from network morning shows, on the other hand, are seeing a world more focused around true crime, entertainment, lifestyle, and, when they are covered, the human interest angle on government and foreign affairs.

- The "NewsHour" resembles morning news in its interview-heavy format as well as the nightly news in its public policy content. But it has adopted a focus on government and foreign affairs that is even heavier than the front pages of most newspapers.

**The Three Commercial Nightly Newscasts**

The best evidence suggests there is something of a U-curve to the nightly news agenda over the last 20 years. Looking at studies from different researchers, there was a steady move after the Cold War toward subjects like entertainment, lifestyle and celebrity crimes, and away from subjects such as international events and public policy debates. That move toward a lighter agenda began to ease in the late 1990s and the news agenda has become even more serious again after September 11.

The Project for Excellence in Journalism (PEJ) has tracked the news agenda -- the topics of stories -- on network nightly news off and on for 26 years. The Tyndall Report, using slightly different methodology, has tracked time devoted to different topics on network news every weeknight for 16 years. The Center for Media and Public Affairs, whose president is Robert Lichter, has published tracking of topics by story on network news every night (weekday and weekend) going back to 1990 using a methodology similar to that of the PEJ. All three approaches concur in revealing this gradual shifting of the news agenda on nightly news.

The methodology of the Tyndall Report, whose publisher is Andrew Tyndall, counts specific story themes but not broader topic categories. The report shows that coverage of U.S. foreign policy has returned to levels found at the end of the Cold War, although coverage of international affairs not related to the U.S. has not. But Tyndall also notes that the war in Iraq is a singular event that makes projections into the future uncertain. The PEJ's more episodic measurements of the full topic agenda of nightly newscasts, reinforces Tyndall's findings about international coverage. It also finds, though, that the agenda is still less oriented to government and public policy than in the 1970's and 80's. Government coverage had declined to just 5% in 2001 and 2002, down from 32% in 1987. In the 2003 study, government topics climbed back to 16% of all stories, though still just half of where it was in
If coverage of foreign affairs and government were up, what was down? Generally crime and more lifestyle and entertainment-oriented news topics. Stories were half as likely to be about crime in 2003 than they were in 2002 (6 percent in 2003 versus 12 percent in 2002.) Entertainment and lifestyle coverage dropped to just 8 percent of stories; these topics had come to make up nearly 20 percent of stories studied in 2001. They declined after September 11 and rose back to 19 percent of stories in the first six months of 2002.

Science coverage appears to have declined somewhat over the last two years (to 2 percent of stories).

Almost certainly one reason for the more traditional agenda on nightly news is the foreign policy of the current administration. Given the Bush administration's decision to go to war in Afghanistan and Iraq, the networks have had little choice but to have government, military or foreign policy dominate their story selection, irrespective of cost.

Yet one interesting thing about the 2003 war in Iraq and the Gulf War 12 years ago, Tyndall says, is that the usual patterns of overseas coverage were not followed. Increased U.S. foreign policy coverage normally has the effect of increased international coverage unrelated to U.S. foreign policy as reporters try to put U.S. actions in a global context. That tended to happen during the Cold War, when coverage of the internal affairs of the Soviet Union and Eastern Europe increased. It also happened immediately after the September 11 attacks, but it did not continue in 2003.

Tyndall also suggests words like hard and soft news may be misleading in describing the shift. In the 1970s, he reminds us, Walter Cronkite, who was then the CBS anchor, would often close with a four-or-five-minute human-interest piece by Charles Kuralt "On the Road." Tyndall suggests that in the 1990s the networks added an array of family and lifestyle topics, covering such things as childrearing, sexuality, reproduction, tobacco, nutrition, obesity, eldercare and early education. He says that demographic calculations to target more women go into the decisions to cover these topics. But he suggests that it is unfair to consider these necessarily less serious issues.

While the domestic agenda has broadened and become a larger part of network news over the years, some topics are notably absent in the composite month of newscasts studied in 2003. The environment, for instance, made up just 1 percent of the stories on nightly news. The same was true of education, transportation and religion. Technology made up even less. Coverage of the healthcare system in the country made up 3 percent of the stories. By contrast, accidents and disasters (excluding weather) made up 6 percent of the stories on the nightly news.

### Nightly News Topics Over Time

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</thead>
<tbody>
<tr>
<td>Government</td>
<td>37%</td>
<td>32%</td>
<td>18%</td>
<td>5%</td>
<td>7%</td>
<td>5%</td>
<td>16%</td>
</tr>
<tr>
<td>Foreign/Military</td>
<td>21%</td>
<td>19%</td>
<td>15%</td>
<td>17%</td>
<td>10%</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Defense</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
<td>6%</td>
<td>29%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>Domestic</td>
<td>8%</td>
<td>7%</td>
<td>5%</td>
<td>18%</td>
<td>34%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Crime</td>
<td>8%</td>
<td>7%</td>
<td>13%</td>
<td>12%</td>
<td>4%</td>
<td>12%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Business 6 11 7 14 5 11 12
Celebrity/Enter. 2 3 8 5 0 2 2
Lifestyle 4 11 14 13 1 17 6
Science 4 5 6 4 11 2 2
Accidents/Disasters 9 5 10 4 0 3 10
Other N.A. N.A. N.A. 3 0 N.A. 2

*Totals may not equal 100 due to rounding.

Looked at another way, if you watched a commercial nightly newscast every weeknight for a month - some 10 hours of programming - you would have seen:

- Less than a minute about culture and the arts
- Less than a minute on family and parenting
- About four minutes on the environment
- Less than five minutes about transportation
- Slightly less than seven minutes about education
- About 14 minutes on healthcare
- About 16 minutes of crime
- About 22 minutes on accidents and disasters
- About 74 minutes on government matters
- About 97 minutes on foreign affairs

How does this news agenda compare to Page A-1 of America's newspapers?

The three network nightly newscasts remain the closest thing one can find to it on commercial television. While newspaper front pages are slightly more oriented to government and slightly less oriented to foreign affairs and the war, in the main they are quite similar. Neither focused heavily on crime, and both avoided celebrity and lifestyle coverage.

**Topics in the News: Newspapers vs. Nightly News, 2003**
Percent of All Stories

|                  | Newspapers (Page A1 only) | Commercial Nightly News | PBS "Newshour"
|------------------|---------------------------|-------------------------|----------------
| Government       | 16%                       | 26%                     | 24%           
| Foreign/Military | 25                        | 18                      | 39            
| Defense          | 3                         | 3                       | *             

http://www.stateofthemedia.org/printable_networktv_total.a...
The commercial nightly news was more likely to focus on always-graphic disasters (10 percent versus 4 percent of newspaper front pages). They were also twice as likely to carry business stories, though a portion of that is the nightly recitation of the advance or decline of the Dow Jones Industrial Average, and newspapers normally have a separate section devoted exclusively to business.

The "NewsHour" on the noncommercial PBS is closer to newspaper front pages in its orientation toward government. And, it focused more on foreign affairs than either newspaper front pages or commercial nightly news. Fully 63 percent of "NewsHour" stories studied were government and foreign affairs. The program, in turn, carried less other kinds of domestic news, including crime.

**Morning News vs. Evening News Agenda**

If nightly news is still the place where viewers can get the most comprehensive sense of the day's events, morning news programs have become clearly more important to network news divisions (see Audience and Economics). They have held onto more of their audience and become more important economically to network fortunes.

What are Americans getting in the morning, and how does it compare to evening news? Here we can compare how nightly and morning news allocate their total time for news (rather than just story counts).

The morning news format is suited to flexibility. The programs will transform themselves into covering major breaking news in times of crisis. They revert back to a softer mix in more normal times. Recent times have seen a series of crises.

Yet even during major events, network morning programs offer a markedly different and softer news agenda than nightly news. The two types of newscasts, in other words, are hardly substitutes for each other. And that is not just a matter of approach, where the morning programs emphasize live interviews by the anchors and the evening programs feature edited pieces taped by correspondents.

Compared with the total time on nightly newscasts, the morning news programs:

- Are much more focused on crime (19 percent vs. 5 percent)
- Spend much less time on affairs of government (8 percent vs. 17 percent)
Spend half as much time on foreign events (13 percent vs. 26 percent)

Spend vastly more time on celebrities (14 percent vs. 2 percent)

Spend twice as much time on lifestyle news (15 percent vs. 7 percent)

And these differences are just looking at the first hour of morning news - the more hard-news-oriented hour. If the second hour (and the third in the case of the "Today" show on NBC) had been sampled as well, the differences would have almost certainly been even more pronounced.

Given that morning news ratings are stable or rising, while evening is shrinking, this has significant implications. Those who get their television news in the morning are learning about a different agenda of what matters and are far more likely to talk about the trial in the murder of Laci Peterson, Michael Jackson's child-molestation case or Tom Cruise's movie, even in the supposedly hard-news hour of the morning, than those who get their news in the evening. When they discuss the war in Iraq around the water cooler, it is personalized as human interest in Jessica Lynch rather than issues such as compliance with Security Council resolutions. It is a world where the economy is covered as household finance tips; where science is covered as innovations in personal health or consumer electronics; and where environmental stories such as global warming are covered as the latest weather disaster.

**Topics in Network News, 2003**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Network Morning</th>
<th>Network Nightly Comm.</th>
<th>PBS Newshour</th>
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<tbody>
<tr>
<td>Government</td>
<td>8%</td>
<td>17%</td>
<td>33%</td>
</tr>
<tr>
<td>Foreign/Military</td>
<td>13</td>
<td>26</td>
<td>32</td>
</tr>
<tr>
<td>Defense</td>
<td>5</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Domestic</td>
<td>11</td>
<td>18</td>
<td>13</td>
</tr>
<tr>
<td>Crime</td>
<td>19</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Business</td>
<td>1</td>
<td>9</td>
<td>5</td>
</tr>
<tr>
<td>Celebrity/Enter.</td>
<td>14</td>
<td>2</td>
<td>*</td>
</tr>
<tr>
<td>Lifestyle</td>
<td>15</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>Science</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Accidents/Disasters</td>
<td>9</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>2</td>
<td>3</td>
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*Totals may not equal 100 due to rounding.

On the other hand, it might be a mistake to imagine that these programs gained in ratings in 2003 because of a lighter news agenda. Indeed, some evidence suggests the morning news programs have moved more in the direction of traditional news about government and foreign affairs lately, thanks, perhaps, to several major events.
Research by the Tyndall Report finds that the 2000 Florida recount represented one such moment. Viewers waking up wanted to know who the next President was, and ratings rose. Eight months later, however, a study of one month of morning show content by the Project for Excellence in Journalism in 2001 saw little in the way of substantive coverage of major news events. That changed after September 11, when coverage became more serious again. Yet that, too, did not last. A PEJ study of the first six months of 2002 found a return to softer topics, though not as far back as in the summer of 2001.

In 2003, the content analysis finds, the war in Iraq represented another spike in coverage of major events in the morning television news and a move toward a more serious agenda.

In June 2001, for instance, only 4 percent of morning stories pertained to government, defense or foreign affairs. In the first half of 2002, that had risen to 14 percent of stories. In 2003, that had doubled again to 29 percent.

**Morning News Topics Over Time**

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<tr>
<td>Government</td>
<td>1%</td>
<td>5%</td>
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<td>8%</td>
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<tr>
<td>Foreign/Military</td>
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<td>Defense</td>
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<tr>
<td>Domestic</td>
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<td>Crime</td>
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<td>Business</td>
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<td>Celebrity/Enter.</td>
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<td>Lifestyle</td>
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<td>Science</td>
<td>5</td>
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<td>2</td>
</tr>
<tr>
<td>Accidents/Disasters</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>11</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
<td>0</td>
<td>N.A.</td>
<td>3</td>
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* Totals may not equal 100 due to rounding.

While celebrity and lifestyle make up a large percentage of morning news, that percentage is apparently down, from 70 percent of all stories in June 2001 and 58 percent in 2002 to 25 percent in 2003.

Still, to the extent that morning news is becoming the key newscast in any news division, this has significant implications in terms of the values of the news division, the expertise of its reporters and producers, and the knowledge and brand that it provides to the American public. Their prominence and popularity represent a change in the mission of the network news divisions to an emphasis of less serious policy-oriented fare. The fact that these divisions’ resources, promotional efforts, star anchors and profits are focused more than they were 15 years ago on the morning programs, and less on their
evening newscasts, demonstrates a shift in the center of gravity of their news values.

The Lehrer News Menu

If the nightly news has become somewhat less important, and the morning programs more important, to what extent has that created a larger niche for public broadcasting's "NewsHour" with Jim Lehrer? The Lehrer show by reputation certainly would be positioned as the most traditional, the most hard-news oriented, the most likely to report in depth on issues that others in television might shun. Is that borne out in the content analysis? Does the "NewsHour" cover a different agenda of topics?

The content study suggests that in some ways, Lehrer is indeed staking out a distinct journalistic terrain for itself, perhaps one carefully tailored to a PBS audience. With an hour-long newscast and feature interviews, it takes on more of the format of the morning shows. At the same time, though, its news agenda is more in line with the evening news: a commitment to foreign policy and government, and a disdain for entertainment, celebrity and pop culture - only more so. The "NewsHour" spends even less time than evening news on crime, accidents and disasters.

The program's coverage of government and domestic issues, however, may be influenced by other considerations as well. For one, focusing on interviews with government newsmakers is an inexpensive way to do news, particularly for a broadcast based in Washington.

Beyond the question of topics, there are a host of other differences in the content of evening, morning and noncommercial news.

News Content Versus Ads and Teases

These differences begin with how much news content one gets inside each of these programs. For 30 minutes of programming, we examined the average number of news minutes versus advertisements and promotional announcements.

The nightly newscasts used to be described as 22 minutes of news in a 30-minute program. That is no longer the case. In the month of programs studied, the amount of news on the three commercial nightly newscasts, after teases, promotional announcements and commercials were removed, was closer to 18 minutes 48 seconds. This varied, somewhat noticeably, by network. NBC's "Nightly News" had significantly more news content (an average of 19 minutes 45 seconds) than either ABC's "World News Tonight" (18 minutes 30 seconds) or CBS's "Evening News" (18 minutes 56 seconds).

The evening network news nevertheless had more content time than the morning news programs. In the mornings, only 15 minutes 6 seconds of every half-hour is content (based on the first hour of programming), once the commercials, promotional announcements and teases, and local news inserts are removed.

NBC's news program again came out on top. In the New York market, where our sample of morning shows was videotaped, the local NBC station averaged 16 minutes 21 seconds per half-hour. The CBS station was second with 14 minutes 54 seconds and ABC was third with 14 minutes 6 seconds.

While local news inserts were not analyzed in this study, they are certainly an important part of the content for morning news shows. According to research by Andrew Tyndall, in the second quarter of 2003 the local New York stations averaged the following amount of time for local news: WABC averaged 6 minutes in the first hour, WCBS 5 averaged minutes 42 seconds, and WNBC averaged 3 minutes 6 seconds.
The "NewsHour" is "commercial-free," of course, although it still contains teases of what is to come on the program and funding credits and the beginning and end of the program. Still, once those are taken out, there is a good deal more news packed in. In 30 minutes of the "NewsHour," 26 minutes were news content, more than 7 minutes more than on the commercial networks' nightly news and 11 minutes more than on the network morning programs.

**Nightly News Beyond Topic**

Beyond time, what is the structure of the three commercial nightly newscasts in 2004?

They remain the showcase for the work of correspondents, their editors and producers. That is because these programs are made up largely of taped, edited packages. By comparison, the "NewsHour" and the morning programs, with their emphasis on extended interviews, are an anchor's medium.

Almost the entire news hole on the three commercial nightly newscasts is devoted to edited packages (84 percent of the time on these programs versus the "NewsHour's" 31 percent and the morning programs' 36 percent).^{5}

The three networks average 6.8 such packages each evening, at an average length of 138 seconds, including the anchor's introduction.

**Story Origination on Evening News**

<table>
<thead>
<tr>
<th>Percent of All Time</th>
<th>Commercial</th>
<th>&quot;NewsHour&quot;</th>
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<tbody>
<tr>
<td>Packages</td>
<td>84%</td>
<td>31%</td>
</tr>
<tr>
<td>External Interviews</td>
<td>1</td>
<td>56</td>
</tr>
<tr>
<td>Correspondent Interviews</td>
<td>1</td>
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<tr>
<td>Stand-ups</td>
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<td>Anchor Reads</td>
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<tr>
<td>External Sources</td>
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<td>Banter</td>
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*Totals may not equal 100 due to rounding.

**Sourcing on Nightly News**

This reliance on taped packages and correspondents has consequences beyond style. The time involved in writing, editing and checking a story translates into more time to verify facts and more sources than can be found in other story forms, including live interviews. The power to check and to edit is important.

This is quantifiable in the sourcing measurements.

Unlike the live stand-ups, which are the staple format for cable news correspondents, these taped packages are more comprehensively sourced, with named and identified institutions and individuals,
often in the form of direct quotations, soundbites from people whose inflection, mood, tone and sincerity viewers can assess directly.

To isolate this, the study examined how many sources a story cited, and whether those sources were named and their level of expertise and potential biases were described so that audiences could determine more for themselves how to evaluate the information.

The less transparency there was, the more audiences would have to accept the word of the news program that these sources were believable. At the bottom of the sourcing scale would be a story based on a lone anonymous source. At the top would be a story with at least four named and fully described sources.

Overall, the three commercial nightly newscasts had higher levels of sourcing on average than did other kinds of news programs. Nearly half of all stories (48 percent) had two or more fully named and described sources, and 18 percent cited four or more of these sources.

What about anonymous sourcing? Overall, less than a third (29%) of nightly news stories contained anonymous sources. Usually the networks made some attempt to describe these anonymous sources so that viewers could have some basis to judge their credibility. Only 14 percent of the stories had at least one anonymous source without any explanation of why the source was credible, such as "CBS has learned" or "sources tell ABC."

**Story Length**

For all that people complain about brevity on television news, network nightly newscasts tended to rely either on fairly long stories by modern standards or very short ones.

About half of all stories on the three commercial nightly newscasts, 52 percent, were more than 90 seconds while 42 percent were less than 40 seconds. Very few stories, just 6 percent, fell anywhere in between (41 seconds to 90 seconds), the type of truncated package that is a staple of some local television newscasts. The biggest difference between the commercial network news and the "NewsHour" was that the "NewsHour," following the format of the morning news, tended to do more very long stories. A third, 33 percent, of its stories were longer than three minutes. The bulk of these long stories, however, were interviews or panel discussion, which often provide in-depth discussions with a limited range of people. The downside is that these often replace edited packages, which are more densely sourced and written and are less vulnerable to an interview subject's filibustering.

Some in network news say that modern television news stories are probably more densely packed with information than were stories of similar lengths in earlier years. The new technology - satellites, video feeds, computer-generated graphics and more sophisticated editing equipment - allows producers and editors to more easily add more information from more sources. The technology also allows journalists to include more, pithier and shorter soundbites in stories rather than longer but perhaps longwinded ones. Modern audiences are also presumed to process information more quickly. In the period of film in television news, in the mid-1970s and earlier, there was less content available and what was available was more difficult to pack into pieces. As a result, television professionals argue, stories sometimes grew to fill the space.

**Bush as Protagonist**

For years critics also have argued that television has personalized news, causing journalists to build their stories more around people or institutions, and less around events. This was supposedly
especially true of coverage of the presidency. The White House became a backdrop for the president. But even elsewhere, government stories became focused around a single personality, perhaps the mayor in a town, taking on the special interests. Politics became more personal. Television was a character-driven medium.

Does the 2003 content bear this out? To a large degree, no. In all, only 23 percent of evening news stories focused at least half of their content around a single personality, even less than newspapers (32 percent and 28% on newspaper front pages).

**Morning Shows**

If the nightly news is still built around correspondents and taped, edited packages, morning news is not.

Instead, the majority of time on morning news is spent in live interviews (55 percent), usually conducted by anchors. Only about a third of the time on morning news is taped, edited packages (36 percent).

Reading of the news by people on these programs accounts for 5 percent of the time (but 31 percent of the stories), usually in the news summary at the top of the hour, read not by the main anchor but a separate "news" anchor or reader.

**Story and Segment Length**

Time is also spent differently in the mornings than on evening news. The shows produce fewer very short stories, 40 seconds or less, (29 percent versus 42 percent on commercial evening news). They also air fewer stories between 90 seconds and three minutes (30 percent versus 48 percent on commercial evening). Instead morning news relies more on long segments, over three minutes. Nearly a third of morning segments go that long, (31 percent versus 4 percent at night). This may be part of the morning news' appeal. But these are usually interviews, not stories. And that has consequences.

**Sourcing**

Since morning news relies so heavily on interviews as the story-telling medium, audiences are getting their information from fewer sources, usually just one or two people being interviewed by the anchor. The ability to double-check what these people are saying against the facts, or balance that with not only opposing views but also with independent or neutral experts, is more limited. It is by no means impossible, but it is more difficult, and, we found, not often done.

Only 8 percent of stories or segments on morning news had the highest level of sourcing and transparency - four named sources whose expertise and potential biases were explained so that audiences could judge their credibility. (That compares to 18 percent on commercial nightly news).

Format alone is not the whole explanation, though it is a significant part. The "NewsHour," with a similar format, was more likely to have the highest level of sourcing (13 percent of stories, compared to 8 percent for morning).

What about anonymous sourcing? In all, 27 percent of morning stories included at least one anonymous source with some attempt to describe for audiences why the source was credible. This was about the same as nightly network news. And 7 percent of stories included at least one blind anonymous source, about half that of nightly news.
Protagonists

Morning news also stood out for focusing its segments and stories more around people as central protagonists. Nearly half (48 percent) of all stories or interviews primarily concerned how something affected a central protagonist in the action: How do you feel about your son coming home from Iraq? Or how will this affect the president? Or did Kobe Bryant rape that woman? That was a good deal more than commercial nightly news (23 percent) or newspapers (32 percent) and markedly more than on the "NewsHour" (20 percent).

Prime Time News Magazines

This year's study did not include a separate content analysis of prime time news magazines. But two previous studies of those programs, in 1997 and 1999, showed a clear pattern. With the exception of "60 Minutes," the magazines in no way could be said to cover major news of the day. Instead, these programs, up against prime time entertainment shows, specialize in lifestyle and behavior stories, consumer news-you-can-use pieces and celebrity entertainment. In the 1997 study, 55 percent of their stories concerned these issues. In addition, 23 percent concerned crime.

Only 8 percent of stories concerned the combined areas of education, economics, foreign affairs, the military, national security, politics, government or social welfare issues. A similar audit of the magazine programs two years later by the journalist Marc Gunther published in Nieman Reports found similar results.

The CBS "60 Minutes" program stands out as an exception, more likely to touch on issues or topics that involved major events of the day. At the mid-way point in the 2003 - 2004 season, the program aired 12 foreign segments out of 50, about 22 percent, according to an audit compiled for a yet-to-be-published paper by Elizabeth Weinreb, Director of Special Projects at Columbia University Graduate School of Journalism and a former journalist at "60 Minutes." That percentage is about what the show averages in a regular season, according to "60 Minutes" staff calculations. The other exception is "Nightline," the ABC news program that differs from the magazines not only in content but also in time slot and in format. It remains probably the most serious and distinctive news magazine program on television.

Why have the magazines other than "60 Minutes" and "Nightline" moved so far away from major news events? It wasn't always this way. Over the past 20 years, the main mission of prime time news magazines has changed. When "60 Minutes" began in 1968, it was largely seen by CBS as a way to fulfill Federal Communications Commission requirements for public affairs broadcasting. While the network would have liked the show to make money, the other needs it helped meet sustained the show through seven years of poor ratings when it aired irregularly in the Tuesday night 10 pm time slot. It was not until 1975, when CBS moved the show to the dead hour between 7 and 8 p.m. on Sunday that it became noticed. By 1978 it was among the top 10 rated programs on the air and it has been a big success and moneymaker for CBS ever since.

Seeing that news magazines could be moneymakers - and, more important, moneymakers that could be produced relatively cheaply compared with most entertainment programs - the networks went on a news magazine binge in the 1980s and particularly the 1990s. But as revenues and ratings became the new bottom-line, that brought changes in how segments were put together and how they were selected. These programs were competing with entertainment shows and that affected content.

Topics that scored viewers on one program began appearing on different shows within weeks or even
days of each other. Tom Yellin, the executive producer of "Peter Jennings Reporting" on ABC summed up the problem this way: "Deciding you want to do a story because you think it's interesting is a risk. If it doesn't work you will be called to account."

To determine a segment's success, according to Weinreb, many executives turn to research, including minute-by-minute ratings, to determine what kinds of stories hold viewers. And some networks tested story concepts to determine whether segments were winning the "right" (i.e., young) viewers.

The result is that most programs are largely not the home of heavy investigative pieces anymore. And the long-term trend here may be troubling for news professionals when one looks at what is drawing desirable demographics. President Bush's first interview about the war in Iraq after the capture of Saddam Hussein on ABC did not win the ratings battle for younger viewers. More were tuned into Paris Hilton's turn on Fox's reality program "The Simple Life."

**Audience**

When it comes to audiences of network news, the headlines are generally grim. Only one or two programs are increasing their audiences. For most, flat ratings are a victory. The networks are showing no real signs of innovation or of creating genuinely new kinds of news programming that might win new audiences. The lone exception is morning television news, which saw an upturn in 2003.

Some points:

- The three nightly newscasts have seen ratings decline by 34 percent in the past decade, nearly 44 percent since 1980, and 59 percent from their peak in 1969.
- The war offered the nightly news little bump in viewership in contrast with past major news events.
- Morning news is the one relative bright spots for the networks, with audiences holding steady rather than declining over the past 10 years. It had an increase in audience size in 2003 and in 2000 as well.
- The best evidence suggests it is availability, rather than content, that is hurting evening news, but there seems little opportunity to change that.

**The Nightly Newscasts**

The problems confronting the network news divisions are most acute, and for fans of traditional news, most alarming, in the falling fortunes of nightly news.

Television audiences are counted numerous ways. The most familiar is ratings, which count the number of all television sets in the United States tuned to a given program. Share is the percentage of just those sets in use at a given time tuned in to a program. Viewership is ratings converted into the number of people actually estimated to be watching, taking account of the fact that often more than one person is watching a given set.

In November 1980, the year CNN was launched, 75 percent of television sets in use were tuned to one of the three nightly network newscasts each night during the dinner hour. In 2003, it was a 40 percent share.
Of all television homes, 20.6 percent were tuned to the nightly news in November 2003, a drop of 44 percent from 1980, when the networks' nightly news broadcasts had a combined 37 rating.

Yet, much of this decline did not come with the advent of cable, between 1980 and 1990. The drop in audience has been even steeper in the last 10 years, as the number of cable outlets has proliferated, than in the previous 13 years. A decade ago (November 1993), 40.7 million Americans watched the nightly newscasts. By November 2003, that number was 29.3 million, a decline of 28 percent in 10 years.

**Evening News Viewership, All Networks**
November 1993 to November 2003

The decline from the historic peak of nightly news audience is even steeper. In 1969, when viewing choices were admittedly limited, the three network newscasts were watched in 50 percent of all American homes and 85 percent of the homes tuned to television at the time that the newscasts were shown. Since then, ratings have fallen by 59 percent. Share has fallen 53 percent.

**Evening News Ratings**
November 1993 to November 2003
What is driving the flight away from nightly news? How much is it a loss of viewers to cable, or a migration of people to the Internet? Is there a decline in interest in news generally? Do people dislike the changing content of the newscasts? Or how much is the increasingly disadvantageous time slot of nightly news to blame or the shift to more two-income families and longer commutes?

Certainly some of the fall-off seems an inevitable result of technology creating more alternatives. In the 1970s many viewers had only three or four choices on their broadcast television dial. Cable arrived in 1980, expanding the range of television choices to 20, then 30, then 40, or in the case of some cable or satellite systems, 200 or 300 channels. The number of broadcast stations also grew, with the development of UHF stations, and the Fox network (see Cable TV Audience).
Research also suggests that the Internet, including Web sites associated with the networks themselves, has drawn audience more from television than other media, but the extent of that is difficult to assess. A 2000 survey from the Pew Research Center for the People and the Press found that those who regularly went online reported watching less network television news than two years earlier. Fewer watched television news overall, and those who did watched less of it. Meanwhile, viewing among those who did not go online was unchanged. It is unclear, however, to what extent this trend has continued in the last three years.

Local television news, too, now has access to many of the same pictures and stories that were once the exclusive domain of the networks; in recent years local television news viewership has also declined somewhat (see Local News Audience). In 1980, the three commercial networks monopolized national and international news, releasing their footage on these stories only after they had been broadcast on the networks, and even then only in limited amounts. CNN changed that by offering to share its footage with local stations in exchange for their material. In response, the networks began to increase feeds to affiliates. In the process, they inevitably hurt their own newscasts, making them stand out less.

Tastes also have changed. More people brought up on infotainment may prefer lighter fare and may get more of it elsewhere. The branding that comes with specialization ("CNN, the Most Trusted Name in News" or "Fox News, We Report, You Decide") may also be luring viewers away. In an age of such niche fragmentation, a single one-size-fits-all newscast may not appeal to as broad an audience.

Nightly newscasts are also hurt by their fixed time slots compared with the ubiquity and convenience of cable. In the 1970s, the nightly news was generally on later than it is now in most markets - 7 p.m. - and many more Americans were home, in single-income families, and the working fathers had notably shorter commutes. Today, the evening newscasts are often on much earlier, as early as 5 or 5:30 p.m. in some West Coast markets. On the West Coast, the evening news programs have the added problem of being tape-delayed. Viewers know the news they are watching is three hours old. Cable and local news has the advantage of being more up to date.

Add to that the fact that the so-called dinner hour simply offers less of an audience than it once did. Fewer people are home, particularly working people, as commuting times have lengthened, and many parents are seeing their children for the first time since the early morning. The evening news time slot is probably the most disadvantageous on television.

Changes in the content of network evening newscasts may also be a factor. As the evening newscasts have lost viewers, they have cut back on their newsgathering. This has led to a decline in the number of bureaus and beats, and a shrinkage in the number of minutes of news produced in each program (see Newsroom Investment). The evening newscasts have also tried changing their tone, particularly in the mid-1990s, doing more lifestyle coverage and less traditional news about national and international affairs (see Content).

The changes in content and the shift toward seeing news divisions as profit centers have had other implications. The news divisions see themselves as having a different responsibility and persona in American life than they once did. The networks once felt obliged to do authoritative documentaries on major issues of the day - "NBC White Papers" or "CBS Reports," for instance - which burnished the networks' image as serious public institutions. Today, the network documentary has been replaced in prime time by the news magazine program, shows that are much closer to a form of nonfiction reality entertainment than an exercise in social responsibility.
To some extent, all these changes - the new character of existing programs, the growing importance of the morning shows compared to the evening newscasts, the elimination of public obligation programs and their substitutions with infotainment news programming - contribute to the public’s no longer seeing network news divisions as authorities to turn to each day, or even on special occasions, for information and insight.

Most likely, all these factors are at play, interacting with each other.

One element here, the impact of time slot, is sometimes overlooked and deserves more comment. While the nightly newscasts are on a downward path in terms of viewers, what may be even more remarkable, given the increasing disadvantages of the time slot, is how many people still watch. Nearly 30 million viewers each night make the network news programs the three most-watched and influential news outlets in America, even if they have become something of a familiar punching bag for television writers and perhaps even a subject of doubt for their owners.9

Twice as many people watch these programs as are watching the morning shows at any given time. More than three times as many people watch each of these programs as read any of the nation’s biggest newspapers.

Yet these viewers tend to be older and thereby not so attractive to television advertisers, which are highly concerned with attracting young audiences. Money, rather than solely demand, has relegated what some might argue is the best of network news to a subordinate position and has made the problems of the evening newscasts something it is not clear the networks are willing fundamentally to address. Many in network news privately worry about how long the networks want to produce signature evening newscasts at all.10

One comparison that seems relevant to understanding this is network versus local viewership. For many years of network news decline, local news programming seemed to hold its audience, in part, as indicated above, because satellite technology had led to their offering national and international news before the networks did. But today local news is also no longer holding its audience.

Since the late 1990s, local news and the networks appear to be losing audience at roughly the same rate. Nielsen data gathered by the financial research firm BIA show that, on average, early evening local news programs, which usually are broadcast right before or right after the network evening news, have suffered a combined market share decline from a 50 share in 1997 to 41 in 2003. 11 (See Local TV Audience.) This tracks almost exactly with the decline in network evening news share, which has gone from a 49 share in 1997 to 40 in 2003. In any kind of television programming, news or entertainment, the size of the audience of the lead-in program is a dominant factor in determining the size of the audience of the program that follows.

But network news has not suffered as much audience loss as other network programming. Between 1993 and 2001, for instance, according to the Cable Television Advertising Bureau, the three networks saw their share of prime time audience drop by 42 percent. Nightly news during that time dropped 23 percent.12

The Race Among the Networks

Which of the three networks is on top in the evening news?

This was once a vital question. In the late 1980s and 1990s, the evening newscasts contributed big
profits to the networks. For even longer, being No. 1 in nightly news was a key to a network's brand, adding prestige. It gave the news divisions not only bragging rights, but better access to newsmakers as well.

For much of that time, the history of network news was characterized by several distinct eras. In the early 1960s, the "Huntley-Brinkley Report" on NBC dominated. In the late 1960s and 1970s, Walter Cronkite on CBS was No. 1, and that newscast continued to lead for some time in the 1980s when Dan Rather took over. NBC News was emerging as No. 1 until General Electric took over the network in the mid-1980s and made moves that caused the network to temporarily stumble. In the late 1980s and early 1990s, Peter Jennings' ABC "World News Tonight" dominated. And in the late 1990s, a resurgent NBC saw Tom Brokaw on top, although this owed more to the other networks losing viewers than NBC gaining.13

**Evening News Viewership**

November 1993 to November 2003

![Evening News Viewership graph](source: Nielsen Media Research unpublished data, [www.nielsenmedia.com](http://www.nielsenmedia.com))

Throughout 2003, NBC had a narrow edge in ratings, followed closely by ABC, then, farther back, by CBS.14

To understand the race, consider the fortunes of each network over the last decade. Using numbers from the critical November sweeps month, the CBS "Evening News" with Dan Rather has seen the biggest decline. Its viewership has fallen 37 percent in the last decade (from 13.1 million viewers in 1993 to 8.3 million in 2003), and even more since 1980. "World News Tonight's" viewership on ABC has fallen 29 percent (from 14.3 million viewers in 1993 to 10.1 million in 2003). NBC's "Nightly News" has fallen the least, but still a substantial 18 percent (from 13.3 million viewers in 1993 to 10.9 million in 2003), according to Nielsen data. These Nielsen numbers actually show a near 2 percentage-point gain for NBC in the last year.15 NBC's "Nightly News" took over the No. 1 spot in 1997, and has
remained there most weeks since.

Why has NBC fared better generally over the last seven years? A detailed analysis of one program over another is not the focus of this report. But some mention of possible factors can show how complicated the mix of variables can be. NBC has the advantage of having a cable network and one of the biggest news sites online with MSNBC.com, which was launched in 1996. Strategically, each of the brands was supposed to reinforce each other. Loyalists to MSNBC.com would naturally turn to its siblings when they wanted broadcast (NBC) or cable (MSNBC) or even financial news (CNBC). NBC has almost one minute more of news content above the three networks' average, which, given channel switching during commercials, is probably also significant. In addition, the popularity of the "Today Show" in the morning may be another factor, building loyalty to NBC News as a brand, which spills over into viewers watching the network's nightly news as well. According to at least one survey by TV Guide, Tom Brokaw is the most trusted anchor on television, either network or cable, although it is not known whether this is a result of Brokaw's audience size or the cause of it. Another important factor was that during much of this period, NBC had the most successful prime time lineup of the three networks.

It must be stressed, however, that NBC took the No. 1 spot more because of ABC losses than NBC gains. In 1994, when NBC was third in the ratings, it had 11 percent more viewers than it does today, when it is No. 1.

The Age Factor

The ratings trends for nightly newscasts are a problem by themselves, but the age issue makes the long-term prospects even more complicated. Not only are their audiences shrinking, but they are also getting older. The commercials on a network evening newscast tell something about the audience. They are often a string of pharmaceutical ads aimed at older Americans.

The median age of network evening news viewers in 2003 (from 59.5 for ABC to 61.2 for CBS) is around 10 years older than network programming as a whole (which was 45.7 to 52.2 in 2002). For the American population as a whole, the median age is 35.3. This makes the nightly news a less attractive sell to advertisers, preoccupied with youth (see Economics) and thus less lucrative for the networks. According to network officials, the ad rates networks can charge for older audiences are substantially less, perhaps even a third lower, than those charged for the youngest demographics. In terms of long-term strategy, moreover, what happens in 10 years when a significant portion of the network news audience has died?

The Networks in 2003: War No Cure for the Problems

Traditionally in times of national crisis, like the war in Iraq, viewers have turned to the networks for coverage, if not the first night, then within a day or two.

That did not happen in 2003 with the war in Iraq, and some television writers called this an important change, another signal of decline for the network news and the evening newscasts in particular.

The total number of viewers tuned to nightly news actually dropped during the war. After rising just slightly the first week of the war, to 32.2 million viewers, nightly news viewership fell as the war continued. The number of viewers on the three nightly newscasts dropped by 2.7 million the second week of the war and 1.6 million more the third week as American soldiers got to Baghdad. On cable, by contrast, ratings more than doubled during the war (see Cable), though that audience has vanished
Does this spell an even more dire future for nightly news, as some journalists have predicted? 

Not necessarily.

A closer look at the Iraqi war ratings suggests two other lessons.

In a head-to-head moment, when cable news and network news are both in continuous live coverage, Americans still prefer the old broadcast networks.

On the first night of the war, from 9:30 to 11 p.m., 42.2 million people turned to the three networks and their nightly anchors, according to estimates made by Nielsen. Less than half as many (19.2 million viewers) tuned to the three cable networks, and 7.7 million more turned to Fox News on broadcast. Combining Fox broadcast and Fox cable would put Rupert Murdoch's two channels in second place among the networks (at 15.6 million), well behind the combined NBC and MSNBC (at 22.2 million). But that would be ahead of CBS (at 13 million) and ABC (at 11 million), neither of which has a news cable sibling.

A further look at the ratings also suggests that people turn to network for some things and cable for others. During times of intense crisis, the continuous 24-hour coverage of cable may be appealing. Indeed, the networks converted to continuous coverage during the first two days of war and saw viewership spike, then went back to regular programming and saw viewership fall. The contrasting formats we found in the content of evening newscasts versus cable are also instructive. Evening news specializes in taped packages, cable in live stand-ups. The Pentagon's embedded reporter program...
tended to showcase cable skills (felicity with extemporaneous first-person monologue) and made traditional newsgathering (interviewing, fact-checking, getting all sides of the story, editing) logistically impossible.

But during other times, when events are moving more slowly, people may still look to the somewhat more reflective coverage offered by the once-a-day evening newscasts. The run-up to war may be a case in point. Nightly news viewership actually rose in the weeks leading up to the war. The highest ratings in 2003 occurred in mid and late February, when 32.7 million viewers tuned in to the three evening newscasts, according to Nielsen Media Research. The Tyndall Report said that these two weeks were dominated by coverage of Hans Blix's preliminary report on Iraq's weapons programs and the United Nations debate on a resolution in support of using military action against Saddam Hussein.  

*NBC Fares Best, Wins the War*

The network that drew the most viewers during the war was NBC. In the first week of the war, NBC's "Nightly News" recorded its single highest number of viewers for the entire year (13.2 million viewers). While NBC's "Nightly News" picked up a point in share during the week, ABC and CBS lost a point each, though the bump in viewers at NBC was short-lived. One interpretation of these share figures is that NBC's gain was at the expense of ABC and CBS. Yet another interpretation is that during major news events, marginal news viewers tune in to the network nightly newscasts, and do so disproportionately to the time slot leader (in this case NBC). At the same time, some hardcore evening news viewers, news junkies, defect to 24-hour cable. Thus ABC and CBS might have lost more viewers to cable than they gained in new viewers, while NBC gained more than it lost to cable. This is, however, only a theory.

**Morning News**

After a night of bad news, network executives are probably quick to tell themselves things will look better in the morning.

And they do. Morning show viewership, in contrast with evening, has held steady and in some cases has actually risen slightly in recent years.

As of November 2003, 14.6 million Americans watched the three network morning news shows, one million more than a decade earlier.

The rise has not been steady. For instance, looking again at the critical November sweeps numbers, ratings rose in 2000, during the Florida election fiasco (14.5 million Americans watched the morning shows). Yet a year later, as the U.S. moved into Afghanistan after September 11, the number of people watching the morning shows was actually smaller (13.8 million). The number drifted upward again in November 2003.

**Morning News Viewership, All Networks**

![Graph of Morning News Viewership, All Networks from November 1993 to November 2003](http://www.stateofthemedia.org/printable_networktv_total.a...)

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Why have morning shows proved more stable than evening? Again several factors likely converge here.

Clearly the question of time slot is significant. The morning shows are on, or at least begin, when most Americans are still home, just starting their days. The number of people home in the evenings is shrinking.

The researcher Andrew Tyndall also theorizes that on the two top morning shows - the "Today" show on NBC and "Good Morning America on ABC - a factor in their appeal is that they offer 20 minutes of content without commercial interruption. People wanting news and information, or even diversion, in the morning and getting ready for work will leave when the commercials start. In an age of growing commercial time, this stands out.

The morning shows are also far more flexible and lighter in content. They can fill their time with infotainment, scandal mongering, tabloid fare, thinly veiled reality programming (wedding planning or makeovers) or seasonal recipes, all with a straight face. Or they can devote the first half-hour to news from Iraq or Washington, although they do not often do so.

The morning shows have also tinkered with their formats and changed their looks somewhat more than the evening newscasts to keep viewers interested and freshen their genre. In 1994, NBC began the wave of changes when it moved the show back to a ground-floor studio in Rockefeller Center in New York City that had a window out onto the street (as it had in its earliest days with its first host, Dave Garroway) and began to incorporate the street crowd more in the program. Not long after, CBS and ABC followed suit with their own elaborate studios. (The trend has also spread to cable: both CNN and Fox News use street-side studios for their morning programs.) Morning musical guests and street concerts also became a bigger part of the morning show routine in this time. And the weather segments have become longer features that involve the assembled throng. In many ways, too, the anchors of the "Today" show and "Good Morning America," particularly Katie Couric and Diane Sawyer, are the biggest stars of the news divisions today, the most highly paid and promoted.

Morning news programs are attractive to advertisers because they provide access to a younger audience than the evening programs. In fall 2003, according to analysis by Magna Global USA, a market research firm, the median age for each of the networks morning shows audience ranged from 51.3 to 53.1 years, compared with 59.5 to 61.2 years for each of the network's evening shows. Looked at another way, while the 25-to-54-year-old audience for evening news is 27 percent larger than the morning news audience, the 50-plus demographic is 145 percent higher than the same demo
during morning news. The morning shows are a more efficient way to reach the younger audience that advertisers prefer.29 The morning programs also get "softer" as the younger demographics go to work and the nonworking mothers and older viewers remain at home.

**Median Age of News Program Audience**

![Bar chart showing median age of news program audience](image)

Source: MagnaGlobal USA, "Daypart briefings"

"Today" on Top

Among the morning shows, NBC's "Today" has been the clear leader since 1995. Its viewership had actually risen to the top spot by a significant margin in the mid-1980s but declined after the network's takeover and shakeup by General Electric. "Today" vaulted back to the top in the mid-1990s after the arrival of Katie Couric and after it moved to its street-level studio, largely taking viewers from ABC. Overall, "Today's" audience is 38 percent larger than it was a decade ago (6.5 million viewers in November 2003, up from 4.7 million viewers in November 1993).30 "Today's" totals peaked at 7.2 million in November 2000 when NBC's Tim Russert appeared on an almost daily basis, having sealed his reputation as a political oracle with his Election Night blackboard prediction that results would depend on "Florida, Florida, Florida."

**Morning News Viewership**

November 1993 to November 2003

![Line chart showing morning news viewership](image)
ABC's "Good Morning America" now draws the same number of viewers that it did a decade ago, but it has been a roller coaster ride. The No. 1 morning show in 1993, its audience fell by 36 percent by 1998. After revamping the show around Charlie Gibson and Diane Sawyer in 1999, it had rebuilt its audience by the November 2003 sweeps back to 5.2 million viewers. That had narrowed the gap with "Today" but still put it in second place by 1.3 million viewers.  

CBS's "Early Show" is a distant third. Despite ups and downs and format changes, its audience in November 2003 was 21 percent smaller than a decade earlier.

The Sunday Shows

Another franchise of network news that deserves note is the Sunday morning talk show. In recent years, "Meet the Press" on NBC, whose host is Tim Russert, has established itself as the dominant ratings leader. At the end of the 2002-2003 season, it led its nearest competitor, CBS's "Face the Nation," with its host, Bob Schieffer, by 1.8 million viewers (4.7 million versus 2.9 million). Since the 1997-1998 season, it has led consistently. ABC has changed the format of "This Week," with George Stephanopoulos as host, under producer Tom Bettag and a team from Nightline. This is worth watching. At the end of the 2002-2003 season "This Week" averaged 2.75 million viewers.

The Cable News Challenge

It is difficult, as mentioned before, to apportion precisely where network news audiences are going to, given the variety of changes that have occurred in technology, competition and lifestyle, plus the content of network news.

But since the steepest decline in network viewership dates back to the 1980s and the advent of cable, it makes sense to look closer at the impact of that medium.

Network executives are quick to point out that, even while ratings have dropped, more than 29 million people still watch the networks news on average in the evening, and just under 15 million still tune in for the morning shows. Those numbers far outstrip any cable network news program at anytime, even when the cable networks' highest-rated programs are airing. There are 2 million people watching the average cable news program in prime time, but that figure hardly matches the losses in network viewership in nightly news.
Ratings and viewship, as cable executives are quick to note, are not the whole story. Ratings tell only how many people are watching a given program. They do not add up how many different people cumulatively turn to cable or network news over the course of a day, a number analogous to unique visitors in the online world. This, cable professionals say, is important in understanding the appeal of their medium.

To more fully assess the flight of network news audiences, one must turn to survey data. These suggest that a more significant part of networks' loss has been cable's gain. Contrary to the ratings data, according to studies by the Pew Research Center for the People and the Press, more people now prefer cable news than network news as their source for national and international news. As far back as 1993, when CNN was the sole cable news channel, the public was as likely to turn to cable as network. By 1999, Pew data showed cable with a 13-point advantage over network. In March of 2003, the gap had widened to 27 percentage points.  

**Where People Go for National/International News, Network vs. Cable**

Do you get most of your news about national and international issues from network TV news, from local TV news, or from cable news networks such as CNN, MSNBC, and the Fox News Channel?

![Design Your Own Chart](http://www.people-press.org)


* Dates not to scale. Based on survey responses. Respondents allowed to give two answers.

Why? Is there something in the nature of cable news content that people prefer over network news content? Or is this preference for cable a function of availability?

Here the superior ratings of network news programming over cable become relevant. In head to head competition, when network news and cable news are on at the same time, network news prevails, and by a large margin. This suggests that people apparently do not prefer the way cable does the news; they prefer its instant availability. The age of appointment news - when people would structure their time to wait for a certain program to come on - has faded. People now want their news, or their kids' programming, or their cooking show, when they want it.

One question is what the networks will do when the current evening anchors retire. Will audiences for
evening news shrink further when the familiar faces are gone? If so, will the networks decide to abdicate covering news nearly entirely, having skeletal crews that can offer just enough traditional hard news to fill a morning show or an occasional prime time magazine segment, but not purport to cover the world in any comprehensive way? Or will they seek newer ways of offering news, perhaps to a younger audience? Some say NBC has already taken steps in this direction with CNBC and MSNBC.

Researcher Andrew Tyndall says, "NBC has become the cross-medium multi-demographic news division for the entire conglomerate. It was a great institutional failure of ABC News and CBS News not to have replicated what NBC News has done. If, for example, CBS News was responsible for news for children (on Nickelodeon), for youth (on MTV), for African-Americans (on BET), for men (on Spike), on the radio (Infinity) and so on, it would once again address the mass market that Cronkite once did and put the Tiffany in Viacom, as it were. That potential audience for CBS News is already waiting in Viacom's distribution system, but the news division just does not have the vision or the corporate ambition to revive its once-famous name."

Economics

For all that people think of network news as some kind of dinosaur, financially news is an important part of the network television bottom line. Maybe, some might argue, it has become too important. Overall, news contributes a big part of network profits, particularly in times when developing hit entertainment shows is proving difficult and signing sports contracts too expensive.

Several things stand out.

- Revenue from nightly news was up in 2003 (based on projections), the first up-tick since 1999.¹

- Despite having less than half as many viewers, morning shows greatly outshine nightly news as moneymakers, in large part because they are on two hours a day rather than 30 minutes and pack in more commercial time. The "Today" show and "Good Morning America" bring in nearly three times the revenue of their evening news counterparts.²

- The heyday of the prime time network magazines shows may be over. They air less often than they did a few years ago and earn less in advertising revenues.³

Getting a handle on the finances of network news is difficult. The news divisions are now small elements inside large corporations, of which even the networks themselves are just a small part. Many news organizations no longer have people covering network news from a financial point of view and the companies release little information publicly about them.

What is more, events can change the finances of news substantially. For instance, executives at one of the three networks report confidentially that in 1991, their network was headed toward returning $100 million to the bottom line of their company from news before the first Gulf War began. The cost of covering that war, including the giving up commercials, reduced that number to $65 million in operating profit from news for the year.

Twelve years later, insiders report, after covering the second war in Iraq, the same news division was fighting to remain revenue-neutral, to return no profit to the bottom line, but also not fall into the red.

Becoming a Profit Center
The first great change in the finances of network news came in the mid-1980s, when the news divisions were asked to become profit centers for their companies.

Until then, network news divisions were asked to bring prestige, rather than profits, to their owners. In the language of today, prestige was essential to "branding." News, in other words, was relevant to network economics but in a long-term and more indirect way. As the late CBS chairman William Paley once was quoted as telling his correspondents, "You worry about the news. I've got Jack Benny to bring in the profits." 4

News also kept the federal regulators off the networks' backs. Today this is no longer much of a concern, not since the FCC began systematically deregulating television in the 1980s.

Evening News Economics

As is true with audience trends, the direction of evening newscast economics in recent years has not been good, but 2003 may have bucked that trend as the economy showed some strengthening.

Still, say industry insiders, the nightly newscasts remain profitable and solid part of the network's bottom line.

Unfortunately, there are little or no public data on the operating profitability of news divisions alone. To a large extent, in trying to get a handle on finances, we are limited to looking at estimates of revenues. And even here accounting practices and bundling of ad sales make the picture fuzzy.

From 1999 to 2002, the three networks together have seen their evening advertising revenues drop 6 percent, according to data from TNS Media Intelligence, a market research firm. Most of this decline occurred in 2000 and 2001, as a slumping economy resulted in a shrinking advertising market.

But the drop cannot all be tied to a sluggish economy. It began before the economy sagged and at some points occurred even while ratings had seen an up-tick.

Both the NBC "Nightly News" and the ABC "World News Tonight" took in considerably more money in advertising revenues in 1999 than they did in 2002. In four years, NBC's revenues fell off 13 percent and ABC's fell 9 percent. These two programs saw big drops in 2001, around $14 million each, as the advertising downturn rippled across all media. 5 But this is not entirely attributable to ratings, which were rising for both NBC and ABC in 2000. ABC saw a big ratings jump in 2001 as the revenues fell. 6 The advertising slump that began in 2000 with the sharp decline in the stock market and the popping of the dot.com bubble is also a factor here, industry professionals add, making a difficult situation look somewhat worse.

At CBS, which has the least-watched nightly news broadcast, ad revenues improved: The CBS "Evening News" experienced an 8 percent jump in advertising revenues from 1999 to 2002. In 2002, CBS eked its way into the second-place revenue spot, even while it was the clear third-place finisher in ratings. 7

Partial 2003 data suggest the trend may be changing. The networks saw strong advertising revenues for the first eight months of 2003 and appeared to be on course to show significant gains over 2002. 8 By August of 2003 all the evening news show had taken in more than $100 million in revenues. 9

According to the TNS data tracking advertiser spending, the NBC "Nightly News" with Tom Brokaw had taken in revenues of more than $110 million through August. The program was thus projected to
have its best year since 2000, with estimated revenues of $165 million. CBS, which had taken in $106 million by August, looked ready to have its best year since before 1999 ($159 million in revenue). And ABC, with more $100 million in its coffers, was on track to beat its 2001 results (with $150 million in revenue).

These revenue numbers, however, need to be viewed carefully, industry insiders say. The networks, particularly NBC and ABC, are selling ads in packages. So an NBC ad buy could include, for instance, the network nightly news, CNBC and MSNBC, plus online deals with MSNBC.com. That gives networks leeway in terms of how they assign the revenues to different programs. It is possible that the revenue data, insiders say, are comparing apples and oranges.

Indeed, some network news professionals say the bundling of ad sales has become an important factor in the race for No. 1 in evening news. If you are on top, you have more leverage to bundle ad sales, to tell advertisers that if they want preferred spots on the evening news, they may be forced to buy time in other programs.

According to internal network sales data provided to the Project for Excellence in Journalism by a confidential source, in fact, these public projections of 2003 revenues are close but not entirely accurate. This internal network accounting for 2003 shows the No. 1 rated NBC "Nightly News" topping $200 million in ad sales. The No. 2 rated ABC "World News Tonight" was second at more $170 million and No. 3 CBS "Evening News" took in about $133 million. It is difficult to assess which numbers are more accurate, the internal or the public estimates. Executives say the bundling of ad sales make all the estimates somewhat softer, or more a matter of accounting judgment, than they once were.

**Evening News Revenue, by Network**

1999 to 2003*

![Design Your Own Chart](http://www.stateofthemedia.org/printable_networktv_total.a...)

Source: TNS Media Intelligence/CMR unpublished data, www.tnsmi-cmr.com

* 2003 revenue is PEJ projection based on Jan.-Aug. data.
Morning Shows

Far from the downward trend surrounding the evening newscasts, the revenue picture of morning news appears more stable. Other than "Meet the Press" on NBC, indeed, the network's "Today" show is the longest-running program on network television.  

And today, in an age when success in entertainment programming is becoming more difficult, morning shows, with their 10 hours of programming a week (15 hours for the "Today" show on some affiliates plus four more on weekends), morning shows are more important than ever. This is why networks like ABC are trying to create weekend versions of their morning programs to compete with NBC.

Not only are the morning shows enduring, but they are also growing. In the four years of 1999 through 2002, morning show revenues are up 37 percent, according to the data from TNS.

To get a sense of their significance, consider this: Together, the three morning shows take in more than double the revenues of nightly news, despite half the ratings. A key reason is that the morning shows are on four times longer - two hours a day versus 30 minutes - and pack more commercial time or sponsored segments into each half-hour.

In 2002, NBC's "Today," ABC's "Good Morning America," and CBS's "Early Show" brought in over a billion dollars in combined advertising revenues to the networks.

The national economic slowdown had only the smallest of impacts. Only "Good Morning America" had a decline in revenue from 2000 to 2001, and a small one at that ($4.6 million). In 2002 its numbers were up again.

Morning News Revenue, by Network

1999 to 2002

Design Your Own Chart
Financially, morning is something of a two-network race. According to the data from TNS, NBC's "Today" show and ABC's "Good Morning America" are actually closer in revenues than they are in ratings, and have been since 1999. Through the first eight months of 2003, both programs had taken in about $300 million each.\(^{13}\)

From 1999 to 2002, moreover, both had seen revenues grow by at least 30 percent.

CBS clearly lags behind though it has made significant gains since 1999, when the "Early Show" replaced the struggling "CBS This Morning." Since then, it has had the greatest growth in advertising dollars among the three networks, 56 percent, although it is building on a smaller base.\(^{14}\)

In the reverse of what we see for evening news, the morning shows are able to generate these powerful increases in revenue without increases in ratings.

Again, this has something to do with demographics. The younger viewers these shows bring in, including stay-at-home moms, may allow the networks to command more from advertisers.

Yet this is only part of it. Morning shows have also found ways to generate new revenue by creating advertising opportunities even within the content of the programs, and outside the commercial breaks. Sponsored weather spots, product-oriented gardening tips and other potential revenue opportunities are now commonplace.

### How Morning News Shows Use Their Time, 2001

<table>
<thead>
<tr>
<th>Division of Time, in Minutes</th>
<th>June 2001</th>
<th>October 2001</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Air Time (minutes)</td>
<td>120</td>
<td>120</td>
<td>120</td>
</tr>
<tr>
<td>Commercials</td>
<td>35</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Local News</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Products</td>
<td>16</td>
<td>17</td>
<td>16.5</td>
</tr>
<tr>
<td>Promotions</td>
<td>10</td>
<td>5</td>
<td>7.5</td>
</tr>
<tr>
<td>Subtotal</td>
<td>70</td>
<td>66</td>
<td>68</td>
</tr>
<tr>
<td>Remaining Time</td>
<td>50</td>
<td>54</td>
<td>52</td>
</tr>
</tbody>
</table>

In addition, a 2001 study conducted by the Project found that, excluding commercials and local news inserts, these morning news programs dedicated 32 percent of their time, or roughly 24 minutes of program, to selling viewers something - a book, a movie, a kitchen or garden gadget, a Web site, other network programs or a segment later in the show, some of which, though not all, were sponsored segments.

Add in the 35 minutes of commercials per program, and more than half of every two-hour show was spent selling viewers something. In short, if viewers tuned in for an hour of morning news, they would get just 25 minutes of network news, weather and other features not related to products and
promotions.

The shows also have become vast sources of self-advertising, or synergy, for the corporate owner. In the study, each of the morning shows did more stories about its own parent company products than it did about any other single company, especially its media competitors. Disney products were most likely to appear on ABC, Viacom products on CBS and G.E. products on NBC.15

The morning time slot is also interesting for another reason. It is the one time of day where the networks go head-to-head with cable news operations with virtually the same kind of programming. From 7 to 9 a.m. Eastern time, both cable and network air similar morning shows.16 And in this time slot the networks prevail. As we saw in nightly news, head to head, many more people watch network morning news programs than comparably styled cable news morning programs.17

Fox plays an interesting role in the morning show battle as well. On the West Coast, where the NBC, ABC and CBS morning shows are tape delayed, Fox's affiliates offer local live alternatives.

Sunday Show Economics

When it comes to Sunday morning programs, industry insiders say that NBC's "Meet the Press" is a significant profit producer for the network. In 2001, NBC reported that the show earned an operating profit of $50 million. That was up, reportedly, from $800,000 in 1991.18 The other Sunday shows reportedly add to the bottom line but not as significantly.

Prime Time Magazines

If morning shows show a dazzling durability, the revenue figures for prime time news magazines reveal a downward trend that suggests that the golden era of the network magazine show is over.

Through most of the 1990s these shows had been a boon to the news divisions. The genre really took off in 1992 with NBC's "Dateline," which used a different organizational concept to change the game. Instead of using a small staff to produce a once-a-week show as the other magazines had done, NBC used its entire news staff to churn out stories steadily. "Dateline" did not air once a week, but instead it was on more often - at its peak five times a week - and there weren't stars. There was a rotating cast of anchors and reporters. The brand of the show was NBC news and the show name, not any specific person. The other networks began to follow suit, putting magazines on multiple nights. ABC put its "20/20" and "Primetime" together and made them into a three-night-a-week production. And CBS even took the step of expanding its news magazine franchise, "60 Minutes," into a twice-weekly show, and its "48 Hours" magazine also aired twice a week. At the peak of the prime time news magazine craze in 1997, 10 out of a possible 22 hours of prime time network programming on the big three was filled with news magazines.19

But from 1999 to 2002, revenues for these programs fell 48 percent.20 And the most obvious reason is quantity. From that 1997 high of 10, the amount of time devoted to prime time magazines per network has shrunken to, in most weeks, two hours, clearly affecting these program's revenues.

News Magazine Revenue, Select Programs

1999 to 2002
Perhaps the most interesting question is why the networks cut back on magazine programming. To some extent, the market for magazines had been glutted. There were too many of them. The history of television networks is filled with genres that were "hot" and later discarded, from westerns to quiz shows.

The issue is not how many people watch a magazine show. It is how many people might watch something else instead. And in 1999 networks found a new alternative with many of the same advantages as news magazines and a potential greater upside.

News magazines became popular as prime time programming because they were cheaper to produce than entertainment programming - sitcoms and dramas - roughly half the cost. Thus a network magazine could make money with a magazine show that generated lower ratings than an expensive hour-long drama or two half-hour sitcoms. In a sense, say industry insiders, networks used prime time magazines, in part, to plug holes in their entertainment schedules and tended to use more of them if they were having trouble finding successful entertainment shows.

In the last four years, the networks found even cheaper-to-produce programming - reality TV. And if one hits big, like "Survivor," the first "Bachelor," or "American Idol," the upside is far greater, if more short lived.

News magazines are being supplanted, in part, because Americans prefer shows like "Fear Factor" and "The Bachelor." As a result, NBC's "Dateline," which was on five nights a week in 1998, is now on only twice a week.

On the other hand, there are some, such as Lawrence Grossman, a former NBC News president, who argue that, aside from "60 Minutes," the term "news magazine" has become something of a misnomer for these programs. They might be better labeled "nonfiction entertainment magazines."

One question to watch is whether "60 Minutes" will continue to be the exception in 2004 and beyond with the departure, not entirely voluntary, of the founder Don Hewitt, the 81-year-old network news legend who is among the last off-air executives who was powerful enough on his own to push against
the more transitory financial concerns of his business superiors.

"Nightline"

Standing apart from most of these characterizations is "Nightline." It does not air in prime time and it does not follow the traditional news magazine format. As many of the magazines have gone more infotainment-oriented and sensational in content, "Nightline" has resisted. It also has changed its format and updated its look and feel a good deal more than some might imagine, without changing its seriousness, becoming much more flexible than its original format of a six-minute set-up piece followed by 15 minutes of interview. And while it has also seen its revenues decline in recent years, it has been far more stable than most news programs and much more than entertainment programming.

But avoiding the problems and resisting the pressures that have beset other network shows has not entirely protected "Nightline." In 2002, ABC considered luring David Letterman away from CBS to fill the 11:30 p.m. Eastern time slot. The deal eventually fell through and Letterman stayed with CBS, but the fact that ABC pursued him suggests that "Nightline's" approach to a weeknight magazine may be threatened. The problem wasn't that Nightline wasn't profitable or that its audience was too old. According to internal numbers from ABC Nightline at the time was expected to make $13 million in profit. The problem was merely that Letterman might have made more money and attracted even younger demographics. The issue becomes one of purpose. If a network's owner feels that it gains something from offering a "Nightline" program to the society, it will view things one way. If it feels it gains operating income from offering "Nightline" and little more, it will view things another way.

The Value of News

This raises the question that ultimately will face all network news programming. To what extent are the news divisions important to the viability of television networks and their conglomerate parents as a whole, even if they do not happen to be significant profit centers? To what degree are the lead anchors, for instance, major faces for the brand? How much does a strong news presence makes the network more attractive to affiliates? To what degree is news less vulnerable than entertainment programming to fads and strong-arm negotiations from Hollywood stars? How important is it that, because news is a capital-intensive form of programming, once the investment has been made, the incremental cost of producing more news - be it a special report or an added night of prime time magazine programming - is relatively low while the cost of entry for competitors is high or a new entertainment program is high?

These are more subtle issues than how much a nightly news program or a morning show adds to the bottom line. These are intangible matters of judgment, even intuition. They come down, to a greater degree than some other choices, to the values of the people who run the company. Yet they play a role in the strategic planning of a network, in the willingness to invest in news content, in budgeting and in what new business models a media conglomerate might want to invent.

Ownership

In the last 10 years two networks of the big three, ABC and CBS, have been part of large-scale mergers, and the third, NBC, which went through a large-scale merger of its own earlier, has spread its news division onto cable with all-news channels. As 2004 began, another merger possibility appeared on the horizon, the takeover of Disney, the owner of ABC, by a smaller cable company, Comcast. Network ownership stands out from the other media sectors in two important ways:

- The big three networks that air nightly newscasts are owned by true behemoths of American
media. All three owners - Viacom, Disney and General Electric - were among the top five media companies in the country in overall revenue in 2002.¹

- Because these conglomerates are so big, their news divisions are proportionally a much smaller part of the company than they were under their previous owners.

These two points play an important role in where network television news may be headed. Increasingly the question for network news divisions is how they will carry on in a world where they are a smaller and smaller element of the whole. It is difficult, for instance, to find any mention of NBC News in General Electric's annual report, one indicator of where something stands on corporate strategic planning boards.

The Biggest Big Boys

Viacom, the owner of CBS, is the second-largest media company in the country. Disney, the owner of ABC, is the fourth. NBC (as a division of G.E.) is the fifth.²

In some ways this should insulate the network news divisions. Their owners are powerful and in theory should be diversified enough that they would have more resources for news and more economies of scale to produce news more efficiently. But size can also mean that news becomes a smaller and potentially less important part of a company's purpose, farther away from its core values, just another contributor to the bottom line.

### Television Revenue as Percent of Total Corporate Revenue

<table>
<thead>
<tr>
<th></th>
<th>2002 Broadcast Revenue</th>
<th>2002 Cable Revenue</th>
<th>2002 TV Revenue (Broadcast + Cable)</th>
<th>2002 Total Revenue</th>
<th>2002 Broadcast Revenue as % of Total</th>
<th>2002 Cable Revenue as % of Total</th>
<th>2002 TV Revenue as % of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viacom</td>
<td>$7,490</td>
<td>$5,052</td>
<td>$12,542</td>
<td>$24,606</td>
<td>30%</td>
<td>21%</td>
<td>51%</td>
</tr>
<tr>
<td>Disney</td>
<td>4,485</td>
<td>4,428</td>
<td>8,913</td>
<td>25,329</td>
<td>18%</td>
<td>18%</td>
<td>35%</td>
</tr>
<tr>
<td>NBC (GE)</td>
<td>6,763</td>
<td>627</td>
<td>7,390</td>
<td>131,698</td>
<td>5%</td>
<td>0.5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: AdAge, "100 Leading Media Companies"

Viacom's broadcast television holdings, for instance, generated $7.5 billion in revenue for 2002. As hefty as that sum might sound, it was not even a third of the company's $24.6 billion in revenues overall. Disney took in $4.5 billion in broadcast revenue in 2002. That was not even a fifth of the company's total of $25 billion. And NBC's $6.7 billion in broadcast revenue was barely 5 percent of General Electric's $132 billion.³

The Networks and Their Owners

It should be noted that the companies that own the ABC, CBS and NBC have television holdings beyond their over-the-air networks. They all own some cable networks, though the extent of that ownership varies. Disney owns the sports giant ESPN and its sibling networks as well as the Disney
Channel and ABC Family.

G.E. owns all or portions of A&E, Bravo, the History Channel, as well as CNBC and MSNBC (a 24-hour news network) on cable, and the Hispanic broadcast network Telemundo.

Viacom owns Showtime, Nickelodeon, MTV and BET on cable, as well the UPN broadcast network. While the ownership of those cable networks allows the parent companies to generate revenue by network entertainment shows, it has had less effect on the news division's programming, with the exception of NBC and its cable news outlets. Below is a quick look at the individual relationships between the owners and their news divisions.

ABC and Disney

When Disney purchased Capital Cities Corporation (and ABC) for $19 billion in 1995, it was thought to be a dream come true for believers in synergy. The network would give Disney, which created a lot of content, a place to air its work. But for ABC's news division, the merger has not led to success. From the start there were problems, such as when ABC's "Good Morning America" was broadcast live from Disney World, a move that was lambasted by press critics. The Disney CEO, Michael Eisner, made statements that raised doubts about his understanding of the ABC brand, as when he famously said that it was impossible for ABC News to cover Disney. Shortly after the merger, Disney made another telling decision. It scrapped plans to launch a 24-hour cable news network, a move that would have allowed ABC to follow the cross-platform plan that has so helped NBC. Disney thought the costs would be too great. Yet at the time, the widely-accepted superiority of ABC's news division would have likely given it an enormous leg up over any rival.

The numbers are even more revealing. At the time of the merger, ABC was the leader of the network news divisions - on the top in ratings and revenues, and its programs dominant in most of their time slots, including nightly news.

Under Disney, nearly every program has stumbled, and the poor performance of ABC's entertainment division has only made the problems worse. The news division has since gone through several rounds of staff reductions (either through contracts not being renewed or layoffs), closed bureaus around the world and the United States and has watched its position sink to second in ratings on the evening news and third in revenues. The network also developed a plan to replace its "Nightline" franchise, considered by many the best news program on commercial network television, and woo the Dave Letterman program from CBS for its time spot. After two humiliating weeks for Disney and ABC, Letterman turned them down, in significant part because he, unlike Disney, did not want to be known as the man who killed "Nightline." All of these were bottom line decisions, caused by the parent company wanting a larger return.

Some argue that the focus on the bottom line and cost cutting did not begin with Disney, and the record shows that is the case. There certainly was downsizing under the previous owner, Capital Cities, coinciding with declining viewership. But relative to other networks, ABC News prospered economically and in the view of media critics. That has not been the case since the acquisition by Disney.

In early 2003, Disney's tortured stewardship of the news division seemed to come full circle. Disney considered the possibility of merging with CNN to get access to cable's second source of revenue - subscription - as well as the ability to amortize product across multiple platforms. The deal never happened.
With the arrival of the unwanted bid for Disney by Comcast, ABC in many ways seemed at the center of the deal. While ABC would become an even smaller part of a bigger company, television (both broadcasting and cable), would become a bigger part of the whole. ABC had fared better critically and financially under Cap Cities than it had under Disney. Would Comcast's background in television make a difference?

_NBC and General Electric_

General Electric purchased RCA, and by extension NBC, in 1986 for $6.4 billion and the initial result was not good. When G.E. and its CEO, Jack Welch, bought NBC, the network was viewed, say insiders, as a new division in a giant company with the same responsibility as any other to show a return to the bottom line.

In news, G.E. reportedly had plans to grow the network's NewsChannel affiliate service to a point where ultimately some form of evening news program could be done from Charlotte, N.C., in a non-union environment.

At the same time, the news division was cut severely in what NBC veterans privately refer to as "the Long March." Staff and budget cuts hit the network news division and knocked it into third place. In his book "Three Blind Mice," Ken Auletta described a corporation ignorant of broadcasting and unfamiliar with the methods of building a network brand. The focus on the cost of things rather than their value seemed to reach its nadir when the network's new prime time magazine "Dateline" faked a news story about exploding G.M. pickup trucks.

The exploding pickup truck was a turning point, insiders recall. Reportedly, it persuaded top G.E. executives of the importance of a news division. One source close to NBC says Welch personally got complaints from fellow CEOs. Whatever occurred, changes began.

Andrew Lack was named president of news and the division began to rebuild. Lack hired Neal Shapiro from ABC to remake the magazine franchise and Jeff Gralnick from the same network to work with Tom Brokaw in rebuilding NBC's "Nightly News." He also committed $10 million for the street-front studio for "Today."

While the bottom line remained important, insiders say G.E. was now making available the money to rebuild, within corporate reason. From 1993 to 1996, the "Nightly News," "Today" and "Dateline" programs were reconceived. Under the new news management team, each of the programs became No. 1 in their time slots. They did so in part, the content analyses reveal, by leading the march toward softer coverage, yet they maintained their lead in recent years as nightly news became more serious again.

Even before this period began, the man in charge of NBC, Bob Wright, saw a niche for business news and persuaded G.E. to purchase FNN, a struggling financial cable news network, which became CNBC. It now returns to the bottom line reportedly in excess of $400 million a year.

Part of the concept behind the rebuilding was to spread the resources of the news division across multiple platforms, including MSNBC and MSNBC.com. (MSNBC was created with the infusion of money from Microsoft). The result is a diverse array of products that can share costs and sell advertising in combination, amortizing investments and making more use of correspondents and news resources. Lack, who received a lion's share of the credit for the rebuilding of NBC, was promoted to run the whole network, but that did not go well and he soon left the NBC altogether.
An open question now is whether his successors, led by the new NBC News president, Neil Shapiro, who used to run "Dateline," will have similar success. While often unknown to the public, the president of news, the history of network television suggests, is often (perhaps always) the critical figure in the health and integrity of a network's news division. At critical points in their histories, it has been enormously important that the news divisions were run by individuals with vision and the credentials to stand up to their network bosses - Roone Arledge at ABC, Reuven Frank at NBC and Richard Salant at CBS to name only a few.

Two news presidents have lost their jobs in television history for standing up to ownership. In the 1960s, Fred Friendly at CBS lost his job for protesting network decision to air reruns of "I Love Lucy" rather than coverage of Senate hearings concerning American involvement in Vietnam. In the 1980s, after G.E.’s purchase of NBC, the NBC news president, Lawrence Grossman, lost his job after fighting G.E.’s attempts to cut the news division.

Last year G.E. announced its plans to absorb the entertainment giant Vivendi/Universal. The merger would put a movie studio in G.E.’s hands and would give NBC "a relatively steady stream of content" that was less reliant on independent producers, according to one analyst. Other than the fact that entertainment would make up a larger part of G.E.’s media holdings, it may be hard to calculate the effect of the merger. Even combined, NBC-Universal would represent only a fraction of GE's total annual revenue of $130 billion.

**CBS and Viacom**

The effects of the Viacom-CBS merger are still difficult to know. Viacom's purchase of the network from Westinghouse for $46 billion in 2000 is still relatively recent. Perhaps more telling, Viacom has made fewer visible changes at the top of CBS news than G.E. and Disney did when they took over their networks.

In many ways, CBS is still recovering from the leadership of Lawrence Tisch, who "rescued" the network from a hostile takeover in 1986 and then slashed the news division, cutting loose 230 news employees and cutting the news budget by $30 million. Westinghouse, which came in and bought the network in 1995 and then sold it four years later, was little more than a temporary caretaker.

**News Sliver of the Pie Shrinks**

The end result of the wave of mergers is that the news divisions have become a much smaller sliver of their owners’ pies and thus much more likely to get lost in the big picture. They are more likely to become part of a homogenized whole, rather than a brand apart with a notably different mission than the rest of the parent companies. The nature of the owners is different as well.

Newspapers were, and to a large extent still are, owned by newspaper companies. Radio stations and magazines may not be owned by news companies, but they are still largely owned by media companies. Networks operate differently. Two of the big three networks that air nightly newscasts - ABC and NBC - are owned by companies that make most of their money in the world outside of media. (As noted above, a scant 6 percent of G.E.’s revenue comes from media ventures, according to calculations by Advertising Age magazine, while only 35 percent of Disney's revenues comes from its broadcast and cable holdings, of which news is a tiny part. More comes from theme parks and film studios. These companies have less of a history with the journalistic mission of serving the public interest than most media companies, and certainly less than most news media companies.)
In these environments the news divisions are having a harder time getting the investments they need to cover the news than they once did (see Newsroom Investment).

Barring a sudden change in ownership or these parent companies selling off their networks, it is hard to see how the situation will change.

**News Investment**

As viewers have left, the network news divisions have shrunk in size. And the priorities about where money goes have shifted. In the process so has the culture of network newsgathering. What once could be described as organizations with large battalions of experienced correspondents, producers, editors and camera crews stationed in bureaus worldwide might better be characterized today as organizations with a small pool of high-priced anchors supported by less experienced, less well-known, correspondents and off-air staffers who can parachute in from afar or assemble satellite footage in New York and cover anything.

Some trends:

- Staff cuts, some severe, have hit all of the big three news divisions, forcing a smaller number of correspondents to produce the same number or more stories.1

- Bureaus, particularly overseas, have been closed, giving the news organizations a smaller global footprint and fewer staff members with the understanding that comes from having correspondents immersed in foreign cultures.

- Many of the correspondents who have left are those with the longest experience and greatest expertise.

- The news hole for both morning and evening newscasts is shrinking as time for advertising grows.2

**Staffing**

A look at the average network newsroom is the most fundamental way to understand what has happened to investment in the newsroom. News staffs have shrunk markedly.

The number of correspondents featured on air during the average evening newscast has been cut by more than a third since the peak in 1985, from 76.7 to 50 in 2002, according to Joe Foote, a professor of journalism at Arizona State University. That is a drop of 35 percent.

And that reduction in staff has meant an increase in reporter workload. In 1985, reporters appearing in evening newscasts did an average of 31.4 stories a year. By 2002, that number had climbed to 40.9, according to Foote. Figures for other network staff (producers, cameramen, etc.) were not available, but reductions among them may be even greater due to technological changes.

**Average Network Newsroom Size and Reporter Workload**

1983 to 2002
The reductions should be understood in context. Some argue that the networks were bloated during the era of oligarchy, when the three nightly newscasts together shared 75 percent of viewers during the dinner hour. Too many people at the networks, critics said, had too little to do. It is almost certain that some bloat existed in such an environment.

Some of these reductions have also come as a result of new technologies that have increased productivity.

Yet cuts of more than one-third probably go beyond the efficiencies created by technology or trimming the unproductive employees. The casualties of these cuts are not just smaller, relatively unknown correspondents, or the underemployed, but some of the networks’ bigger names with the greatest expertise. Often these are people who would be most resistant to being shifted from a foreign bureau or specialized beat to a general assignment, but other times, these are simply people who didn’t want to take sizable pay cuts.

Whatever the reason, they reflect not just cutting costs but also a change in the nature of network coverage. Take away these reporters’ expertise and some diminishment in quality becomes unavoidable, network veterans argue.

Each of the networks has cut back on its beats as it has cut back on its correspondent staff, pushing more people into general assignment work. Most of the networks no longer have Supreme Court correspondents, for instance, but have instead just one correspondent who covers justice. Prior to the 2003 war in Iraq, the networks no longer had separate correspondents at the State Department and the Pentagon. Instead, they each had a single national security correspondent. Networks usually had both a science correspondent and a health correspondent. Now, it is more common, as is true at NBC, to have a merged science-health reporter, such as NBC’s Robert Bazell.

Some of the effects of these changes are difficult to quantify. Critics, however, suggest that the consequences reach farther than may meet the eye.

Where networks once assigned two or even three reporters to places such as Congress, the Pentagon and the State Department, the job is usually filled by one correspondent and less experienced off-air
staffers. On its face, not having duplicate reporters may seem like good sense. Some critics argue that without its bench, network coverage has become thinner. Another consequence, some network veterans say, is that when a major story develops and the networks "go live," the lone correspondent is often stuck for hours in front of the camera, his or her reporting confined to what can be gotten over the cell phone. Moreover, everything that has happened in front of the camera has occurred in the editorial structure of camera crews, producers, editors and researchers who are unseen.

Such consequences may be an unavoidable effect of declining audience, but they affect the product and may, in a vicious cycle, encourage still more viewers to turn away.

Bureaus

As they have let go of staff, the networks have also shrunken their presence in the world. Each of the networks once had about 15 bureaus abroad. They now have about half a dozen, or less. And in some cases, these bureaus are really just offices or are staffed largely by contract employees or virtually full-time freelancers.5

According to accounting by American Journalism Review, since the peak in the 1980s, ABC has closed seven foreign bureaus and now has six remaining. NBC has locked the doors in seven as well, also leaving six. CBS has done a bit less, closing only four, but that is because they had fewer to begin with. It, too, had six left, according to AJR, as of the summer of 2003.6

Other network veterans cite additional bureaus that have closed, including Johannesburg at ABC and Cairo and Beijing at NBC. Given the fact that bureaus open and close over the years, as changes in the news demand coverage from various regions for periods of time (as in Iraq), an exact accounting is difficult.

With the exception of one bureau in Nairobi at ABC, whose correspondent is a freelancer, the networks have no bureaus in Latin America, South America, Africa, India or Pakistan. ABC has no bureau anywhere in Eastern Europe or the former Soviet Union.

Asia is covered from Hong Kong. Europe and Eastern Europe is covered from London. Outside of temporary bureaus in Baghdad, the Middle East is covered from Tel Aviv or Jerusalem.

Current and Former International Network News Bureaus
Source: Lucinda Fleeson, "Bureau of missing bureaus," American Journalism Review; PEJ research.

<table>
<thead>
<tr>
<th>ABC 2003</th>
<th>ABC Closed</th>
<th>CBS 2003</th>
<th>CBS Closed</th>
<th>NBC 2003</th>
<th>NBC Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>Rome</td>
<td>London</td>
<td>Paris</td>
<td>London</td>
<td>Beirut</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>Beirut</td>
<td>Rome</td>
<td>Beijing</td>
<td>Tel Aviv</td>
<td>Johannesburg</td>
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<tr>
<td>Jerusalem</td>
<td>Bonn</td>
<td>Tokyo</td>
<td>Bonn</td>
<td>Hong Kong</td>
<td>Paris</td>
</tr>
<tr>
<td>Baghdad</td>
<td>Moscow</td>
<td>Tel Aviv</td>
<td>Johannesburg</td>
<td>Moscow</td>
<td>Frankfurt</td>
</tr>
<tr>
<td>Nairobi</td>
<td>Tokyo</td>
<td>Moscow</td>
<td>Baghdad</td>
<td>Baghdad</td>
<td>Berlin</td>
</tr>
<tr>
<td>Beijing</td>
<td>Cairo</td>
<td>Baghdad</td>
<td>Havana</td>
<td>Manila</td>
<td>Rome</td>
</tr>
<tr>
<td>Paris</td>
<td></td>
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</tr>
</tbody>
</table>
Not all of these bureau closings are purely economic. The closing of ABC's and NBC's Beirut bureau can be easily explained as a function of how the news environment has changed. The same argument could be made about the closing of ABC's and CBS's Bonn bureaus. However, since closing the Bonn bureaus in the capital of the former country of West Germany, neither network opened a bureau in Berlin, the new capital of unified Germany. NBC, which had bureaus in Bonn and Frankfurt, has also left Germany. And even though the Cold War is over, there is no shortage of news coming out of Russia. Still ABC decided to close its Moscow bureau. At the same time, ABC is the only network to have a bureau anywhere in Africa.

What does this say about the networks' international coverage? Basically, the nature of the coverage has fundamentally changed. Much of the network international coverage is actually camera work shot by freelancers mixed with voiceover from a correspondent at the nearest bureau. What is more, the content analysis found that little international coverage aired on the nightly newscasts or morning news in 2003 that was not directly related to U.S. policy. To some extent the same thing occurs in domestic coverage. Bureaus are expensive to run and can be difficult to manage. And networks argue that little is lost in the transition. The model still provides news from around the world, just in a different way.

The question is whether something is lost in the change. While freelancers can provide video footage and even reporting, the bureau system provided more than a reporter and a camera in a remote part of the world when news broke. It gave the networks a feel for the cultures and nations where they had correspondents. It gave them an institutional intelligence and an continuing sense of changing events. Even the choice of where to locate bureaus carried with it some intrinsic bias toward where the "important" international news would come from. Nevertheless, the bureaus at least left the networks more prepared cover news as it was bending, not just when it had broken, and to cover certain parts of the world in a sustained way, not just to parachute in and then leave.

Another factor is that the foreign bureaus were set up primarily to service the evening newscasts, not the morning programs. As the news divisions switched emphasis to the mornings, the domestic-to-overseas mix shifted accordingly.

On one hand, it would be a mistake, some network veterans caution, to give the old networks too much credit for the feel they had for distant cultures. The television networks never had as many bureaus as did The New York Times or even The Los Angeles Times, for instance.

Still, the decline in foreign bureaus raises another question that relates to the agenda-setting power of television. Network executives contend that the withdrawal from covering the globe, at least before September 11, was driven by viewer demand. Americans were no longer so interested in international events after the Cold War ended. The networks could cite ratings figures and, privately, suggested they had market research as well, to prove it. Critics of the networks, on the other hand, charge that the American public's declining interest in international affairs, at least before September 11, was driven in part by the news media, particularly television, pulling back on foreign news to save money. If Americans in the age of globalization were uninterested in events around the world, this sentiment goes, it was only because the news media were failing to make these events as relevant as they really were.

Which argument has more merit? Certainly some decline in interest in foreign affairs was inevitable and logical after the end of the Cold War. Yet the full explanation is probably more complex than that. In most cases, the closing of bureaus was generated by a mandate to cut costs, not simply to redeploy resources. Foreign bureaus are more expensive to run than others, so closing them yields more
savings. In addition, it is difficult for journalists to know in advance what audiences want. News by its nature is the unexpected, the unplanned, the new. Journalistic market research by its nature is soft.

Finally, to deny that the media have any agenda-setting power - that it merely reflects viewer interest and does not shape it - flies in the face of nearly all the social science research on the influence of television. The truth, in other words, is probably some combination of these factors. Television’s pullback from covering the world before September 11 may have reflected an American impulse. But it doubtless over time reinforced and intensified that impulse. And it had the advantage of helping the bottom line.

One last note: each of the networks lists Baghdad as the site of one of its bureaus. If and when the situation stabilizes in Iraq, one would expect those bureaus to close as well. If they close and no other new bureaus are created, the networks could each be left with five foreign bureaus apiece.

**News Hole**

As staffs get smaller and bureaus close, another change occurring in network news is that there is less of it. In both the morning and evening news time slots, the evidence suggests there are fewer minutes devoted to news in the newscasts.

Data from the researcher Andrew Tyndall show that the amount of time devoted to news -- as opposed to ads, promos and teasers -- on the half-hour network nightly news has shrunk 11 percent in 12 years, from 21 minutes in 1991, after the first Gulf War, to 18.7 minutes in 2002, on the eve of the second Gulf War. Extra time devoted to coverage of the September 11 attacks in 2001 accounts for the only anomaly in the downward trend.

**Average Time Devoted to News on Evening Newscasts**

1988 to 2002

<table>
<thead>
<tr>
<th>Year</th>
<th>Time (in Minutes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1988</td>
<td>21.0</td>
</tr>
<tr>
<td>1989</td>
<td>21.0</td>
</tr>
<tr>
<td>1990</td>
<td>21.0</td>
</tr>
<tr>
<td>1991</td>
<td>21.0</td>
</tr>
<tr>
<td>1992</td>
<td>20.6</td>
</tr>
<tr>
<td>1993</td>
<td>20.4</td>
</tr>
<tr>
<td>1994</td>
<td>20.1</td>
</tr>
<tr>
<td>1995</td>
<td>19.9</td>
</tr>
<tr>
<td>1996</td>
<td>19.6</td>
</tr>
<tr>
<td>1997</td>
<td>19.1</td>
</tr>
<tr>
<td>1998</td>
<td>19.0</td>
</tr>
</tbody>
</table>
1999  18.8
2000  18.8
2001  19.0
2002  18.7
2003  18.8

Source: Andrew Tyndall, unpublished data

More limited data also suggest a similarly pronounced shrinkage in the news hole of the morning news, where every hour contains on average two fewer minutes of programming over 10 years -- 44 minutes 10 seconds in 1992 versus 41 minutes 57 seconds in 2001, according to a study from the American Association of Advertising Agencies and the Association of National Advertisers. These figures are softer than the Tyndall data since the advertisers study tracks just one week of programming each year, rather than being a census of every broadcast, and there are fluctuations week to week. Still, it mirrors what has happened in the evening news and suggests that more than a minute of it went to commercials with another minute going to commercials, promos and public service announcements, or PSAs.

### Average Division of Time on Morning News
1992 to 2001

<table>
<thead>
<tr>
<th></th>
<th>Programming</th>
<th>Commercials</th>
<th>Promos/Credits</th>
<th>PSAs</th>
</tr>
</thead>
<tbody>
<tr>
<td>1992</td>
<td>44:10</td>
<td>13:49</td>
<td>1:49</td>
<td>0:12</td>
</tr>
<tr>
<td>1993</td>
<td>43:34</td>
<td>13:48</td>
<td>2:26</td>
<td>0:11</td>
</tr>
<tr>
<td>1995</td>
<td>43:40</td>
<td>13:29</td>
<td>2:22</td>
<td>0:29</td>
</tr>
<tr>
<td>1996</td>
<td>44:27</td>
<td>12:56</td>
<td>2:06</td>
<td>0:31</td>
</tr>
<tr>
<td>1997</td>
<td>44:01</td>
<td>13:20</td>
<td>2:13</td>
<td>0:26</td>
</tr>
<tr>
<td>1998</td>
<td>43:20</td>
<td>13:29</td>
<td>2:42</td>
<td>0:29</td>
</tr>
<tr>
<td>1999</td>
<td>42:28</td>
<td>14:49</td>
<td>2:18</td>
<td>0:25</td>
</tr>
<tr>
<td>2000</td>
<td>42:15</td>
<td>14:34</td>
<td>2:47</td>
<td>0:24</td>
</tr>
<tr>
<td>2001</td>
<td>41:57</td>
<td>14:57</td>
<td>2:42</td>
<td>0:24</td>
</tr>
</tbody>
</table>


The pros and cons of these changes are interesting to ponder. Giving up more of the news hole for promotions and ads clearly has an impact on the program, shrinking it and perhaps making it more irritating to the audience since it has more commercials and promos.

Yet that extra minute of ads per hour can mean extra money for the news divisions and the salaries of
the stars who populate them. The decision to sell off more of the newscast, in other words, is probably one that involves weighing short-term gain versus long-term cost and estimating the marginal impact on audiences. Will they notice? Will they care?

The changes add up fairly simply. Fewer people, based in fewer places, are filling more hours of news, although the size of the news hole in each of those programs is actually somewhat smaller.

The net effect is seen in the content. The networks have a harder time sustaining coverage of complex events. There are fewer specialists and beats. For instance, while the news agenda of network news changed sharply after September 11, 2001, that shift was not sustained in the first six months of 2002, when the nightly news returned partly to the same news topic agenda it had before the terrorist attacks. (see content). Even in the weeks following September 11, network executives said, the networks felt that they had excelled, but they had become exhausted. As one then-retired executive with close ties to one of the networks put it at the time, "they no longer had the bench" to do this kind of coverage for more than a few weeks.

A comparison of the size of the news hole with the average number of correspondents per newsroom shows that the number of on-air reporters per minute of news has basically remained constant. But as the charts show, the number of reporters is smaller than it was in 1988, but there is less time available for those correspondents’ stories.

On the one hand, with fewer viewers watching the traditional evening newscasts, one can argue that it makes sense for news divisions to shift resources away from nightly news and the areas of expertise needed for those programs, such as foreign bureaus.

On the other hand, one can also argue there is a question of chicken and egg. A smaller news hole, and thus a smaller and perhaps more limited program, may be one of the reasons viewership has declined.

Public Attitudes

The public's opinion of the network news divisions is similar to the feelings they have about the news media in general. They feel that news coverage by the networks is less accurate and that generally the networks are not doing as good a job they did 15 to 20 years ago. Some facts and figures:

- The number of people giving ABC, CBS or NBC news the highest mark for believability has fallen from roughly 32 percent in 1985 to 23 percent in 2002.¹
- Tom Brokaw is the most trusted anchorman, followed by Peter Jennings and then Dan Rather, mirroring the ratings for the three nightly newscasts.²
- From 1995 to 2002, the number of people giving Network News an A or B for overall news coverage remained relatively steady, but the number giving the networks a D or F increased.³

In addition to these numbers, surveys indicate that the networks are no longer the place viewers go when news is breaking. Increasingly they are turning to cable. A 2003 *TV Guide* poll found that viewers were more likely to name one of the cable networks as their source for breaking news; CNN was the choice of 31 percent of the public, "more than ABC (8.5 percent), NBC (11 percent) and CBS (6 percent) combined." Fox News came in second after CNN.⁴

The Anchor the Public Trusts
When it comes to a familiar face delivering the news, the networks still have the respect of viewers. According to surveys from *TV Guide*, all of the network's primary anchors scored even with or above the highest of their cable counterparts in overall trustworthiness.

The overall winner was NBC's Tom Brokaw, who was considered the most trusted anchor in news by 22 percent, according to the *TV Guide* poll. That number may reflect the fact that NBC is the ratings leader in the evening news time slot. While 22 percent may not sound large, consider that is in comparison to all anchors on the air - network or cable. In fact, Brokaw has a fairly sizable lead over his next nearest competitor. ABC's Peter Jennings and CBS's Dan Rather are in a virtual tie for second being most trusted by 17 percent and 16 percent, respectively.

Here too, however, there is reason for the networks to be concerned. Fox News's Shepard Smith, is essentially tied with Jennings and Rather with 16 percent citing him as the most trusted anchor. And Smith is viewed as most trusted by a wide majority among younger viewers 18 to 24 years old.

CNN's Aaron Brown was voted most trusted by 11 percent of viewers. Brian Williams, who has been identified to become the successor after the 2004 election to Tom Brokaw as anchor of the NBC "Nightly News," got the lowest marks with 4 percent.  

Paul Friedman, the former executive vice president of news for ABC, notes that over the years, exposure is an important part of what develops trust. Walter Cronkite was trusted in part, in other words, according to this thinking, because he sat in the anchor chair for so long. Time confers trust. Obviously, that alone is not enough. Dan Rather, the longest-sitting anchor, does not rank at the top of this list. Still, it is a factor, and cable anchors, with the number of hours they are on the air, get a lot of exposure.

**Weaker Coverage**

Getting away from the explicit question of "believability," the networks are no longer seen as even doing the best job in their news coverage. A survey conducted in summer 2001 by The Pew Research Center for the People and the Press found that 56 percent of the public graded the broadcast news divisions an A or a B for their overall news coverage. Cable news, by contrast, was given an A or B by 67 percent of the public. The numbers for network news have changed little from a poll that asked the same question in 1995, when 57 percent of the public gave network news an A or B.

**Grading the Network News Organizations**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>F</th>
<th>Can't Say</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network News, 1995</td>
<td>15</td>
<td>42</td>
<td>31</td>
<td>6</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Network News, 2002</td>
<td>18</td>
<td>38</td>
<td>26</td>
<td>10</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Pew Research Center

By many key traditional measures of journalistic quality - breadth of topics covered, comprehensiveness of sourcing, resources devoted to writing and editing - this study may lead people to conclude that the content of the networks' newscasts is superior to that of the cable networks. It is unclear whether people responding to the Pew surveys actually prefer the content of cable or like the convenience and immediacy of it and the fact that it comes from a source that is dedicated to the delivery of news and information exclusively.
Conclusion

The most immediate question about the future of network news concerns the anchors. At each of the three networks, the man occupying the anchor chair is near retirement. The first expected to leave, Tom Brokaw of NBC, is scheduled to step down after the November elections.

What will happen when a new generation of anchors, people who rose during the current, and less influential, era of network news takes over? Will it lead to an innovative re-imagining of the nightly news? Or will the retirements of the big three anchors mean a loss in prestige for the newscasts with audiences, largely older Americans, more comfortable with familiar faces?

Change, of course, has long been part of the story of news, for the networks and for the dissemination of information in general. But how the networks respond to this next shift will depend in part on how much the corporations that own the networks - General Electric, Viacom and Disney - want to be in the news business.

There are probably three ways to look at network news. It can be seen as something clearly quantifiable, a product that justifies its existence in current return to the bottom line. One can also have a more complicated and also skeptical view, that news is a cost of doing business but a bit of a headache, an obligation that viewers have come to expect that is something of a financial drag. Or one may have a more optimistic view, that news is a service that adds genuine if unquantifiable value - personality, credibility, a sense of public responsibility - that in turn translates into viewer loyalty, stronger affiliates, better ratings and a brand exportable to new product lines like the Internet.

All three viewpoints are defensible. In the end, they come down to the values of the owners, their vision of their business. Yet each shapes how much one is willing to invest in news and thus the business model for the future. The options are many.

The networks could keep their news largely a mass medium product, but likely a smaller one. This means producing programs mainly for their core broadcast channel, as they do now. In this vision, network news would likely continue to lose audience. That would probably translate into further cuts in the news division and a diminution in quality, which might further chase audience away. This is the easiest model to imagine.

The other networks also could follow NBC's example and create 24-hour news channels on cable to reach more audience and distribute use their resources more widely. Fox is approaching this in a smaller form with some network news programming in addition to its cable channel. ABC discussed the option with CNN before backing out. The concern is whether the cable universe is already too crowded.

The networks also could create even more paths for transmission, to more targeted and customized audiences. Imagine a newscast for MTV, another for Discovery, one for the History Channel, even in different languages. ABC and CBS executives have proffered plans along these lines, but were rebuffed by their companies. The news divisions also could go further into the business they offer local affiliates now, providing the news piecemeal, offering stories, newsbriefs and inserts for other channels to provide, a kind of supplemental television wire service for any outlet on television.

The biggest question for the networks may be what happens in the age of broadband, when the distinctions between cable and network television become less important. As the convergence of news technologies grows, there will almost certainly be more and deeper amounts of content available for those who want it. If people are getting television news on demand, on their phones and PDAs as well...
as their televisions, will the advantages cable has now - immediacy and convenience - mean as much as they do today? Or will the reporting and story-telling strengths of network news that viewers apparently still prefer on the occasions when network and cable compete head to head become more important?

Predictions about the future of news usually prove wrong. Some combination of options is likely. What probably matters more is whether the large corporations that control the networks now add more than incrementally to their current business model. If institutions that prevail in the future are entrepreneurial enough - with a vision, a willingness to invest and take risks - and the old networks die, a half-century of expertise, experience and credibility that are difficult to replace will go with them.

**Footnotes**

**Content Analysis**

1. The full programs were studied for the network evening news programs and the PBS "NewsHour." The first hour of the network morning news programs was studied. The 110 hours of programming encompassed more than 66 hours of editorial matter.

2. Lichter's research, for instance, finds that international coverage dropped from half the stories on nightly news in the early 1990s to as little as 20 percent of the stories in 1997. Environmental coverage dropped by 65 percent from 1990 to 1999. Entertainment coverage was up 28 percent from 1990 to 1999. Crime news was up 37.5 percent from 1990 to 1995, and, after declining at the end of the decade, again was still 45 percent higher in 2000 than a decade earlier.

3. These breakdowns were calculated by taking the total number of seconds devoted to each topic overall, dividing by 60 (seconds), and then dividing by 3 (thee commercial networks). This results in an average number of minutes on a commercial network over the course of 28 days.

4. Before 1963, network evening newscasts were 15 minutes long, not 30.

5. This difference also holds up if one looks at the percent of all stories as opposed to all time. More than half, 52 percent of all commercial network stories are edited packages, compared with 17% of stories on the "NewsHour."


**Audience**


7. "Internet Sapping Broadcast News Audience," Pew Research Center for the People and the Press, June 11, 2000, P. 1. In 1998, 59 percent of both Internet and non-Internet users reported watching nightly network news on a typical day. In 2000, the percentage of Internet users who regularly watched had dropped to 53 percent. In addition, the number of Internet users who reported watching at least a half-hour a day of network television news dropped from 48 percent in 1998 to 40 percent in 2000. Among non-Internet users, meanwhile, Pew found virtually no drop-off in the amount of time spent with network news.

8. According to data collected by the Census Bureau, the average commute in 2000 was 25.5 minutes, three minutes longer than in 1990, when the average commute was 22.4 minutes. By comparison, the change in commuting time between 1980 and 1990 was only 40 seconds (from 21.7 minutes to 22.4 minutes). See U.S. Census Bureau American Factfinder, "A Nation on the Move," 2003, and Federal Highway Administration, "Journey to Work Trends in the United States and Its Major Metropolitan Areas, 1960-1990," Table 2-2. Online: http://www.itsdocs fhwa dot gov/jpodocs/repts_te/6\w01\!.pdf.


10. Numerous on-air and off-air senior people in network news have aired this concern privately to the authors of this report over the years.

11. BIA data. The numbers also show a drop in late local news, after prime time. Late local news shows have seen their audience share drop from 57 to 48. The higher share numbers for late night news suggest that it is seen as more appealing than the alternative programming available at the time.


15. Nielsen Media Research unpublished data. Increasingly, television professionals have raised questions about the accuracy of ratings and viewership data, especially when the margins between rivals are close. In 2003, for instance, the networks thought changes in methodology were to blame for sudden drops in the number of adult males watching prime time programming. Nielsen Media Research issued a memo defending its methodology and suggesting that less network programming appealed to that demographic group. It is beyond the scope of this chapter to analyze the quality of Nielsen data. It is the industry standard, and in this case, all of the networks are evaluated by the same methodology.


17. Lisa Quan and Stephanie Spady, "Daypart briefings," Magna Global USA Media Insights, p. 11.

19. Interviews with authors.


21. In first week of the war, March 17-23, 2003, 32.2 million people watched the nightly news on average. The second week of the war, that of March 24-30, 29.5 million viewers tuned in; the following week, viewership stood at 27.9 million; and finally, in the week when American armed forces entered Baghdad and Saddam Hussein's statue was toppled, April 9th, 28.5 million viewers were watching.

22. The average number of households turned to cable news channels jumped from 3.3 million to 8.8 million. See *Cable World*, "Ratings," March 24, 2003; *Cable World*, "Ratings," March 31, 2003.


25. Associated Press weekly wire stories for 2003. The share of televisions in use tuned to the three newscasts declined slightly. For the week of March 9-15, the three newscasts together received a 43 share. For the week of March 16-22, the three newscasts received a 42 share. NBC gained a point of share, while ABC and CBS each dropped a point of share.


28. Lisa Quan and Stephanie Spady, "Daypart briefings," Magna Global USA Media Insights, pp. 2 and 11.

29. Ibid, pp. 1 and 10. For example, in fall 2003, the "Today" show on NBC received 2.6 ratings in the 25-54-year-old demographic and 3.9 ratings among those older than 50, while the NBC "Nightly News" received 2.8 ratings in the 25-54 demo and 8.4 in the 50+ demo.


32. Nielsen Media Research unpublished data.

33. Nielsen Media Research unpublished data.


35. The press made a fair amount of another turning point in 2003 in the rivalry between cable and the three networks. This was the year that the combined totals for cable channels supported by advertising (this does not include noncommercial premium channels such as HBO) surpassed the three broadcast networks in prime time viewers, according to the Cable Television Advertising Bureau, *Cable TV Fact Book*, "Long term total TV household share trends." (Online:
http://www.cabletvadbureau.com/). In the 2002-2003 season, commercial cable drew 41.3 percent of viewers. The Big Three networks accounted for 30.6 percent. All other viewing (including Fox, UPN, WB, PBS, independent stations and pay cable networks like HBO) received 28.1 percent of viewers.

A decade earlier, in the 1993-1994 season, the three networks accounted for 52.4 percent of all primetime viewership, while commercial cable had 21.3 percent. Pay cable and other broadcast networks accounted for the other 26.3 percent.

Economics

1. TNS Media Intelligence/CMR unpublished data, www.tnsmi-cmr.com; PEJ research.


3. PEJ research; TNS Media Intelligence/CMR unpublished data.

4. Interview with the former CBS correspondent Marvin Kalb by the author, Tom Rosenstiel, director of the Project for Excellence in Journalism.

5. TNS Media Intelligence/CMR unpublished data.


7. TNS Media Intelligence/CMR unpublished data; Nielsen Media Research unpublished data.

8. TNS Media Intelligence/CMR unpublished data.

9. TNS Media Intelligence/CMR unpublished data.


11. TNS Media Intelligence/CMR unpublished data; Nielsen Media Research unpublished data.

12. TNS Media Intelligence/CMR unpublished data.

13. TNS Media Intelligence/CMR unpublished data.

14. TNS Media Intelligence/CMR unpublished data.


16. CNN's morning show goes until 10 a.m.

17. In summer 2003, for example, the three morning cable programs (CNN's "American Morning," Fox News' "Fox & Friends," and MSNBC's "Imus in the Morning") drew just 2.3 million viewers all together. See Peter Johnson, "Fox wakes up morning TV," USA Today, August 17, 2003, online at http://www.usatoday.com/life/television/news/2003-08-17-fox-am_x.htm.


20. TNS Media Intelligence/CMR unpublished data.


Ownership


2. Advertising Age, 100 Leading Media Companies chart.

3. These figures include all revenues from television operations: network income, owned-and-operated stations revenue, revenue from syndicated programming and all other operations.


9. Advertising Age, 100 Leading Media Companies chart.

News Investment

1. Professor Joe Foote, Arizona State University (Tempe, Az.), unpublished data.


Public Attitudes


