

United States - Media Landscape

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Overview

The United States media landscape has been characterised by the centrality of large-scale cultural industries since the development of the penny press in the 1830s. For a while in the nineteenth century big urban newspapers were the largest

manufacturing companies in the country. This trend continued with the rise of Hollywood, commercial broadcasting and associated industries like music recording and advertising.

For a number of decades in the mid-twentieth century a fairly stable equilibrium existed in the media system, with strong stable markets that made the dominant media companies highly profitable and very influential as social institutions. Newspapers, broadcast companies and magazines all invested heavily in newsrooms and the profession of journalism grew in number, autonomy and influence. Journalism was characterised by a low level of "political parallelism," with the "objectivity norm" dominating journalistic ethics and most news organisations avoiding identification with particular political parties or tendencies.

In recent years many important elements of the stable system of the late twentieth century have been disrupted by economic, technological and political change. Stable boundaries that once separated markets have been disrupted by digital convergence and deregulation; and the landscape is increasingly dominated by cross-media conglomerates, including Google and Facebook. The latter two have always presented themselves as "tech" companies, not media enterprises. But their business model is based on selling audiences to advertisers, a market they now dominate, and they are central to the flow of information and public discourse. The role of the tech giants is increasingly the subject of debate, particularly since the scandals over fake news, Russian intervention, and related issues following the 2016 election. Besides these, the top companies include Disney (which owns broadcast network ABC); Comcast, a cable television giant which also owns the NBC and (Spanish-language) Telemundo networks; 21st Century Fox; Viacom; CBS; and Rupert Murdoch's News Corporation. AT&T, the telecommunications carrier which is the principal competitor to Comcast in delivering content to homes is bidding to buy Time-Warner, which would make it, like Comcast, a key player in both content and carriage.

The newspapers, broadcast networks and magazines that were the main institutional home for journalism have faced economic crisis and have downsized their newsrooms, often drastically. A host of new entrants to the market have emerged, mainly on-line, and the Internet has accelerated a trend that had already begun in increasingly fragmented broadcast industries toward the proliferation of hybrid forms of information and comment that blur the boundaries among journalism, politics, entertainment, public relations and activism.

In 2016, 57 percent of Americans said they often get news from TV, 38 percent online, 25 percent from radio and 20 percent from print newspapers. In terms of advertising revenue, in 2017 Internet-based media had the largest share. According to one estimate, Internet-based media accounted for 38.4 percent, Television 31.5 percent, Radio 8.1 percent, Newspapers 7.5 percent Consumer Magazines 7.4 percent and Other, 7.2 percent.

Political parallelism has increased, with many media in the fragmented markets of radio, cable news and digital media adopting strong partisan identities. The highest-circulation media still avoid such identities, but public attitudes toward the media are often sharply differentiated by political orientation, particularly since the 2016 election campaign, and patterns of media use increasingly so.

Journalistic professionalism is traditionally strong in the United States, and remains so at many of the core "legacy media" (whose audiences have generally expanded since Trump presidency began) as well as in many "net native" news media. However, journalists increasingly face pressures including more precarious jobs, greater pressure to generate audience engagement and revenue, political polarisation and decreased public trust. Surveys have shown that, while 60 percent of journalists in the 1970s-1980s said they had "almost complete freedom" in selecting stories, by 2013 only 34 percent reported such freedom. The boundaries of the profession are also increasingly blurred by the proliferation of communicators with a wide range of values and goals, including partisan commentators, citizen journalists, various new infotainment platforms, etc. Also, professional journalists no longer have the centrality as "gatekeepers" of the flow of information they once had.

The state has generally played a limited role in the US media systems, compared with other parts of the world, a result of the combined influence of the First Amendment legal tradition and the centrality of free market liberalism. Press subsidies and forms of intervention have existed in certain periods, particularly early in the history of the press. But public service broadcasting has always been marginal, and many forms of regulation and support that are found in other developed capitalist democracies are absent.

Public broadcasting in the US consists of two national networks, the PBS (Public Broadcasting System) television network and the NPR (National Public Radio) network, together with local stations which are their members, a bit fewer than 1,000 in the case of NPR. The Corporation for Public Broadcasting is a non-profit corporation funded by the Federal government which channels the Federal investment in public broadcasting through grants. The majority of revenue for public broadcasting comes from donations from members (about 2.1 million people nationwide in 2015) and other private gifts, sponsorship by businesses and nonprofits (with sponsors getting on-air publicity in recognition) and foundation grants. Support from Federal, State and local government provides a limited part of their funding.

Media

Print

Because of the size of the country, the newspaper industry the United States has been primarily local in character. There are three major national newspapers: *USA Today*, *The Wall Street Journal*, and the national edition of *The New York Times*. The others—1,331 daily newspapers in 2014, down by about 100 from a decade earlier—are metropolitan and local newspapers; among the most important are the *Los Angeles Times*, *The Washington Post*, the *Chicago Tribune*, and the two New York tabloids, the *Post* and *Daily News*. Many newspapers are part of chains that own many newspapers, and there is a general trend toward consolidation of ownership. The largest chain is Gannett, the publisher of *USA Today*, which owns more than 100 daily newspapers.

Newspaper circulations in the United States peaked in the late 1950s, remained more or less stable during the 60s and 70s, and then entered a period of significant decline in about 1990. Though newspaper circulation overall has continued to decline in recent years, some of the most important newspapers have had circulation gains, primarily in digital subscriptions, including *The New York Times*, which had 2.5 million digital-only subscribers in 2017, *The Wall Street Journal* and *The Washington Post*, which is becoming more national in readership.

The economic state of newspapers in the US has been more dire than the state of their audience. US newspapers have historically depended more on advertising than circulation revenue, with the share of advertising reaching 80 percent of revenue in some periods. As advertising has shifted online, particularly after the 2009 recession, newspapers have been hit hard. Between 2006 and 2016 total newspaper industry revenue declined from \$49 billion to \$18 billion. This has led to an acceleration of a downward trend in the size of reporting staffs that had begun earlier. Newsroom employment in daily newspapers peaked in 1990 at 56,900, and by 2014 had declined to 32,900.

There has been a trend in recent years where important newspapers that are on shaky financial footing are being purchased by billionaires who can afford to keep them alive. Important cases include the purchase of *The Washington Post* by Amazon founder Jeff Bezos, of the *Las Vegas Review-Journal* by casino mogul Sheldon Adelson, and of the *Los Angeles Times* and *San Diego Union-Tribune*

by biotech entrepreneur Patrick Soon-Shiong. This has stabilised some newspapers financially, but led to concerns about the influence of owners on content. Adelson, in particular, is highly involved in politics, and all have economic interests affected by public policy.

News magazines were at one time a central element of the US media landscape but have declined considerably. Those declines have slowed in recent years, however. The top news magazines—about fifteen are important nationally—have circulations a bit under 1 million and do still have a significant role in public discussion. There are also many lifestyle and special interest magazines, with much higher circulation than news and opinion magazines, led by such titles as *Better Homes and Gardens* and *People*.

Radio

There are hundreds of commercial radio stations in the United States, many belonging to large chains, since the Federal Communication Commission relaxed rules on the number of stations a particular company could own. The top ten companies account for about 50 percent of revenue; the top three are iHeart Media, with 862 stations, CBS with 117 and Cumulus Media with 449. Most emphasize music and have little news or discussion of public affairs. About 10 percent of listeners tune to "news/talk" formats at any given time of day, however. Talk radio is often highly partisan, and it was in talk radio that the reemergence of partisan media began in the US. The top-rated radio talk shows are conservative shows, including *The Rush Limbaugh Show* and *The Sean Hannity Show*, and have audiences around 13-14 million daily.

National Public Radio has gained audience particularly since the 2016 election, with its flagship news broadcasts drawing about 14-15 million listeners daily, making them among the most significant news broadcasts nationally. NPR has also had success with a new market in podcasts, with several million people a year downloading its podcasts.

Television

Television remains extremely important in the United States, even if it is challenged by new media. It remains the most important source of news for Americans, with 50 percent saying they often get news from television, still higher than online sources, though the latter are gaining.

The television industry is complex. The national broadcast networks are the heart of the system, and still play a central, though diminishing role. The most important are ABC, CBS, NBC, Fox and Univisión. The latter is one of two national Spanish-language networks, and at times exceeds some of the English-language networks in audience ratings. (Univisión is the largest of many "ethnic" media that exist in all forms of media in the US. Other ethnic media with relatively large audiences include Spanish-language radio stations in many regions, African-American magazines, and the Black Entertainment Television cable channel).

Another component of the system is the local stations, some of which are owned by the national networks and some by other media companies. Most have their own news broadcasts, and collectively local TV stations are the largest source of news for Americans. As with radio, concentration of ownership has grown considerably in this sector in recent years, with the five largest companies (Sinclair, Nexstar, Gray, Tegna and Tribune), increasing the number of stations they owned from 179 in 2004 to 443 in 2016. A third component is cable; in terms of news, the dominant players in cable news are Fox News, CNN and MSNBC. Fox and MSNBC are known for their strong partisan and ideological identities.

Finally, as audience has shifted to digital video, often watched on mobile screens, other players have become increasingly important and have begun to produce their own programming, including Netflix, Apple, Hulu and Amazon.

In 2016, 46 percent of Americans said they often got news from local TV, 31 percent from cable news and 30 percent from national broadcast news. The flagship broadcasts of the national networks have audiences of about 7-10 million viewers nightly, the top cable news broadcasts have audiences a bit under 3 million daily, and Univision's flagship broadcast has an audience of a bit under 2 million daily.

Digital Media

Internet-based media took the largest share of advertising revenue in 2017, 38.4 percent of the total (not counting digital ad revenue for other media). Google and Facebook dominate the digital advertising market, with 60 percent of the ad revenue. Their share is growing, expected by some accounts to rise to 85 percent in 2018.

In terms of news, all major US news organisations now have extensive digital operations, producing content both for online and for their traditional platforms, hiring social media editors to push content into social media and, in the case of many major newspapers, often emphasizing digital subscriptions as a source of growth. Many Internet-native news organisations have also been created, and these take many forms. Some are similar to traditional news organisations, though often with narrower target audiences than the established legacy media. These include organisations like Politico.com, and also many local news operations, which are often non-profit enterprises—for example Voiceofsandiego.org. Some are more activist in character, with strong political agendas, like Breitbart.com, which played a key role in the Trump campaign, and, on the political left, Altnet.org. One effect of digital news circulation is that international media now have significant audiences in the US, including the *Guardian*, the BBC, and the *Daily Mail*. In August, 2017, according to one ranking, the top ten news websites by unique monthly visitors were:

1. CNN
2. The New York Times
3. Yahoo News (an aggregator, though with some original content)
4. The Washington Post
5. Fox News
6. BuzzFeed (Internet native)
7. USA Today
8. Yahoo Finance
9. Business Insider
10. Forbes

Social Networks

In terms of time spent on any media, social media are second after television, with Youtube, Facebook, Snapchat, Instagram and Twitter leading in usage. About two thirds of Americans get some news on social media, and many news organisations produce news specifically for social media sites, often entering into partnership with social media companies to facilitate this. Facebook is by far the most important in the flow of news, with 45 percent of the population getting some news on the site in 2017, followed by Youtube (18 percent), Twitter (11 percent), Instagram (7 percent) Snapchat (5 percent), LinkedIn (5 percent) and Reddit (4 percent). Social media are important vehicles for political communication as well, with President Trump's Tweets driving much news coverage and political discussion. Facebook's dominance as a means by which increasing parts of the audience access news has led many media to attempt to work with them, and Facebook has programs

to facilitate this. After it introduced Facebook Live, for example, for about a year it offered subsidies to some media companies to produce content for the platform. These kinds of arrangements with Facebook have not, however, been particularly successful for many media companies; Mashable and BuzzFeed, for example, which were particularly active producing content for Facebook, have not been immune from the trend toward downsizing. At the beginning of 2018 Facebook announced changes in its algorithm that are likely to de-emphasize news content, and it is possible that in the long run Facebook will not prove a reliable way for news organisations to reach audiences.

Opinion Makers

The United States public sphere is extremely complex, with many opinion makers, and in the current media system most of them reach subsets of the population rather than the mass public as a whole. Cable television commentators such as Sean Hannity of Fox News and Rachel Maddow of MSNBC, for example, have relatively large influence, but their audiences are small minorities of the mass public, on the political right and left, respectively. If we look at the most-followed Twitter accounts in the United States, most belong to popular music or entertainment celebrities. Others high on the list include, in order, former President Barack Obama, television talk show host Ellen deGeneres, President Donald J. Trump, Microsoft Chairman Bill Gates, television talk show host Oprah Winfrey, The New York Times, and basketball player LeBron James.

Sources

Newspapers

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- [Gannett](#)
- [Los Angeles Times](#)
- [New York Daily News](#)
- [New York Post](#)
- [New York Times](#)
- [USA Today](#)
- [Wall Street Journal](#)
- [Washington Post](#)

News Magazines

- [Time](#)
- [The New Yorker](#)
- [Bloomberg Businessweek](#)

Television

- [ABC](#)
- [CBS](#)
- [Fox News](#)
- [MSNBC](#)
- [NBC](#)
- [PBS](#)
- [Sinclair Broadcast Group](#)
- [Univisión](#)

Radio

- [iHeartRadio](#)
- [NPR](#)
- [The Rush Limbaugh Show](#)

Digital Media

- [Altnet](#)
- [Breitbart News Network](#)
- [BuzzFeed](#)
- [HuffPost](#)
- [Politico](#)
- [Yahoo News](#)

Organisations

Trade Unions

The most important union for print journalists is the NewsGuild, which represents about 25,000 news workers, including those in some top digital news outlets. Television news professionals are generally represented by the Screen Actors Guild-American Federation of Radio and Television Artists (SAG-AFTRA), which also represents actors and other professionals in the broadcasting and film industries.

Journalist Associations

The Society of Professional Journalists (SPJ) has about 9,000 members and promotes journalistic professionalism, advocates for press freedom, etc. The American Society of News Editors (ASNE) was founded in 1922 as the American Society of Newspaper Editors, and has played a central role over the years in the development of professional ethics and culture. There is also an American Society of Magazine Editors (ASME). Other Associations represent journalists with particular specialisations, like investigative reporters or health journalists, and groups like Latino journalists and Black journalists.

News Agencies

The Associated Press was formed in 1846 as a non-profit cooperative owned by member news organisations, and has an extensive network of journalists worldwide. Bloomberg News is an important commercial news agency specializing in business news. Many news organisations also have news services through which they distribute content to other media.

Audience measurement organisations

The Alliance for Audited Media, created in its original form by the advertising industry in 1914, is the most important organisation verifying print media audiences. Nielsen Media Research is the best-known producer of broadcast ratings, and has expanded into on-line media. ComScore is another important audience measurement firm, particularly for digital media.

Sources

Trade Unions

- [NewsGuild-CWA](#)
- [Screen Actors Guild and the American Federation of Television and Radio Artists](#) (SAG-AFTRA)

Journalist Associations

- [American Society of Magazine Editors](#) (ASME)
- [American Society of News Editors](#) (ASNE)
- [Investigative Reporters and Editors](#) (IRE)
- [National Association of Black Journalists](#) (NABJ)
- [National Association of Hispanic Journalists](#) (NAHJ)
- [Society of Professional Journalists](#) (SPJ)

News Agencies

- [Associated Press](#)
- [Bloomberg](#)

Audience Measurement Organisations

- [Alliance for Audited Media](#)
- [comScore](#)
- [Nielsen Research](#)

Policies

Media legislation

The First Amendment to the United States Constitution and various decisions of the Supreme Court interpreting it are

fundamental to the legal framework, and limit many kinds of media regulation that exist in other countries, for example regarding hate speech or election campaigns. For broadcasting, two pieces of legislation are central, the Communications Act of 1934 and the Telecommunications Act of 1996. The Communications Act set up the so-called “trusteeship model” of broadcast regulation, which granted licenses mainly to commercial enterprises, but required them to use the airwaves in a way consistent with the “public convenience and necessity,” and required periodic license renewals. This structure still exists in principle, but with deregulation starting in the 1980s, the license renewal process became essentially a formality. There are also laws specifically governing cable television, the most recent being the Cable Television Consumer Protection and Competition Act of 1992. Libel or defamation laws, as well as privacy laws, are primarily defined at the State level, though subject to review by the Federal courts. About 30 states have passed “shield laws” giving some protection to journalists for sources and other confidential information. There is no Federal shield law. The Freedom of Information Act, which went into effect in 1967, gives citizens rights of access to information produced by the Federal government and creates procedures for requesting information. It is used extensively by journalists, particularly for investigative reporting. States also have such laws, which vary in their effectiveness and provisions.

The Federal Election Campaign Act of 1971 established rules governing the financing of Federal election campaigns, though these were weakened in important ways by the Supreme Court in 2010.

Accountability systems

The United States has no press councils. Accountability of broadcast license-holders is the responsibility of the Federal Communication Commission, though it is weak in the current period, when the license-renewal process no longer provides significant opportunity to contest licenses.

Regulatory authorities

The regulatory authority for broadcasting and telecommunication is the Federal Communication System (FCC). It has five Commissioners, appointed by the President and confirmed by the Senate. Those appointments are partisan, and the law specifies that no more than three can be from a single party. The FCC is an independent regulatory agency, which means that although the Commissioners appointed by the President, their role is to apply the law, not to implement policies determined by the President, as with other Departments of the Federal government. Its policies do vary with the partisan composition of the Commission, though this tendency is limited by the fact that any decision of the Commission is subject to review by the courts. The FCC has been at the center of many important policy issues that have provoked widespread public debate in recent years, particularly over “net neutrality” and the related question of whether Internet service providers should be considered as telecommunication carriers and hence regulated as public utilities.

The Antitrust Division of the Justice Department is responsible for enforcement of laws related to market concentration, and typically reviews media mergers and acquisitions, which it has the authority to challenge in the courts.

The Federal Trade Commission (FTC) regulates general consumer advertising; and the Food and Drug Administration (FDA) regulates pharmaceutical advertising, which is legal in the United States.

The Federal Elections Commission (FEC) enforces laws related to financing and expenditure in election campaigns.

Sources

- [Antitrust Division of the Justice Department](#)
- [Corporation for Public Broadcasting](#) (CPB)

- [Federal Communications Commission](#) (FCC)
- [Federal Election Commission](#) (FEC)
- [Federal Trade Commission](#) (FTC)
- [Food and Drug Administration](#) (FDA)
- [Freedom of Information Act](#) (FOIA)
- [FTC Division of Advertising Practices](#)

Education

Universities and schools

Hundreds of colleges and universities in the United States offer degrees in journalism or related fields. Journalists in the United States have a wide range of educational backgrounds; according to a 2013 survey 46 percent had degrees in journalism or communication.

Professional development

The current period is characterised by considerable instability in US journalism, in contrast with the relative stability of an earlier era. The primary manifestation of this instability is the lack of job security that many journalists feel, and the shift toward many journalists becoming "permalancers"—permanent freelancers—and many working for piece rates (something that was common in the 19th century). Even those who are able to maintain steady employment often find that the demands of the job, and the kinds of skills needed, shift frequently, as news managements experiments with new strategies—emphasizing video, for example, or production for particular social media formats—only to drop those experiments after a brief time.

Sources

- [Association for Education in Journalism and Mass Communication](#)
- [Broadcast Education Association](#)

Conclusions

Conclusion

The United States media system has entered a period of intense change: the number of channels, and thus of competitors, is multiplying; the boundaries between media sectors are blurring; and economic resources and power over the flow of information are shifting into the hands of the tech giants. The business models of the legacy media that have sustained

professional journalism have become weak, and journalism has entered a period of instability and insecurity. The rise of politicised media, particularly on the populist political right, has challenged the traditional non-aligned or centrist stance of most news organisations, and trust in news organisations has declined and become more dependent on political partisanship, even if the highest-circulation media still avoid strong partisan identities. Immediately after the election victory of Donald Trump, many speculated that legacy media and the kind of journalistic professionalism associated with them might dramatically decline, but they have to some extent rebounded, with many of the most important national news organisations gaining audience and maintaining strong importance in the public sphere, albeit not with the dominance they enjoyed at the height of their influence.

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