Glance at some items in the news of late and it seems many long-held ideas about journalism are unraveling.

President George Bush told ABC’s Diane Sawyer in December that he prefers to get his news not from journalists but from people he trusts, who “give me the actual news” and “who don’t editorialize.” After spending time with White House senior staff, New Yorker writer Ken Auletta concluded they saw the news media as just another special interest group with an agenda—and that is making money, not serving the public.

Some argue that as Americans move online, the notion of news consumers is giving way to something called “pro-sumers,” in which citizens simultaneously function as consumers, editors, and producers of a new kind of news in which journalistic accounts are but one element.

With audiences now fragmented across hundreds of outlets with varying standards and agendas, others say the notions of a common public understanding, a common language and a common public square are disappearing.

For some, these are all healthy signals of the end of oligarchical control over news. For others, these are harbingers of chaos, of unchecked spin and innuendo replacing the role of journalists as gatekeepers over what is fact, what is false and what is propaganda. Whichever view one prefers, it seems everything is changing.

Or is it?

The answer we arrive at in 2004 is that journalism is in the middle of an epochal transformation, as momentous probably as the invention of the telegraph or television.

Journalism, however, is not becoming irrelevant. It is becoming more complex. What we are witnessing are the dichotomous trends of fragmentation and convergence simultaneously, and they sometimes lead in opposite directions.

While audiences are fragmenting, we have greater capacity than ever to come together as a nation in an instant—for September 11th, the Super Bowl or watching soldiers live on the battlefield in Iraq. While Americans are turning to more and varied sources for news, the media they're consuming increasingly tend to be owned by a few giant conglomerates competing to cover what seem to be at any moment only a handful of major stories.

Quality news and information are more available than ever before. Yet so in greater amounts are the trivial, the one-sided and the false. Some people will likely become better informed than they once could have been as they drill down to
original sources. Other consumers may become steeped in the sensational and diverting. Still others may move toward an older form of media consumption—a journalism of affirmation—in which they seek news largely to confirm their preconceived view of the world.

The journalists’ role as intermediary, editor, verifier and synthesizer is weakening, and citizens do have more power to be proactive with the news. But most people will likely do so only episodically. And the proliferation of the false and misleading makes the demand for the journalist as referee, watchdog, and interpreter all the greater.

These conflicting movements toward fragmentation and convergence are not new to the culture in general or media in particular, but they have different consequences when they come to news. Journalism is how people learn about the world beyond their direct experiences. As our journalism fragments, it has consequences for what we know, how we are connected and our ability to solve problems.

Eight Major Trends

For now, the year 2004, the transformation is shaped by eight overarching trends:

■ A growing number of news outlets are chasing a relatively static or even shrinking audience for news. One result of this is that most sectors of the news media today are losing audience. That audience decline, in turn, is putting pressures on revenues and profits, which leads to a cascade of other implications. The only sectors seeing general audience growth today are online, ethnic and alternative media. While English-language newspapers have seen circulation decline steadily since 1990, for instance, Spanish-language newspapers have seen circulation more than triple to 1.7 million papers a day. All three of these growing sectors share the same strength—the opportunity for audiences to select tailored content, and in the case of the Internet, to do so on demand.

■ Much of the new investment in journalism today—much of the information revolution generally—is in disseminating the news, not in collecting it. Most sectors of the media are cutting back in the newsroom, both in terms of staff and the time they have to gather and report the news. While there are exceptions, in general journalists face real pressures trying to maintain quality.

■ In many parts of the news media, we are increasingly getting the raw elements of news as the end product. This is particularly true in the newer, 24-hour media. In cable and online, there is a tendency toward a jumbled, chaotic, partial quality in some reports, without much synthesis or even the ordering of the information. There is also a great deal of effort, particularly on cable news, put into delivering essentially the same news repetitively without any meaningful updating.

■ Journalistic standards now vary even inside a single news organization. Companies are trying to reassemble and deliver to advertisers a mass audience for news not in one place, but across different programs, products, and platforms. To do so, some are varying their news agenda, their rules on separating advertising from news, and even their ethical standards. What will air on an MSNBC talk show on cable might not meet the standards of NBC News on broadcast, and the way that advertising intermingles with news stories on many newspaper web sites would never be allowed in print. Even the way
Many traditional media are maintaining their profitability by focusing on costs, including cutting back on their newsrooms.

a TV network treats news on a prime time magazine versus a morning show or evening newscast can vary widely. This makes projecting a consistent sense of identity and brand more difficult. It also may reinforce the public perception evident in various polls that the news media lack professionalism and are motivated by financial and self-aggrandizing motives rather than the public interest.

- Without investing in building new audiences, the long-term scenario for many traditional news outlets seems problematic. Many traditional media are maintaining their profitability by focusing on costs, including cutting back on their newsrooms. Our study shows general increases in journalist workload, declines in numbers of reporters, shrinking space in newscasts to make more room for ads and promotions, and in various ways that are measurable, thinning product. This raises questions about the long term. How long can news organizations keep increasing what they charge advertisers to reach a smaller audience? If they maintain profits by cutting costs, social science research on media suggests they will accelerate their audience loss.

- Convergence seems more inevitable and potentially less threatening to journalists than it may have seemed a few years ago. At least for now, online journalism appears to be leading more to convergence with older media rather than replacement of it. When you look closely at audience trends, one cannot escape the sense that we are heading toward a situation, especially at the national level, in which institutions that were once in different media, such as CBS and the Washington Post, will be direct competitors on a single primary field of battle—online. The idea that the medium is the message increasingly will be passé. This is an exciting possibility that offers the potential of new audiences, new ways of storytelling, more immediacy, and more citizen involvement.

- The biggest question mark may not be technological but economic. While journalistically online appears to represent opportunity for old media rather than simply cannibalization, the bigger issue may be financial. If online proves to be a less useful medium for subscription fees or advertising, will it provide as strong an economic foundation for newsgathering as TV and newspapers have? If not, the move to the web may lead to a general decline in the scope and quality of American journalism, not because the medium isn’t suited for news, but because it isn’t suited to the kind of profits that underwrite newsgathering.

- Those who would manipulate the press and public appear to be gaining leverage over the journalists who cover them. Several factors point in this direction. One is simple supply and demand. As more outlets compete for their information, it becomes a seller’s market for information. Another is workload. The content analysis of the 24-hour-news outlets suggests their stories contain fewer sources. The
increased leverage enjoyed by news sources already encouraged a new kind of checkbook journalism in 2003, as seen in the controversies over TV networks trying to secure interviews with singer Michael Jackson and soldier Jessica Lynch.

**Background on This Report**

These are some of the conclusions from what we hope is an unprecedented, comprehensive new study of the state of American journalism.

For each of the media sectors, we examined six different areas—content, audience trends, economics, ownership, newsroom investment and public attitudes. We aggregated as much publicly available data as is possible in one place and for six of the sectors, the Project also conducted an original content analysis. (For local television news, we relied on five years of content analysis the Project had previously conducted. For radio, ethnic and alternative media, no special content analysis was conducted.)

This approach of trying to look for cross-media trends, we believe, differs from the conventional way in which American journalism is analyzed. It is designed to gather in one place data usually scattered across different venues from different sources. Our hope is that this will allow us and others to develop insights not usually possible and make comparisons that are usually difficult.

For this executive summary, we have distilled the findings into highlights. The goal is to provide a quick scan of key trends.

If people go online for the full report, they will find something much more substantial. The full study contains a complete introductory overview about the news media and detailed narratives on each major media sector. The complete report runs more than 500 pages in print and includes extensive tabular appendices. There are more than 400 detailed, footnoted source citations to help guide users to original sources.

People can approach the material in that full report several ways. Users can go directly to the media about which they are most concerned—say local TV news—and drive vertically through it. Or they can focus on a particular issue—audience trends for example—and move horizontally across different media sectors to see where Americans are going for news. Or they can move across the overviews of each sector. They can flip back and forth between our narrative and the interactive chart and tabular material. Or they can work through the statistics for themselves, making their own charts, answering their own questions, in effect creating their own reports.

Our desire in this study is to answer questions we imagine any reader would find important, to help clarify the strengths and weaknesses of the available data, and to identify what is not yet answerable.

We have tried to be as transparent as possible about sources and methods, and to make it clear when we are laying out data versus when we have moved into analysis of that data.

We have attempted, to the best of our ability and the limits of time, to seek out multiple sources of information for comparison where they exist. Each year we hope to gather more sources, improve our understanding and refine our methodology.

This annual report was designed with various audiences in mind—citizens, journalists, media executives, financial analysts, scholars, students and most important, citizens. We hope it proves useful now and throughout the year for anyone interested in American journalism.