Local TV News & Service Agreements: A Critical Look

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Abstract

Since 2000 there has been an increasing proportion of media markets in which individual stations have entered into agreements with varying levels of cooperation. These agreements are known, depending on their conditions, as shared services (SSA) agreements, local marketing/ management (LMA) agreements or local news sharing (LNS) agreements. Purportedly, these agreements are expected to help relieve some of the economic burdens that are shouldered by local stations in gathering and presenting news content. The implementation of these joint agreements, whether they involve simply sharing video to sharing news-gathering resources to overall management of the station, has implications for each of the fundamental principles on which the Federal Communications Commission regulates the broadcast industry---diversity, competition and localism. That is especially important now because the FCC is in the process of making decisions about media ownership that it postponed from 2010.

It is uncertain what impact these agreements have on the overall content of local news in markets with stations that have adopted this practice. But there are critical questions about these arrangements that must be examined. We have done so in this research by conducting a content analysis of the newscasts in eight television markets in which there is, at least, one of these types of agreements in operation. Do the stations that made these arrangements function as separate entities? What is the amount of local news that is presented on local broadcasts? What topics are covered? What production techniques are used to present the news? What resources do the stations within these agreements share? How do the stations within the agreements and those outside of the agreements in television markets compare across these dimensions? What might these arrangements mean for the consideration of media ownership regulation?

This research represents the largest examination of this phenomenon to date and it is intended to provide a baseline picture for the public and for the policy-making process of the Federal Communications Commission.

Contents

Introduction

Local television news remains the critical news source of information for the American public about their localities. Even in the age of the Internet, almost eight of ten Americans get their news from a local television station (Waldman, 2011). Indeed, the Federal Communications Commission's (FCC) seminal study of the information needs of communities concluded that, "In many ways, local TV news is more important than ever" (Waldman, 2011, p. 13).

The importance of local television as a news source is evident. The Pew Research Center for the People and the Press found that almost two-thirds (64%) of the public identified local television news as their dominant local news source (Pew, 2009). That compares to newspapers at 41 percent and the Internet that registers as the most important local news sources for less than one-fifth (17%) of the public.

TV Is Dominant Source for National and Local News

	Where do you get most of your…	
	National/Intrnl news	Local news
	%	%
Television	71	64
Internet	42	17
Newspapers	33	41
Radio	21	18

Rows add to more that 100% because of multiple responses.
Source: Pew Research Center for the People and the Press Survey Report, September 13, 2009.

Further, the public sees local television news as the most important source for uncovering local stories.

Who does the most to uncover local stories?

	%
Local TV stations	44
Local newspapers	25
News websites	11
Local radios stations	10
Multiple/DK	9
Total	*100*

Source: Pew Research Center for the People and the Press Survey Report, September 13, 2009.

According to the Federal Communications Commission's Notice of Inquiry for the 2010 Quadrennial Review of Broadcast Ownership Rules (NOI), there were 1,130 commercial television stations with 450 owners in 1996. In 2010, there are 1,302 commercial television stations and 303 owners, representing a 33 percent drop in the number of owners (FCC, 2010). In addition, the FCC reports that there are 175 television station duopolies, which include owners with "attributable local marketing agreements" in the 210 Nielsen television markets (FCC, 2010, p. 3). These agreements (variously known as local marketing agreements, shared services agreements, joint service agreements or local news sharing agreements, depending on the level of consolidation of activities) are arrangements among stations in the same television market in which they share news-gathering resources, video, and/or marketing and management activities.

The Georgetown University Law Center identifies a Joint Sales Agreement ("JSA") as a contractual agreement between same-market broadcasters to sell advertising time in exchange for a flat fee or percentage of ad revenue. JSAs authorize a brokering station to sell some or all of the brokered station's advertising time and in effect shoulder all market risk. The Commission's attribution rules recognize JSAs between same-market broadcasters as threatening competition and diversity in local markets. Additionally, JSAs sometimes operate under different names, such as "ARAs" or "LSAs," Advertising Representation Agreements and Local Sales Agreements, respectively. JSA-like arrangements also appear as provisions in other contractual agreements, such as "SSAs" and "LMAs," Shared Services Agreements (brokered operations) and Local Marketing Agreements (brokered programming), respectively. The brokered operations of Shared Services Agreements (SSAs) represent the most complete cooperation among the stations because they most often include the production of news by one station for the other stations. Most often, this includes sharing the same newsroom and website.

As of the writing of this monograph, the FCC does not have a definitive list of the stations that have entered into services agreements (for our purposes I will include shared services agreements, joint services agreements, and local marketing/news sharing agreements under this term). In fact, there is no central database that tracks these arrangements. Therefore, there is not a definitive list of the Designated Market Areas DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License) where the phenomenon is present. Our own efforts have identified, at least, 45 DMAs® (DMA® is a registered service mark of The Nielsen Company. Used under License) in which these agreements are operative. However, the American Cable Association (ACA) identifies ownership arrangements of 36 instances in 34 DMAs® (DMA® is a registered service mark of The Nielsen Company. Used under License)

of common ownership of multiple Big 4 affiliates in the same market. Further, ACA identifies 57 instances of common control of stations in 53 DMA® (DMAs® is a registered service mark of The Nielsen Company. Used under License) (American Cable Association, 2010). The Georgetown University Law Center identified 55 markets in which SSAs were operative by collecting data from various sources, including press releases, Wikipedia, individual stations' websites, EEO filings, and job listings (personal communication, April 2011). In addition, FreePress has conducted extensive research to identify the stations that have entered into these agreements (personal communication, June 2011). By examining these data sources, in addition to our own investigation, we have determined that there are 83 television markets in which one or another of these types of agreements (JSA, SSA, LMA or LNS) is operative. These markets account for over 64 million television households in the U.S., out of a total of just under 116 million such households in 2011, representing 55 percent of the television households in the country.[1] Given the increasing presence of these arrangements, it is remarkable that neither the FCC, nor any commercial media data company, has an accurate picture of the phenomenon.

Although the earliest of these agreements date as far back as 2000, in the midst of national and global economic instability, increasing numbers of local television news stations have signed these agreements. Purportedly, these agreements are expected to help relieve some of the economic burdens that are shouldered by local stations in gathering news content or other activities. It is uncertain what impact these agreements will have on the overall content of local news in markets with stations that have adopted this practice.

The Honolulu television market is a prime example of the purposes of the SSAs. As of the 2009-2010 television season, the Honolulu television market consisted of 433,240 television households and it was ranked number 71 (it was #72 in 2009) out of the 210 television markets (DMAs® (DMA® is a registered service mark of The Nielsen Company. Used under License) in the United States as determined by Nielsen.[2] There are five stations in the market that deliver daily locally-produced news broadcasts: KFVE (MyNetworkTV), KHNL (NBC), KGMB (CBS), KHON (Fox) and KITV (ABC). On August 18, 2009, Raycom Media, the owner of KHNL and KFVE and MCG Capital Corporation, the owner of KGMB announced

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[1] Source: Nielsen, Nielsen Station Index, estimates used for 2010-2011 television season. In 2011 there were 115,905,450 television households in the U.S.

[2] Source: Nielsen, Nielsen Station Index, estimates used for 2009-2010 television season. In 2010 there were 114,900,00 television households in the U.S.

the establishment of a Shared Service Agreement (SSA) under which the two companies would combine the three stations (KFVE, KHNL & KGMB) to "creatively and successfully address the impact of the negative economy and to secure the future of all three television stations in Hawai'i" (tvnewscheck.com, 2009). Paul McTear, president-CEO of Raycom Media further articulated the economic reasons for the action:

> The purpose of the shared services agreement is to not only secure the future of KHNL, KFIVE and KGMB, but to operate them more efficiently and effectively without diminishing the quality of news and other programming provided to our customers in Hawai'i. We realize there may be other financial and business options available, and while we are certainly open to discussing these with any interested party, the economic reality is that this market cannot support five traditionally separated television stations, all with duplicated costs. Rather than experiencing the loss of one, or possibly two stations in Hawai'i, we intend to preserve three stations that provide important and valuable local, national and international programming in Hawai'i (tvnewscheck.com, 2009).

Under the agreement, non-news programming remained in place, but the news operations of two (KGMB & KHNL) of the three SSA stations were combined under one banner, ***Hawai'i News Now***. The news operation began broadcasting on October 26, 2009. KHNL and KGMB jointly produce a simulcast of their newscasts on weekday mornings between 5 AM and 7 AM , and weeknights from 5 to 5:30 PM and 10 to 10:30 PM. Therefore, three hours of the exact same daily news appears on the stations each weekday. KFVE produces a 6:30 PM and 9 PM newscast. The news operations of all three stations are housed in the same building.

The Shared Services Agreement announced by Raycom and MCG Capital has been officially challenged by a local non-profit organization, Media Council Hawai'i (MCH). Founded in 1970, it was formerly known as the Honolulu Community Media Council. MCH, represented by the Institute for Public Representation at the Georgetown University Law Center, filed a complaint and request for relief with the Federal Communications Commission on October 7, 2009. MCH's filing is the only formal challenge that the FCC has received from a community group in any of the television markets in which Shared Service Agreements are in effect. As of September 2011, the FCC has not acted on the filing.

My analysis of the Honolulu television market in which I examined the effect of the SSA on the local news content was completed in early 2011 and filed

as a comment with the Federal Communications Commission on February 11, 2011 (Yanich, 2011).

In its filing, Media Council Hawai'i contended that the Shared Services Agreement between Raycom and MCG Capital would result in "an unauthorized transfer of control in contravention of the Communications Act and FCC rules" (Campbell, 2009, p. 1). Further, MCH stated that these actions "would harm the members of Media Council Hawai'i and the general public by reducing the number of independent voices providing local news from four to three, and by substantially reducing competition in the provision of local news and the sale of advertising time" (Campbell, 2009, p. 2).

The FCC regulates the broadcast industry based on three principles---diversity, competition and localism. The implementation of the shared service agreements, whether they involve simply sharing video to sharing news-gathering resources to overall management of the station, has implications for each of the fundamental principles. How will these agreements affect, if at all, the construction of the newscasts? What effect, if any, will such constructions have on diversity, competition and localism in local television markets? What effect, if any, do these agreements have on the nature of news?

By any measure, the shared services agreements that have been concluded among the owners of television stations in the same market change the operation of the stations that are part of the agreement. That is their intended goal. Aspects of the stations--news, marketing, advertising, etc.—are shared among the parties to achieve some economies of scale in the operation of the stations. This research is an empirical examination of the news programming outcomes of such arrangements in eight television markets and it speaks directly to the issues raised in the Notice of Inquiry regarding quadrennial review of media ownership rules published by the FCC on May 25, 2010 (FCC 10-92).

Methodology & Research Questions

The methodology for this research was content analysis (Riffe, Lacey & Fico, 2005). It is a method that produces a systematic and objective description of information content. The analytical method used in this research was the Chi-square measure of association. The research questions for the study were as follows:

Research Question 1: What was the distribution of stories across the newscasts of the stations? How were anchors, reporters, story scripts and video/graphics used across the SSA/LMA stations? To what extent, if at all, were those dimensions similar across the stories? How did the SSA/LMA stations and the non-SSA/LMA stations compare along the dimensions of
story type and local content?

Research Question 2: How do SSA/LMA and non-SSA/LMA stations compare along the production factors of the stories. Television news is "consumed" in series. That is, the viewer must see the first story before seeing the second story and so on. Therefore, one of the purposes of the first story is to attract and to hold the viewer for the rest of the broadcast. As a result, the production mode, duration and placement of the story convey to the public crucial attributes of the saliency and importance of the issues it addresses. What differences, if any, were there in the production factors of SSA/LMA and non-SSA/LMA stations?

The tests for statistical significance used in the analysis was chi-square for nominal variables and analysis of variance for ratio variables, specifically, the duration of the stories.

The Television Markets

For this research, we focused on Shared Services Agreements (SSAs) and/or Local Management Agreements in which the stations shared the news function because, by definition, they affected the production of the local television newscasts of the stations. Further, the content of the broadcasts that formed the data for this research was provided through a cooperative agreement with DirecTV. Therefore, the sample of markets in the study had to meet two conditions; first, the market had to have a Shared Services Agreement among, at least, two stations, and, second, the broadcasts of the entire market had to be available on DirecTV in order to capture the content. At the time that the sample of DMAs® (DMA® is a registered service mark of The Nielsen Company. Used under License) for this study was drawn, the universe of television markets in which SSAs were operative was 55. Therefore, we used that list of DMAs® (DMA® is a registered service mark of The Nielsen Company. Used under License) from which to draw the sample. The first randomly drawn list of the eight markets for the sample contained two markets in which DirecTV could not capture the broadcasts of all of the stations. As result, another random selection process was conducted to replace the two markets. That process produced a sample of eight television markets in which 37 stations regularly produced local news broadcasts. The markets ranged in size (as measured by the number of television households in the DMA® (DMA® is a registered service mark of

The Nielsen Company. Used under License) from number 17, Denver, CO to number 146, Wichita Falls, TX and collectively comprised 4,170,110 television households[3] (Table 1).

The television markets represented a variety of ownership and management structures. For example, Denver, CO, Des Moines, IA, Burlington, VT and Columbus, GA each had only one consolidated management structure in the market. However, each of the other four markets had some combination of two SSAs or LMAs or duopoly. That phenomenon was most pronounced in Peoria, IL and Wichita Falls, TX where there was no station in either market that was independent of an SSA or LMA arrangement.

Table 1: Markets*, Television Stations in the Sample

DMA®	Station	Owner	Management Status
Denver, CO **DMA®# 17** **1,572,740 TvHH**	KDVR	Local TV LLC	LMA
	KWGN	Tribune	LMA
	KCNC	CBS	Independent
	KMGH	McGraw-Hill	Independent
	KUSA	Gannett	Independent
Jacksonville, FL **DMA®#49** **678,430 TvHH**	WAWS	Newport Television	SSA
	WTEV	High Plains	SSA
	WLTV	Gannett	Duopoly
	WJXX	Gannett	Duopoly
	WJXT	Post-Newsweek	Independent
Dayton, OH **DMA®# 62** **527,030 TvHH**	WRGT	Cunningham	LMA1
	WKEF	Sinclair	LMA1
	WDTN	LIN	LMA2
	WBDT	ACME	LMA2
	WHIO	Cox Broadcasting	Independent

[3] Source: Nielsen.

Table 1: Markets*, Television Stations in the Sample			
DMA®	Station	Owner	Management Status
Des Moines, IA DMA®# 73 432,820 TvHH	KDSM	Sinclair	SSA
	WHO	Local TV LLC	SSA
	WOI	Citadel Communications	Independent
	KCCI	Hearst	Independent
Burlington, VT DMA®# 95 330,730 TvHH	WFFF	Smith Media	SSA
	WVNY	Lambert	SSA
	WCAX	Mt. Mansfield	Independent
	WPTZ	Hearst	Independent
Peoria, IL DMA®# 116 251,880 TvHH	WEEK	Granite	SSA
	WHOI	Barrington	SSA
	WAOE	Four Seasons	SSA
	WYZZ	Sinclair	LMA
	WMBD	Nextar	LMA
Columbus, GA DMA®# 127 219,450 TvHH	WTVM	Raycom	SSA
	WXTX	Southeastern Media	SSA
	WRBL	Media General	Independent
	WLTZ	Sagamore Hill	Independent
Wichita Falls, TX DMA®# 146 157,030 TvHH	KFDX	Nextar	SSA1
	KJTL	Mission	SSA1
	KSWO	Drewry Broadcasting	SSA2
	KAUZ	Hoak Media	SSA2

*Source=Nielsen, 2011
DMA® (DMA® is a registered service mark of The Nielsen Company. Used Under License)

The stations in the sample: The stations in the sample consisted of every station in the television market that regularly delivered a daily local news

broadcast. There were other stations in some markets that presented programming. However, none of those stations produced a daily news broadcast. Therefore, they were not included in the sample of stations for the research. They produced no content that was appropriate to the research questions that we stated.

The sample of broadcasts: The sample of broadcasts for this research consisted of a constructed week of broadcasts during which the SSAs were operative in the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License). A constructed week consisted of the newscasts of a particular day gathered over an extended period of time. For example, the Monday of the first week was included in the sample. The Tuesday broadcast of the second week was part of the data, and so on until the broadcast week was constructed. We limited the broadcast week to Monday through Friday to eliminate the possibility of week-end sporting events that might have pre-empted newscasts.

Due to the technical nature of the capture and archival process that DirecTV used, the exact same constructed week could not be used for all eight markets. The capture of broadcasts had to occur in a sequence to accommodate that technical process. However, the date to begin capture was randomly determined. That day was Wednesday, May 4, 2011. The first DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License) in which broadcasts were captured was Dayton, Ohio. Therefore, the broadcasts that were included for that market were those on Wednesday, May 4, Thursday, May 12, Friday, May 20, Monday, May 30 and Tuesday, June 7. That same approach was applied to the other markets. The constructed week for Des Moines, Iowa began on May 5 and ended on June 8; Burlington, Vermont, May 6 to June 9; Columbus, Georgia, May 9 to June 10; Peoria, Illinois, May 10 to June 13 and Denver, Colorado, May 11 to June 14. Because DirecTV could only capture the broadcasts of six markets at one time, the constructed weeks for the two remaining markets began immediately after the first six were completed. Therefore, the broadcasts of Wichita Falls, Texas were captured for a constructed week that began on June 15 and ended on July 11. That period for Jacksonville, Florida was June 16 to July 20. The fact that different constructed weeks were used in the analysis was consistent with the research questions because the comparisons across stations only occurred ***within*** the television markets.

Unit of observation: The unit of observation for this research was the individual stories that appeared on the broadcasts. Initially, the stories were distilled from the 25 types of broadcast units that were coded. These broadcast units included twenty-one story types and four broadcast units that were not part of

the analysis. Those units not included for analysis were: promos for the station/ network; the weather segment; the sports segment and commercials. The professional literature regarding the construction of a newscast recognizes that the sports and weather segments are structural features of the broadcast (Donald & Spann, 2000; Jones, 2004). They are always included in the newscast and, as a result, they are not subject to the news selection calculus that is applied to all other stories. They are always "in" the broadcast. And, even within the segments, the "in-or-out" decision model is less stark than that used for the general news outside of the segments. In general, the sports segments on local television news deal with the day's scores or activities of whatever sport is in season and not with in-depth sports reporting. The coding revealed a total of 2,555 separate stories[4] that were broadcast across the stations, excluding promos, commercials and sports and weather segments. The stories were distilled from the 4,725 broadcast units that were presented. In addition to the stories (n=2,555), the distribution across the other broadcast units was: station promotions (n=895), commercials (n=746), weather segments (n=338) and sports segments (n=191).

The content of the broadcasts in the sample was coded by five students majoring in communication. The students were trained to use the coding protocol over the course of two weeks. At the end of that time a test for inter-coder reliability was applied. All of the broadcasts on one randomly chosen day from one randomly chosen market (Peoria) provided the data for the test for inter-coder reliability. Each story in ***all*** of the broadcasts was coded by ***all*** of the coders. I assessed the agreement among the coders across the variables that were essential to the research question--- type of story, presentation mode, whether it was a local story and the number of stations on which the story appeared in the market. I did not assess agreement on simple identification variables such as the name of the market, the date of the broadcast, the station's network affiliation, etc. The results of the tests for inter-coder reliability revealed that agreement among the major content variables had a range from 69 percent (type of story) to 98 percent for the appearance variable with an average of 84 percent. As expected, given the assumptions inherent in these indices, the Cohen's kappa scores for the same variables were generally lower than the agreement scores, ranging between .65 and .96, averaging .77 (Table 2). As seen in the table below, kappa scores for each of the variables met the generally accepted criteria of, at least, "fair to good agreement beyond chance" (.40-.75) and several of the kappa statistics above .75

[4] The distribution of the stories across the eight television markets was: Denver=412; Dayton=366; Jacksonville=336; Des Moines=329; Peoria=272; Wichita Falls=243; Burlington=374 and Columbus=223.

reveal "excellent agreement" (Banerjee, 1999, p. 6). Importantly, the very high kappa scores were achieved for the most crucial variables regarding whether or not the same story appeared across the stations.

Table 2: Reliability Results for Key Variables

	Type	In/Out DMA®	Mode	Appr Stn 1	Appr Stn 2	Appr Stn 3	Appr Stn 4	Appr Stn 5	Avg
Kappa for multiple coders	0.647	0.733	0.722	0.939	0.938	0.958	0.823	0.96	0.777
% agree	0.69	0.898	0.873	0.971	0.971	0.98	0.912	0.98	0.841

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The initial coding scheme developed twenty-one separate categories for topic in order to capture the differences among the stories. After coding and a preliminary analysis, those twenty-one categories were aggregated into five categories based on a logical assessment of the aspects of each. They were: (1) crime; (2) public issues (containing all public issues such as housing, education, health, environment, etc., except crime); (3) government/politics; (4) human interest; (5) other (fires, accidents, etc.). Obviously, another test of inter-coder reliability for the aggregated variable was not conducted. However, because the ***type*** variable was collapsed from twenty-one possible values to five values (*crime, public issues, government/politics, human interest, other*), logically, the inter-coder reliability was increased.

Even though the sports and weather segments were not included in the sample of stories, sports and weather stories that were presented outside of those segments were coded as news. For example, a story regarding the effects of flooding that was broadcast outside of the weather segment would be coded as a news story. Likewise, a sports story concerning the level of steroid use in professional baseball that was presented outside of the sports segment would also be coded as a news story. The comparison of the distribution of the stories across the stations within a DMA® (DMA® is a registered service mark of The Nielsen

Company. Used under License) was calculated as the percentage of stories that appeared on the stations.[5]

Local vs non-local stories

One of the fundamental principles on which the Federal Communications Commission bases media ownership policy is localism. In previous analyses, researchers for the FCC determined the definition of localism, in part, by the delineation of Designated Market Areas by Nielsen. In a letter dated April 3, 2003 to the Federal Communications Commission quoted in the FCC researchers' paper, Nielsen offered the following explanation for the construction of DMAs® (DMA® is a registered service mark of The Nielsen Company. Used under License): "In designing the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License), regions, Nielsen uses proprietary criteria, testing methodologies and data to partition regions of the United States into geographically distinct television viewing areas, and then expresses them in unique, carefully defined regions that are meaningful to the specific business we conduct" (as cited in Alexander and Brown, p. 4).

The FCC researchers established necessary and sufficient conditions for localism. The "necessary" condition for localism was that the story had to take place within the the physical boundaries of the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License). The "sufficient" condition concerned the news stories themselves. When was a story broadcast by a station in the market a "local" story? The decision rule for sufficiency used by the FCC researchers and adopted in this analysis stipulated that the story was "local" if the story was of at least marginally greater importance to the average individual residing within the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License) and that the individual would identify the story as local. "Thus, it is the value of the story to the individual within the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License), and that individual's perception of the story as local relative to individuals in other DMAs® (DMA® is a registered service mark of The Nielsen Company. Used under License), that gives the story its sufficient local context" (Alexander and Brown, p. 5).

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[5] In previous research, I have used the proportion of ***time*** that was devoted to story topics rather than proportion of ***stories*** devoted to the topic because time is the most scarce element of a newscast. However, the questions for this research focused on individual stories and how they were broadcast across the various stations. Therefore, the proportion of ***stories*** devoted to a particular topic was utilized as the variable that indicated the performance of the stations.

For example, a story about the New York Stock Exchange and its effect on the economy that was broadcast in the New York television market would necessarily interest persons in that television market whose professional activity was tied to the stock market. However, the average individual in that market would likely view the story as a national issue. Based on my previous research, the local versus non-local nature of the story was relatively straightforward. That is especially so given that the first criterion for the designation as a local story is the requirement that the action of the story has to occur within the television market.

Production Factors: Duration, Placement, Presentation Mode

The managers of the Shared Services Agreements stated specifically that the reason for the arrangement was to secure the long-term economic health of the stations involved in the SSA. It was a move that was dictated by economic concerns. Fundamentally, they wanted to reduce the costs of production of the newscasts. There are two production aspects of the stories that speak directly to that economic calculus---the duration of the story and the presentation mode that is used to convey its substance. We looked at the each of those factors for the SSA and non-SSA stations in the market.

Duration: The most scarce resource in broadcast news is time. It is finite. As a result, the news selection calculus is a zero-sum game. If some stories are in, then others are out. But, once the in/out decision is made for a particular story, other crucial decisions are taken. The first is how much time will be devoted to the story. The adage that time is money is literally true in the case of television news. Therefore, the duration of stories represents a cost decision on the part of the news director. What were the results of those decisions for the story types across the station groups in the market?

Story Placement: A complimentary characteristic of time in a broadcast is story placement. Just like the judgment regarding how much time will be devoted to a story, the decision about where to place it in the newscast is critical because the stories of a newscast are viewed by the audience in a series. Unlike print media, the audience cannot skip over the first story to get to the second or third or others. Therefore, each story in the broadcast has two purposes: to inform the audience and to hold that audience for the next story. Indeed, there is some research that suggests that the need to hold an audience has made the news "infotainment" (McManus, 1994) and that is constructed only to sell the audience to advertisers (Hamilton, 2004). Consequently, the placement of a story is a crucial factor in the cost calculus of a newscast. In the placement decision, the station explicitly indicates what information it thinks will achieve and hold an audience.

Coupled with duration, the placement of a story sets what news directors call the "pace" of the newscasts.

The variable I constructed for story placement was ***block***, defined as the time between the commercial breaks. The first block is the period from the opening of the newscast to the first commercial break. It typically lasts between nine and eleven minutes and it is, by far, the longest period of uninterrupted news in the program. It is the opportunity for the broadcast to capture and hold an audience. In the analysis, the content of Blocks 1 & 2 was maintained, but the findings for Blocks 3 to 6 were collapsed because they represented a relatively small proportion of content.

Presentation Mode: Selection, duration and placement are all important production aspects of news stories. However, the most cost sensitive factor in the production of a newscast is the ***presentation mode*** of the story. It involves decisions regarding the deployment of the station's most costly resources—personnel. Between 2008 and 2009, local television news lost over 1600 jobs. But, despite staff reductions during that time period, the average amount of news increased from 4.1 hours per day to 4.6 hours per day (Pew, 2010). As a result, new directors have been asked to produce more stories with fewer staff. And, news production is an extremely labor intensive activity. Therefore, the decisions regarding how a news story is presented represents a major economic decision. By definition, different presentation modes require different expenditures of resources and the choice of presentation mode for story types reflects the station's judgment regarding which stories can capture and deliver an audience to advertisers. Consequently, the choice of presentation mode in a newscast has major economic implications. I defined presentation mode as the system of professional broadcast techniques used to communicate the narrative and/or the pictures of the stories to an audience. I identified five types of presentation mode: voice-over by anchor; anchor-read without video; package; live location report; and reporter live in the newsroom.

In the voice-over by anchor mode (VO/anchor), the story was delivered by the news anchor who provided narrative as the videotape that was shot for the story was shown on the screen. In my previous research, this presentation mode was the most often used by the stations. The frequency of the use of this mode makes economic sense. The anchor represents the "brand" of the station to the community and, typically, the anchor is the highest paid member of the news staff. Using the anchor in the presentation of as many stories as possible increases the return on that investment.

A second approach to presenting stories was the reading of the narrative by the anchor without any video being shown on the screen (anchor read w/o video)---the proverbial talking head.

In the package presentation mode, a news crew (reporter and camera operator) went to the scene of the story, shot video, produced the video for broadcast and the reporter wrote the narrative for the voice-over. The package mode required more time and resources and it was the most expensive method for presenting a story.

Live location reports involved the reporter going to the location of the story and broadcasting from there during the newscast. This is the time-honored "stand-up" approach.

The presentation mode of live reporter in the newsroom is a variation on the theme of the VO by anchor. In this approach, the anchor introduces the story and then "tosses" the remainder of the presentation to a reporter who is somewhere else in the newsroom who completes the narrative.

For the purposes of this analysis, I collapsed the types of presentation modes from five to three categories, given the use of the modes across the newscasts. The VO by anchor and package modes were considered separately because they accounted for the overwhelming majority of the modes for the stories. The anchor read, live reporter in newsroom and the live location modes were combined into the ***Other*** presentation mode category.

Presentation of Findings

The findings for each of the markets are presented here separately because the research questions for this analysis focused on the activities of stations ***within*** the markets. The order of the findings follows the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License) rank of the markets: Denver, CO: Jacksonville, FL; Dayton, OH; Des Moines, IA; Burlington, VT; Peoria, IL; Columbus, GA and Wichita Falls, TX. In this research, the analysis was organized around a comparison of the performance of the stations by management/owner status within the television market. The following findings reflect that comparison along the dimensions of content (story topic and local vs. non-local stories) and production factors (duration and story placement) and distribution across the newscasts. Further, in order to examine the possible effect of the implementation of the SSAs (or LMAs or duopolies), I analyzed the distribution of each specific story across the stations. That is, on how many stations did a story appear on the same day? There were many possibilities, from only one station to all stations in the market, with a myriad of combinations in between. I looked at every combination that appeared in the data.

Denver

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D. Yanich, University of Delaware

The Denver Television Market

Denver, Colorado is the 17th largest television market in the U.S. with 1,548,570 television households.[6] There are five television stations that deliver a regularly scheduled daily newscast to the market. They are: KDVR, KWGN, KCNC, KMGH and KUSA. Two of the stations, KDVR and KWGN, are part of a Licensed Management Agreement (LMA). The remaining three are independent stations.

KDVR is the Fox network affiliated in Denver, owned by Local TV LLC. KDVR started as a locally owned station in August 1983. By the end of the decade, the station became affiliated with the Fox network, and adopted its Fox 31 name. In 1995, through ownership changes, KDVR became a Fox owned-and operated (O&O) station, which allowed it to air first-run talk and reality shows, but it did not broadcast news programming. As of September 2011, KDVR produced a total of 13.15 hours of local news weekly; ten hours Monday through Friday and 3.15 hours of local news on weekends (Titantvlistings, 2011). According to KDVR's web site, the news team is made up of 30 "personalities" including anchors, reporters, weather and sports (Fox31 news team, 2011)

KWGN, a CW affiliated station, started operations in July 1952 as KFEL-TV, and it was the first television station in Colorado to go on the air after the FCC licenses freeze was lifted in 1952. In 1966 the station was bought by WGN, known today as Tribune Broadcasting, the new owner changed the letters to KWGN. Since then, the station has gone through management changes, affiliations and merges. Currently, KWGN broadcasts an-hour newscast at 7:00pm Monday through Friday for a total of 5 hours of local news a week (Titantvlistings, 2011). The station does not air news on weekends. There are a total of 24 employees in KWGN's news staff according to the station's web site (kwgn.com, 2011).

In September 2008, KDVR and KWGN entered into a Local Management Agreement (LMA) that went into effect on October 1st, 2008. In almost all of its aspects, this LMA has the attributes of a Shared Services Agreement in that it combined news operations and programming (Jessell, 2008). Both stations continuously share resources, reporters, photographers, and editors. In addition, they operate in the same facility, which is KDVR studio, and KDVR general

[6] Source: Nielsen

manager administers them. It is relevant to note that by only looking at the stations' web sites; www.kdvr.com and www.kwgn.com and comparing the contact information, KDVR and KWGN share same address, phone number and same contact email address. In addition, if the public desires to advertise on any of the stations web page, it is the same contact person.

KCNC first went on air on December 24, 1953, as KOA-TV and under the NBC affiliation. By 1990, KCNC was broadcasting almost 40 hours of news per week. In 1995, KCNC switched networks affiliations, from NBC to CBS. Later in the same year, CBS and Westinghouse became allies, and for the second time, KCNC became an owned-and-operated station, but this time by CBS. Today, KCNC airs 27½ hours of local news weekly; 4½ hours on weekdays, two hours on Saturdays, 3½ hours on Sundays) (Titantvlistings, 2011). Forty-four employees are part of KCNC staff combining anchors, reporters, producers, and technicians (Cbs4 news, 2011).

KMGH, the ABC affiliate in Denver, began broadcasting as KLZ-TV in November 1, 1953 and it is owned by McGraw-Hill. Over the course of its history the station has been awarded three Peabody Awards and two Alfred I duPont awards for investigative reporting and documentaries. Additionally, in July 2011 the station was named station of the year by the Associated Press Television-Radio Association (Denverpost.com, 2011). Currently, 7News airs 30 hours of local news each week (with 4.5 hours on weekdays, 3.5 hours on Saturdays and four hours on Sundays) (Titantvlistings, 2011). According to the stations' website, the staff of KMGH consists of 31 employees in the areas of news, weather and sports. (7news team, 2011).

KUSA, the NBC affiliate in the market, started operations on October 12, 1953, under the KBTV call letters. It was the second station in Denver after KWGN. Initially, Mullins Broadcasting owned the station, and it was a primary CBS, but it carried content from ABC and NBC as well. In 1972 the station was sold to what it is today Gannett Company, and on March 1984 its call letters changed to KUSA-TV. The station airs 18 hours of local news per week; 15 hours during the week and 3 hours on weekends (Titantvlistings, 2011). In addition, its news team has a total of 73 members combining anchors, reporters, news manager, sports, weather, photojournalists, and web designers (9news team, 2011).

The constructed week for the Denver market that comprised the sample of broadcasts began on Wednesday, May 11 and ended on Tuesday, June 14, 2011. The newscasts that were captured represented the most appropriate combination of broadcasts to make comparison possible. That meant that the 5pm newscasts of four of the stations and the 7pm newscast of one station composed the sample. The LMA stations, KDVR and KWGN, each had newscasts that were 60 minutes in duration. The KDVR newscast occurred at 5pm; KWGN broadcast its news at 7pm. The independent stations each had 30-minute broadcasts at 5pm. During the constructed week, 412 stories were presented across the newscasts with the following distribution: KWGN=120; KDVR=106; KMGH=91; KCNC=49; KUSA=46.

Ratings: According to Nielsen, the newscasts experienced a wide range of ratings in May 2011.[7] It is notable that all of the independent stations registered ratings substantially above those of both of the LMA stations. KUSA was, by far, the ratings leader with a 4.9 rating and a 12 share. That was followed by KCNC (3.3 rating, 8 share); then KMGH (3.1 rating, 7 share). At 5pm, KDVR achieved a 1.3 rating and a 3 share, while at 7pm its LMA partner (KWGN) registered a 1.4 rating and a 2 share (Nielsen, Licensed Data, 2011).

Distribution of Individual Stories

The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=412) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast **only** on the LMA stations **individually** appeared either on only KDVR or KWGN and nowhere else. Likewise, the stories that were reported **only** on a **combination** of the LMA stations were broadcast on the two LMA stations, and nowhere else. Further, the stories that were reported on an individual independent station appeared on one such station, and nowhere else. Each of the appearance categories was mutually exclusive. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations within the station groups as defined by the LMA and independent stations. The graphs that follow indicate the findings for each of the specific distributions across the stations.

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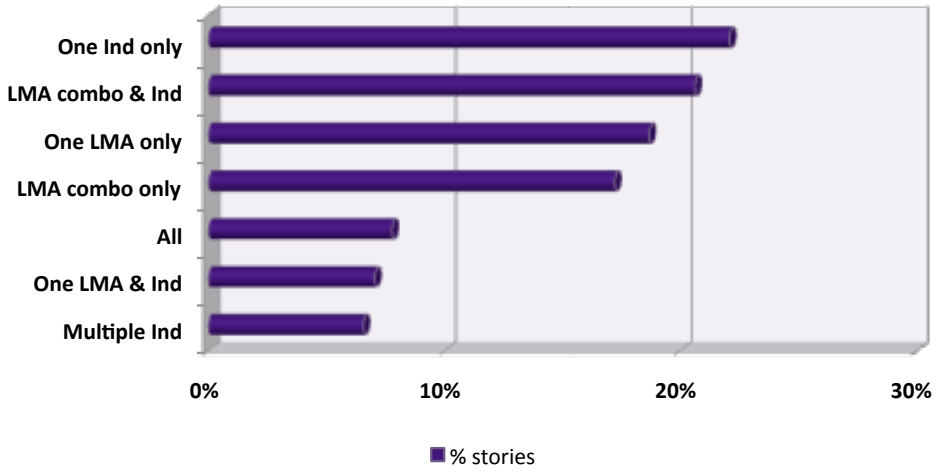
[7] Rating is the percentage of all television households tuned to a specific station. Share is the percentage of households tuned to a specific station at a specific time.

Distribution of all stories

It is important to note that the durations of the broadcasts of the stations were not equal and that was reflected, as we would expect, in the how the stories were distributed across the stations. Both of the LMA stations, KDVR and KWGN, broadcast hour-long newscasts that were separated by one hour (the KDVR broadcast ended at 6pm and the KWGN broadcast began at 7pm). On the other hand, each of the independent stations broadcast a 30-minute newscast. Consequently, the proportion of stories that appeared on the LMA stations reflected their longer newscasts.

The "appearance" pattern that was most prominent in Denver (Fig. 1) was stories that were broadcast ***only*** on ***one*** independent station, either KCNC, KMGH or KUSA (22%). The next most prominent pattern was stories that appeared the LMA combination and, at least, one independent station (20%). Individual stories that appeared ***only*** on ***one*** of the LMA stations comprised nineteen percent of stories. Stories that appeared ***only*** on the LMA combination were seventeen percent of the total. Less than one out of ten stories (8%) appeared on ***all*** of the stations. The pattern of one-LMA and one independent station accounted for seven percent and stories that were broadcast on two or more independent stations accounted for the smallest proportion of stories (just under 7 percent).

Fig. 1: Distribution of all stories across all stations (N=412)

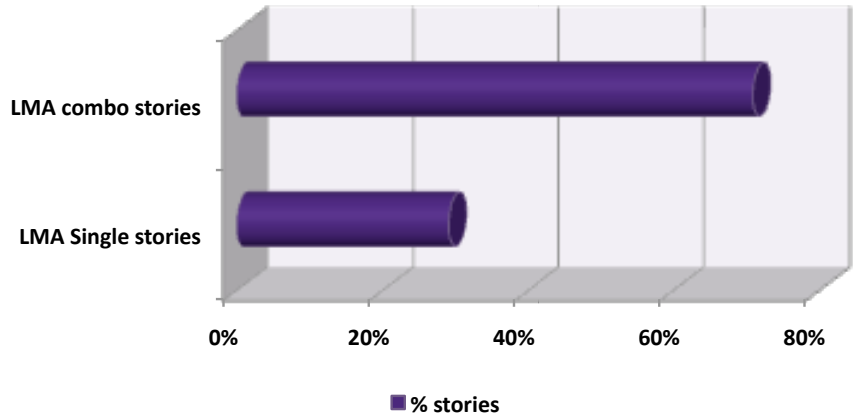


An important finding in the distribution of the stories showed that independent stations had the lowest proportion of overlapping stories and the

highest proportion of stories that were broadcast on only one of the stations. Another important finding in the distribution of the stories revealed that almost half of the stories (46%) appeared on the LMA combination, either ***only*** on the two stations (KDVR & KWGN), or on ***both*** LMA stations in addition to, at least, one independent station. Therefore, the LMA combination was very prominent in the presentation of stories. We must keep in mind the caveat that the LMA stations newscasts were one hour and the independent stations' newscasts were thirty minutes and that would affect the distribution, but the pattern of shared stories on the LMA stations was consistent.

In order to tease out the character of the stories that appeared on the LMA stations, I looked more closely at the 265 (out of 412) stories that they broadcast (Fig. 2). The effect of the LMA was revealed in the finding that the overwhelming majority (71%) of the stories that were broadcast by the LMA group were presented on ***both*** of the stations. The remaining twenty-nine percent of stories were broadcast only one LMA station.

Fig: 2: Distribution of stories on LMA stations (n=265)



Sharing Resources: Given that the purpose of the LMA was to reduce the cost of news production, I examined how some crucial resources were used among the stations. Specifically, I examined the stories along four dimensions: use of anchors; use of reporters; use of scripts; and the use video/graphics.

Table 3: Distribution of Anchor, Reporter, Script, Video on LMA stations				
	Same Anchor %	Same Reporter %	Same Script %	Same Video/ Graphic %
LMA combination stories	**11**	**39**	**62**	**67**

The stories that appeared on the LMA combination did share critical resources. Specifically, the same script was used for over sixty percent of the stories across both stations (Table 3). Further, the same video or graphics were also used for two-thirds of the time across the same story on both stations. By these measures, the audience saw the same story with the same frame/narrative about two-thirds of the time across the LMA stations. Further, almost four out of ten stories were presented on both stations using the same reporter.

Story Type & Local vs. non-Local stories

The distribution of the types of stories that were covered by both the LMA and independent stations was relatively similar (Table 4). There was no statistical difference between them. For each, the coverage of public issues (all public issues other than crime) occupied about one-third of the newscasts (35 and 33 percent for LMA and independent stations, respectively. Government and politics accounted for the smallest proportion of stories on both types of stations, however, it was in

Table 4: Story Type* across LMA & independent stations		
Story type	LMA stations	Independent stations
Public Issues	**35**	**33**
Human Interest	**22**	**19**
Other**	**19**	**18**
Crime	**15**	**17**
Govt/Politics	**9**	**13**
Total	***100***	***100***

***=percentage of stories; **=fires, accidents, etc.**

that story type that the largest difference between the LMA and independent stations was visible (9 and 13 percent, respectively).

As with story type, there was no statistically significant difference in the coverage of local vs non-local stories across the LMA and independent stations. Local stories comprised about two-thirds of stories for both types (Table 5).

Table 5: Local stories* across LMA & independent stations

	LMA stations	Independent stations
Local stories	**66**	**68**

***=percentage of local stories**

Production Factors: Presentation Mode, Block, Duration

In addition to content, ***how*** stories were presented on the newscasts was an important factor to consider. That overall consideration was manifest in the production factors of presentation mode, placement of the story within the newscast (as defined by block) and duration of the story. In the Denver market the differences in the length of the newscasts had a significant effect on the production factors used in the newscasts. The LMA stations each delivered a 60-minute newscast while the independent stations' newscasts were 30 minutes. And, time is the most scarce commodity on broadcast news. Having more or less of it affects how the newscast is constructed. As a result, there were statistically significant differences between the LMA and independent stations on each of these factors.

Presentation Mode: The differences in the use of presentation modes between the station types was statistically significantly different (Table 6). For each of the station types, voice-over by anchor was the most prominent presentation mode that was used to convey the stories (49% and 55% for the LMA and independent stations, respectively). Further, the LMA stations relied more heavily on the package mode (39%) than the independent stations (25%). The package mode, by definition, requires more resources and the stations need time to broadcast those stories. The 60-minute broadcasts of the LMA stations offered that opportunity.

Table 6: Presentation mode across LMA & Independent stations*		
	LMA stations	independent stations
Voice-over by anchor	**49**	**55**
Package	**39**	**25**
Other**	**12**	**20**
Total	***100***	***100***
p=<.05. *=percentage of stories; **=anchor-read, live location, reporter in newsroom.		

Placement: The differences in the length of the broadcasts between the station types was also evident in the placement of the stories within the broadcasts. I defined placement as block, the periods of the newscast separated by commercial breaks. Therefore, block 1 represents the period from the opening of the show to the first commercial break. It is typically the longest block in which the most important stories of the day (as defined by placement) are presented. Block 2 represents the second such period (between the first and second commercial breaks). The blocks after the third commercial break were collapsed in order to aid the analysis.

There were significant differences between the station groups regarding story placement. Almost two-thirds (62%) of the stories on the independent stations appeared in the first block as compared to only about one-third (32%) of stories for the LMA stations (Table 7). Most prominently, however, was the difference for the period after the second block. Over half (53%) of the stories on the LMA stations appeared in those portions of the newscast while a very small proportion of the independent stories appeared there (3%). Logically, that was due to the differences in the length of the broadcasts. There were simply more blocks of time after the second block for the LMA stations. Further, the independent stations used the later blocks to present the sports and weather ***segments*** of their newscasts and they were not part of the stories of the sample.

Table 7: Placement of stories across LMA & Independent stations*		
	LMA stations	independent stations
Block 1	**32**	**62**
Block 2	**15**	**35**
Block 3+	**53**	**3**
Total	***100***	***100***
p=<.05. *=percentage of stories		

Duration: The differences in the percentage of stories that were presented using the various modes were put into perspective when I considered the duration of the stories (Table 8). To wit: even though the LMA stations had a higher percentage of package stories than the independent stations (39% vs 25%, see Table 6), the duration of those stories across the station types revealed that the independent stations, on average, spent slightly more time on the package stories (131 seconds vs 126 seconds). That was accomplished even though the independent stations had half of the time (as measured by length of broadcast) in which to present the stories. The largest difference in the average length of stories for the station types occurred for the ***other*** presentation mode (59 vs 27 seconds). For all stories, the LMA stations spent an average of 73 seconds vs the independent stations at 57 seconds.

Table 8: Presentation mode & Duration* across LMA & Independent stations		
	LMA stations	independent stations
Voice-over by anchor	**34**	**33**
Package	**126**	**131**
Other**	**59**	**27**
All modes	*73*	*57*
p=<.05. *=mean number of seconds **=anchor-read, live location, reporter in newsroom.		

Summary

There are several ways to view the effects on news content of the Local Management Agreement between KDVR and KWGN in the Denver market. On one hand, there were similarities of content between the LMA and independent station types, particularly as measured by the types of stories and the proportion of local stories that each broadcast. The differences between the stations were revealed more prominently among the production factors that were used for the stories and those differences, I suggest, were driven by the different lengths of the broadcasts. However, given the fundamental concerns of this research regarding the principles of competition and diversity, there are two findings that stand out. The stories that were broadcast on both of the LMA stations were essentially the same almost two-thirds of the time, as measured by the metrics of the use of scripts and video/graphics . Further, the stations used the same reporter for the story thirty-nine percent of the time (see Table 3). Before the LMA was implemented, KDVR and KWGN would not have had either the opportunity or the inclination to operate in such a manner. They were competitors in the market. However, the LMA changed that relationship. That was its stated purpose. By definition, the use of the same script and the same video/graphics for stories that were presented on two broadcasts reduced the production costs of those stories and achieved some economies of scale. Therefore, it should not be a surprise that the firms acted in a way to take advantage of the intended benefits of the Local Management Agreement. To do otherwise would have rendered the agreement moot.

Jacksonville

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The Jacksonville Television Market

In 2011, Jacksonville, Florida was ranked as the 49th largest media market in the U.S., with nearly 680,000 homes and a population of over 1.5 million inhabitants (Nielsen, 2011)). The television market consists of five stations, WAWS, WTEV, WTLV, WJXX, and WJXT. Compared to most television markets in the U.S., Jacksonville's local television media system is unusual in that it has one operating Shared Services Agreement (WAWS & WTEV) and one duopoly (WTEV & WTLV), leaving WJXT as the only station that produces a daily newscast that is unaffiliated (neither managed nor owned) with another station in the market.

WAWS, owned by Newport Television, went on the air in February, 1981 as Jacksonville's first independent station (it joined the Fox network in 1986). Under a previous owner, Clear Channel Communications, WAWS was part of a 1993 local marketing agreement (LMA) with WTEV, the market's CBS affiliate through which Clear Channel managed WTEV. In July 2008, the owner of WAWS (Newport Television) and the owner of WTEV (High Plains Broadcasting) implemented a shared services agreement (SSA) and merged the two news departments, creating "Action News". The stations share resources, personnel and the studio. WAWS airs three hours of local news on weekdays, and 30 minutes on Saturdays and Sundays for a total of sixteen hours of local news broadcasting per week (TitanTV Listings, 2011). The station's web site is a combination of both, WAWS and WTEV, and they use the same web address to access both stations' online content. The only difference is the advertising contact person, which varies depending on the station.

WTEV-TV, the CBS-affiliated television station, is owned by High Plains Broadcasting. It began broadcasting in August, 1980 as primarily a Christian station, however, over time, the religious programming was discontinued (McAllister, 2002). In 1990, the station was sold to Krypton Broadcasting, and three years later the company filled for bankruptcy. The station went to the hands of RDS Broadcasting, and entered into a Local Marketing Agreement with Clear Channel Communications who owned WAWS. As mentioned above, in July 2008, WAWS and WTEV merged their two news departments and created "Action News." Today, WTEV is operated by Newport Television through a shared services agreements (SSA) with its sister station WAWS. The station's news team (fifteen staff persons) is the same as its sister station, WAWS (Action News Team). WTEV broadcasts 4.5

hours of local news on weekdays, and 3 hours during weekends (TitanTV Listings, 2011) for a total of 25.5 hours of local news. There is only one web site for both stations.

WTLV is the NBC affiliate station that is part of the duopoly with the ABC affiliate, WJXX. Gannett owns both stations. The station began broadcasting on September 1957. In 1988 Gannett bought WTLV and in 2000, it purchased WJXX, and it moved the station to WTLV's studio. Both stations merged resources and staff. As a result, First Coast News was created, and it airs on both stations everyday. WTLV broadcasts 3 hours of local news on weekdays, and 2 hours on weekends (TitanTV Listings) for a total of 17 hours of local news. Besides sharing studios, staff and content, both stations have the same web site address. The stations claim to have 185 employees in the fields of news, engineering, production, promotions, accounting, sales, programming, and administrative support (About First Coast News, 2011). The two stations use the same web site for all their online content.

WJXX is the ABC-affiliated television station and it is owned by Gannett as part of a duopoly with WTLV. It first went on the air in February, 1997 under the ownership of WPR, L.P. and it was operated by Allbritton Communications through a local marketing agreement (LMA). In 2000, Allbritton sold WJXX to Gannett Company, and WJXX moved into the WTLV studio where the stations combined operations; however, WJXX staff was reduced. Merging the stations created First Coast News and it airs on both stations daily. WJXX airs 2.5 hours of local news Monday through Friday, and 2 hours on weekends for a total of 14.5 hours of local news broadcasts per week (TitanTV Listings, 2011). WJXX refers to the same 185 persons that WTLV identifies as the staff of the operation.

WJXT is the independent television station in Jacksonville. It began broadcasting in September, 1949, as the second television station in the state of Florida. In 1953, Washington Post Company bought the station, and it changed the call letters to the current WJXT-TV. For more than 50 years, the station was affiliated to CBS, but in 2002, the negotiations to renew the affiliation agreement with CBS failed, and WJXT became an independent station. Today, it airs a combination of syndicated programs and locally produced newscasts. WJXT broadcasts six hours of local news Monday through Friday, and 3 hours during the weekend for a total of 33

hours of local news per week (TitanTV Listings, 2011). WJXT news is composed of twenty-five staff persons, including anchors, reporters, weather and sports (WJXT News Team, 2011).

The constructed week for the Jacksonville market that comprised the sample of broadcasts began on Thursday, June 16 and ended on Wednesday, July 20, 2011. The newscasts that were captured represented the most appropriate combination of broadcasts to make comparison possible. That meant that the sample was composed of the 30-minute 6 pm newscasts of four of the stations, including WTEV (one half of the SSA), both of the duopoly stations (WTLV and WJXX) and the independent station (WJXT) and the 60-minute 10 pm newscast the other SSA station (WAWS). During the constructed week, 336 stories were presented across the newscasts with the following distribution: WAWS=125; WTEV=55; WTLV=54; WJXX=54; WJXT=48.

Ratings: According to Nielsen, the newscasts experienced a wide range of ratings in May 2011.[8] It is notable that the independent station, WJXT, was the ratings leader with 5.2 rating and a 10 share, followed closely by one of the duopoly stations, WTLV, with a 4.7 rating and a 9 share. The other duopoly station, WJXX, had the smallest audience, by far, among all of the stations with a 1.1 rating and a 2 share. The SSA stations had ratings that were very similar with WTEV registering a 3.3 rating and a 6 share for its 6 PM broadcasts while WAWS achieved a 3.5 rating and a 5 share for its 10 pm newscast. Although, it was not part of the sample, the 10 PM newscast of the independent station, WJXT, also won the 10 PM slot with 4.3 rating and a 7 share (Nielsen, Licensed Data, 2011).

Distribution of Individual Stories

The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=336) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast **only** on the SSA stations **individually** appeared either only on WAWS **or** WTEV and nowhere else. Likewise, the stories that were reported **only** on the **combination** of the SSA stations were broadcast on the two SSA stations, and nowhere else. Further, the stories that were reported on both duopoly stations included those stories that appeared only on the duopoly or on the duopoly and other stations.

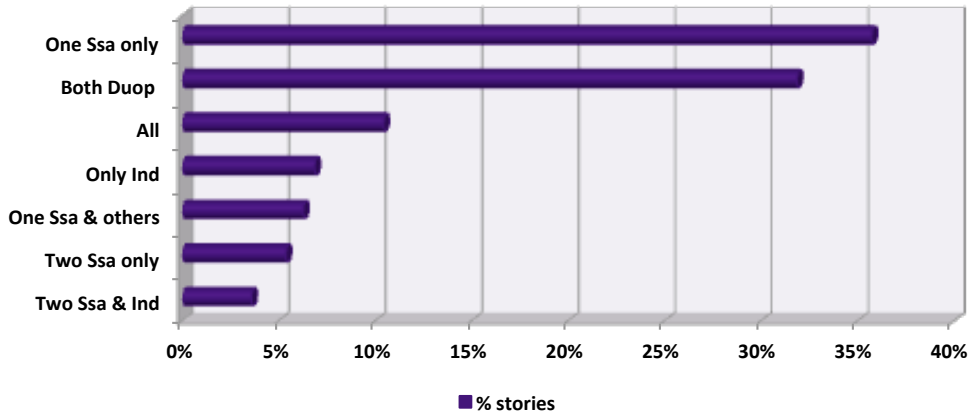
[8] Rating is the percentage of all television households tuned to a specific station. Share is the percentage of households tuned to a specific station at a specific time.

The most important feature of the duopoly distribution was that in every case the duopoly stories appeared on both duopoly stations because their broadcasts were simulcast. That is, regardless of the channel to which the audience tuned for the 6 pm newscast, the viewers of WLTV and WJXX saw the exact same content. Each of the appearance categories was mutually exclusive. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations within the station groups as defined by the SSA, duopoly and the independent station. The graphs that follow indicate the findings for each of the specific distributions across the stations.

Distribution of all stories

It is important to note that the durations of the broadcasts had some effect on the distribution of stories across the stations. The fact that WAWS presented a one-hour newscast (in contrast to the 30-minute newscasts for the other stations) resulted in over one-third of the stories (36%) appearing one one or the other SSA stations (the overwhelming majority of the stories were on WAWS). Just under one-third of the stories (32%) were broadcast on the duopoly combination. About ten percent of the stories were broadcast across **all** stations and another seven percent were broadcast **only** on the independent station. Interestingly, the SSA combination only accounted for about five percent of the distribution of the stories. Essentially, the distribution of stories was dominated by the one SSA station (WAWS) and the duopoly combination (Fig. 3).

Fig. 3: Distribution of all stories across all stations (N=336)



Sharing Resources: Of all of the 336 stories that were broadcast in Jacksonville, just over half of them (172) were presented on both of the duopoly stations and the SSA stations. Given that the purpose of the LMA was to reduce the cost of news production, I examined how some crucial resources were used among the stations. Specifically, I examined the stories along four dimensions: use of anchors; use of reporters; use of scripts; and the use video/graphics. There was a significant difference in the use of these resources by the duopoly combination and the SSA stations. The duopoly simulcast their newscasts on both stations at the same time and, by definition, they used the same anchor, reporter, script and video/graphics 100 percent of the time (Table 8). On the other hand, for the stories that were presented on both of the SSA stations, the same anchor was used to introduce the story almost two-thirds of the time. The same script was used about one-fifth of the time (21%) and the same video/graphics was used almost half of the time (47%). By these measures, the SSA and the duopoly combinations had a significant effect on the diversity of the news stories that the Jacksonville viewers saw.

Table 8: Distribution of Anchor, Reporter, Script, Video on LMA stations

	Same Anchor %	Same Reporter %	Same Script %	Same Video/ Graphic %
Duopoly combination stories (n=108)	**100**	**100**	**100**	**100**
SSA combination stories (n=64)	**64**	**14**	**21**	**47**

Story Type & Local vs. non-Local stories

The distribution of the types of stories that were covered by the SSA, duopoly and independent stations was significantly different across the station types (Table 9). Crime stories were prominent across all station types, but slightly more so (24%) for the SSA stations. The coverage of public issues was relatively similar across all of the stations accounting for about about one-fifth of the stories. On both the duopoly and independent stations, human interest was the most prominent story type (26%). The coverage of government/politics on the duopoly stations (17%) was significantly higher than that proportion for either the SSA or independent stations (9 and 7 percent, respectively).

Table 9: Story Type* across SAA & Duopoly & Independent stations			
Story type	**SSA stations**	**Duopoly stations**	**Independent station**
Crime	**24**	**20**	**23**
Public Issues	**23**	**19**	**20**
Human Interest	**22**	**26**	**26**
Other**	**22**	**18**	**24**
Govt/Politics	**9**	**17**	**7**
Total	***100***	***100***	***100***

p=<.05. *=percentage of stories; **=fires, accidents, etc.

The coverage of local vs non-local stories was also significantly different across the station types (Table 10). The independent stations recorded the highest proportion of local stories (88%). The duopoly stations had the second highest proportion of local stories (70%) while the SSA stations covered local issues over half of the time (53%).

Table 10: Local stories* across SSA, Duopoly & Independent stations			
	SSA stations	**Duopoly stations**	**Independent station**
Local stories	**53**	**70**	**88**

p=<.05. *=percentage of local stories

Production Factors: Presentation Mode, Block, Duration

In addition to content, ***how*** stories were presented on the newscasts was an important factor to consider. That overall consideration was manifest in the production factors of presentation mode, placement of the story within the newscast (as defined by block) and duration of the story. In the Jacksonville market one of the SSA stations, WAWS, produced a 60-minute newscast at 10 pm while the other stations' broadcasts were 30 minutes long.

Presentation Mode: There was a significant difference among the stations regarding presentation modes (Table 11). The stations used the voice-over by anchor mode more frequently than any other with the SSA stations registering the highest proportion (65%). The package mode was used much less frequently. The duopoly stations used it for about one-third of the stories (35%) while the SSA stations used the package mode for only about one-quarter (24%) of the stories.

Table 11: Presentation mode across across SSA, Duopoly & Independent stations*

	SSA stations	Duopoly stations	Independent station
Voice-over by anchor	**65**	**44**	**52**
Package	**24**	**35**	**31**
Other**	**11**	**21**	**17**
Total	***100***	***100***	***100***

p=<.05. *=percentage of stories; **=anchor-read, live location, reporter in newsroom.

Placement: The differences in the length of the broadcasts between the station types was also evident in the placement of the stories within the broadcasts. I defined placement as block, the periods of the newscast separated by commercial breaks. Therefore, block 1 represents the period from the opening of the show to the first commercial break. It is typically the longest block in which the most important stories of the day (as defined by placement) are presented. Block 2 represents the second such period (between the first and second commercial breaks). The blocks after the third commercial break were collapsed in order to aid the analysis.

There were statistically significant differences among the station types regarding story placement. The SSA stations had fewer stories in the first block (42%) and more stories in the blocks 3+ (41%) than the other two station types because one of the SSA stations (WAWS) produced the only 60-minute newscast and that provided the extra time required to place stories later in the broadcast. By contrast, the duopoly stations presented almost two-thirds (63%) of their stories in the first block and no stories after Block 2. The content of the later blocks was the sports and weather *segments*, neither of which was included as a separate story in this analysis (as explained earlier in this report). The independent station placed

almost six out if ten stories (58%0 in the first block with an equal distribution (21%) for both the second block and the blocks after that period (Table 12).

Table 12: Placement of stories across SSA, Duopoly & Independent stations*

	SSA stations	Duopoly stations	Independent station
Block 1	**42**	**63**	**58**
Block 2	**17**	**37**	**21**
Block 3+	**41**	**0**	**21**
Total	*100*	*100*	*100*

p=<.05. *=percentage of stories

Duration: The duration of stories was significantly different across the station types and that was particularly apparent for the independent station (Table 13). Although its broadcast was 30 minutes, its stories were, on average, significantly longer (95 seconds) than those for either the SSA

Table 13: Presentation mode & Duration* across SSA, Duopoly & Independent stations

	SSA stations	Duopoly stations	Independent station
Voice-over by anchor	**35**	**39**	**45**
Package	**130**	**134**	**154**
Other**	**39**	**39**	**53**
All modes	*59*	*73*	*95*

p=<.05. *=mean number of seconds **=anchor-read, live location, reporter in newsroom.

(59 seconds) and the duopoly stations (73 seconds). Further, its stories were longer than the other station types across all presentation modes. That was most evident in the package mode in which it utilized, on average, 154 seconds compared to 130 seconds for the SSA stations. That is an important difference because time is the

most scarce commodity of a broadcast and how it is used reflects the judgement of the station regarding its approach to conveying the content of the stories it selects to broadcast. A newscast is a zero-sum game. If some stories are in, then others are out, and the more time that is used for one story means that the possibility of introducing other stories is limited.

Summary

The Jacksonville DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License) contains a combination of stations that deliver a regularly scheduled newscast with an ownership or management profile that is not usually found in other markets. There are two stations that operate under a shared services agreement, WAWS and WTEV, and two stations that are part of a duopoly, WLTV and WJXX. That leaves only one station, WJXT, that operates as an independent entity (as defined by the ownership or management profile). WJXT is the ratings leader, followed closely by one of the duopoly stations, WTLV. The most striking feature of the newscasts in the Jacksonville television market was the simulcast of the broadcasts of the duopoly stations. Viewers of the newscasts saw exactly the same stories presented in exactly the same way. The only difference was that the stations ran different commercials during the newscasts. By definition, that phenomenon did not exist before the duopoly was implemented. By contrast, the SSA combination of stations used the same resources of anchor, reporter, script and video less frequently than the duopoly combination. However, the overlap was still significant for the anchor (64%) and video/graphics (47%).

Television is pictures and using the same video/graphics to convey the content of a story almost half of the time will yield a very similarly framed account of the event. The Jacksonville market operates under a condition in which the duopoly has effectively removed one "voice" from the market with its simulcast and, to a lesser extent, the SSA stations used the arrangement to achieve some economies of scale to produce their newscasts.

Even with these conditions, we should note that there were differences among the station types regarding what they covered and how they covered it. To wit: the duopoly stations covered more government/politics while the independent station carried, by far, the most local stories. The independent station's stories were, on average, much longer than either the SSA or duopoly stations' stories, even though it produced a 30-minute broadcast.

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D. Yanich, University of Delaware

Dayton

42

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The Dayton Television Market

In 2011, the Dayton, Ohio DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License) was the 62nd largest television market with a population of 527,030 television households (Nielsen, 2011). The Dayton television market consists of five television stations that deliver locally-produced news broadcasts, WDTN, WBDT, WKEF, WRGT, and WHIO. Both WDTN and WBDT are part of a Local Marketing Agreement, while WKEF and WRGT operate under a Shared Service Agreement.

WDTN is the NBC-affiliated television station and is owned by the LIN TV Corporation. In March, 1947 WDTN was granted a license to operate by the Crosley Broadcasting Corporation and it has switched its affiliation between ABC and NBC over time. In June 2010 the owner of WDTN announced that it would enter into a local marketing agreement with the owner of WBDT, the CW affiliate.

WBDT is the CW affiliated station. It is owned and operated by WBDT Television, LLC and its sister station WDTN. It first started out as independent station, WSWO-TV, under the ownership of Southwestern Ohio. After the demise of WSWO-TV, this station returned as a Christian-oriented station, WTJC, under the ownership of Miami Valley Christian Television (MVCT). The station was sold to ACME Communications, which dropped most of the station's previous programming for a primary affiliation with The WB.

As mentioned above, in June 2010 LIN TV would begin operating CW affiliate WBDT through a local marketing agreement. (Malone, 2010). However, three months later, LIN TV exercised an option to purchase WBDT. As of May 20, 2011, FCC licenses, programming agreements, and related assets for WBDT were sold to WBDT Television, LLC and the remaining WBDT assets were sold to LIN Television Corporation. (Wall Street Journal, 2011).

Both WDTN and WBDT operate under the news slogan, "On Your Side". WDTN employs 6 anchors and 7 reporters. (News Team, 2011). A list of current news staff for WBDT was not available on the website.

WKEF is the ABC affiliated station in Dayton. It began broadcasting in August 1964 under the ownership of Brush-Moore Newspapers with the call sign of WONE. It is presently owned by the Sinclair Broadcast Group. Running with the slogan, "Its Where you Live" WKEF broadcasts a half-hour nightly newscast called ABC 22 Dayton's News Source at 6. WKEF employs six anchors and four reporters.

WRGT-TV is the Fox-affiliated station in the market. It began broadcasting in 1998. The station is owned by Cunningham Broadcasting but it is operated the Sinclair Broadcast Group through a local marketing agreement (LMA).

The WKEF and WRGT local marketing agreement is the result of accommodations that were made in response to FCC ownership rules. In 1998, Sinclair bought WKEF in a group deal from Sullivan Broadcasting and became its (Sullivan's) managing partner. However, at that time, Sinclair was also managing WGRT. Sinclair purchased most of Sullivan's other stations but could not buy WRGT because the Dayton market has only seven full-power stations and FCC rules require a market to contain, at least, eight such stations to permit a duopoly. Therefore, WRGT was sold to Glencairn, Ltd (now Cunningham Broadcasting). It is important to note, however, that nearly all of Glencairn/Cunnigham's stock was controlled by trusts in the name of the Smith family who were the founding owners of Sinclair. Although the arrangement between WFEF and WRGT is listed as a local marketing agreement, the stations share the same studios and news operation, much like a shared services agreement. Both stations' websites are exactly the same except for the station logo that appears in the upper left corner.

WHOI is the CBS- affiliated television station and it the only one of the five stations that regularly produce a newscast that is not part of a local marketing agreement within the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License). This station is owned by Cox and it was not the first station in Dayton to have its license granted, it was the first to start broadcasting in February, 1949. Aside from aired some programming from the Dumont Television Network during its first three years on the air, WHIO is also the only station in Dayton to have never changed its primary affiliation. Running with the slogan, "Coverage You Can Count On", WHOI broadcast a half-hour newscast at 6pm. This station employs eight anchors and ten reporters.

The constructed week for the Dayton market that comprised the sample of broadcasts began on Wednesday, May 4 and ended on Tuesday, June 7, 2011. The newscasts that were captured represented the most appropriate combination of broadcasts to make comparison possible. All of the newscasts were 30 minutes in length. The newscasts were: for one LMA combination of stations (which I will call LMA1 in this analysis), WKEF (at 6pm) and WRGT (at 6:30pm). The second LMA combination of stations (LMA2) consisted of WDTN at 6:30pm and WBDT, at 10pm. The 6pm broadcast of WHIO, the independent station, completed the sample of broadcasts. During the constructed week, 366 stories were presented across the newscasts with the following distribution: WHIO=100; WBDT=79; WDTN=64; WKEF=63; WRGT=60.

Ratings: According to Nielsen, the newscasts experienced a wide range of ratings in May 2011.[9] It is notable that the independent station, WHIO, was the ratings leader by a very large margin with 13.6 rating and a 24 share, almost equal to the share of all of the other stations combined, regardless of the time slot. The stations of LMA1, WKEF and WRGT registered similar ratings at 3.2 and 2.6, and shares of 6 and 5, respectively. The difference in performance between the LMA2 stations was more pronounced with WDTN showing a rating of 6.5 and a share of 11, while its sister station, WBDT, registered a 3.2 rating and a 5 share (Nielsen, Licensed Data, 2011).

Distribution of Individual Stories

The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=366) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast **only** on the LMA1 stations **individually** appeared either only on WKEF **or** WRGT and nowhere else. Likewise, the stories that were reported **only** on the **combination** of the LMA1 stations were broadcast on those stations, and nowhere else. The same logic was applied to the stories that appeared on the LMA2 stations, WDTN and WBDT. Each of the appearance categories was mutually exclusive. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations within the station groups as defined by the LMA1, LMA2 and the independent station. The graphs that follow indicate the findings for each of the specific distributions across the stations.

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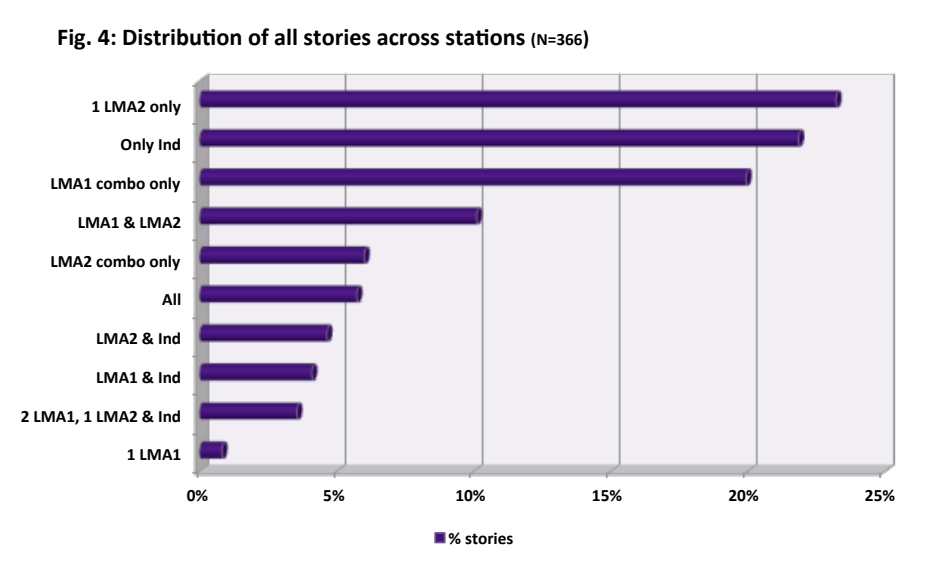
[9] Rating is the percentage of all television households tuned to a specific station. Share is the percentage of households tuned to a specific station at a specific time.

Distribution of all stories

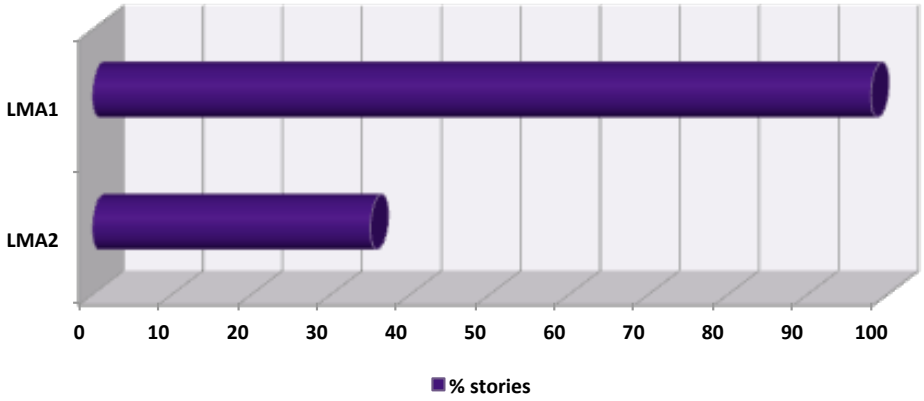
The distribution of stories across the stations followed a particular pattern. Almost one-quarter (23%) of the stories were broadcast on ***one or the other*** of the LMA2 stations. That is, the story appeared either on WDTN or WBDT, and nowhere else (Fig. 4). That is in contrast to the proportion of stories that appeared on the LMA2 combination ***only*** (6%). The second highest proportion of stories (22%) appeared only on the independent station (the ratings leader by a large



margin). That was followed by about one-fifth of stories that were broadcast on the LMA1 combination only. Another ten percent of the stories were broadcast on the LMA1 combination and on one of the LMA2 stations. A striking feature of the distribution of stories was that less than one percent were broadcast on only one LMA1 station.

The stories that were broadcast on the LMA stations prompted a closer look at the distribution on both of the LMA combinations. There was a significant difference in their broadcast behavior. The LMA1 station group (WKEF and WRGT) broadcast virtually all (98%) of their stories on the combination of the two stations (Fig 5). That includes the stories that were also broadcast on other stations. The point is that when the LMA1 group broadcast a story, it appeared on both stations' broadcasts. By contrast, just over one-third (35%) of the stories on the LMA2 stations were broadcast on both stations in the group.

Fig. 5: Distribution of combination stories across LMA groups



Sharing Resources: Given that the purpose of the LMA was to reduce the cost of news production, I considered how some crucial resources were used among the stations. Specifically, I examined the stories along four dimensions: use of anchors; use of reporters; use of scripts; and the use video/graphics. There was a significant difference in the use of these resources by the LMA1 and LMA2 stations. For the stories that were broadcast on both stations of the LMA1 combination, the overwhelming proportion of them (97%) used the same anchor, script and video/graphics (Table 14). Just over one-third of the time (37%) did the same reporter convey the story. By contrast, the stories that appeared on the LMA2 combination shared the resources less frequently, although over half of the time (52%) they shared the same script and 80 percent of the stories used the same video/graphics. By these measures, the LMA combinations had a significant effect on the diversity of the news stories that the Dayton viewers saw.

Table 14: Distribution of Anchor, Reporter, Script, Video on LMA stations

	Same Anchor %	Same Reporter %	Same Script %	Same Video/ Graphic %
LMA1 combination stories (n=158)	**97**	**37**	**97**	**97**
LMA2 combination stories (n=67)	**31**	**14**	**52**	**80**

Story Type & Local vs. non-Local stories

The types of stories that were broadcast across the station types were different, although not statistically so. For example, the independent station broadcast the smallest proportion of crime stories (25%) and the highest percentage of public issues stories (30%) across the station types (Table 15). On the other hand, over half of the stories on the LMA1 stations consisted of equal parts crime (27%) and human interest (27%). The coverage of government/politics comprised the smallest proportion of stories across all of the station types with the highest percentage on the independent station, but only seven percent (Table 15).

Table 15: Story Type* across LMA1, LMA2 & Independent stations

Story type	LMA1 stations	LMA2 stations	Independent station
Crime	**27**	**32**	**25**
Public Issues	**24**	**26**	**30**
Human Interest	**27**	**30**	**23**
Other**	**16**	**10**	**15**
Govt/Politics	**6**	**2**	**7**
Total	***100***	***100***	***100***

***=percentage of stories; **=fires, accidents, etc.**

The coverage of local vs. non-local stories was significantly different across the station types (Table 16). The LMA1 stations broadcast the highest percentage of local stories (87%) while roughly only seven out of ten stories on the LMA2 and independent stations were local.

Table 16: Local stories* across LMA1, LMA2 & Independent stations

	LMA1 stations	LMA2 stations	Independent station
Local stories	**87**	**73**	**70**

p=<.05. *=percentage of local stories

Production Factors: Presentation Mode, Block, Duration

In addition to content, ***how*** stories were presented on the newscasts was an important factor to consider. That overall consideration was manifest in the production factors of presentation mode, placement of the story within the newscast (as defined by block) and duration of the story.

Presentation Mode: There was a statistically significant difference among the stations regarding presentation modes (Table 17). Across all of the stations the voice-over by anchor mode accounted for a majority of the stories (between 60 and 66 percent). The most significant differences were those between the LMA1 stations, on one hand, and the other two station types on the other. Specifically, the LMA1 stations used the package presentation mode (the most extensive approach) only half of the time than their market counterparts (10%, vs 20% and 22% for the LMA2 and independent stations, respectively). Conversely, the LMA1 stations utilized the least expensive production modes (those in the ***other*** category) more than twice as much as the other stations in Dayton (30% vs 14% each for the LMA2 and independent stations). This is an important point because the LMA1 stations shared the resources of anchor, reporter, script and graphics/video almost all of the time (see Table 14).

Table 17: Presentation mode across across LAM1, LMA2 & Independent stations*

	LMA1 stations	LMA2 stations	Independent station
Voice-over by anchor	**60**	**66**	**63**
Package	**10**	**20**	**22**
Other**	**30**	**14**	**14**
Total	***100***	***100***	***100***

p=<.05. *=percentage of stories; **=anchor-read, live location, reporter in newsroom.

Placement: The differences in the length of the broadcasts between the station types was also evident in the placement of the stories within the broadcasts. I defined placement as block, the periods of the newscast separated by commercial breaks. Therefore, block 1 represents the period from the opening of the show to the first commercial break. It is typically the longest block in which the most important stories of the day (as defined by placement) are presented. Block 2

represents the second such period (between the first and second commercial breaks). The blocks after the third commercial break were collapsed in order to aid the analysis.

There were statistically significant differences among the station types regarding story placement and that was most clear when the LMA station groups were compared with the independent station (Table 18). The LMA station groups presented over half of their stories in the periods ***after*** the first block (60% for LMA1 and 52% for LMA2). By contrast, the independent station presented over two-thirds (68%) of its stories in the first block and an equal percentage of stories in Block 2 and Block 3+. Most typically the content of the later blocks contains the sports and weather ***segments***, neither of which was included as a separate story in this analysis (as explained earlier in this report). However, it was clear from this analysis that the LMA stations treated the distribution of their stories across the duration of the newscasts much differently than their independent station counterpart.

Table 18: Placement of stories across LMA1, LMA2 & Independent stations*

	LMA stations	LMA2 stations	Independent station
Block 1	**40**	**48**	**68**
Block 2	**18**	**30**	**16**
Block 3+	**42**	**22**	**16**
Total	***100***	***100***	***100***

p=<.05. *=percentage of stories

Duration: The duration of stories was statistically significantly different across the station types and that was particularly apparent for the independent station (Table 19). However, for the presentation mode that was used over sixty percent of the time across all stations (voice-over-by-anchor), the average duration of the stories was within five seconds across the station types (39, 38 & 34 seconds for LMA1, LMA2 and the independents stations, respectively). The difference in the average length of stories was much more evident in the package mode in which the LMA1 stations used the most time (117 seconds). The largest variation in average length of story occurred in the ***other*** presentation modes as the independent station

used only 49 seconds compared to the 84 seconds used, on average, by the LMA2 stations.

Table 19: Presentation mode & Duration* across LMA1, LMA2 & Independent stations

	LMA1 stations	LMA2 stations	Independent station
Voice-over by anchor	**39**	**38**	**34**
Package	**117**	**94**	**105**
Other**	**74**	**84**	**49**
All modes	*57*	*56*	*52*

p=<.05. *=mean number of seconds **=anchor-read, live location, reporter in newsroom.

Summary

The most prominent feature of the newscasts of the Dayton television market was the difference in the effect of the local marketing agreements on the newscasts of the LMA1 and LMA2 station groups. Stories that were broadcast by the LMA1 station group were invariably (98% of the time) presented on both stations. That approach to the newscast was also seen in the wholesale sharing of resources such as anchor, reporter, script and video/graphics. Conversely, the LMA2 station group used both stations for the stories only about one-third of the time. This would seem to suggest that the managers of both station groups saw the purpose of the LMA differently. However, perhaps a better explanation is possible in a closer examination of the conditions of both agreements. The LMA1 station group was operated by Sinclair Broadcasting and its stations shared the same newsroom and, in large measure, the same news staff, much like the more complete arrangements that are characterized by a shared services agreement. In fact, the LMA1 station group behaved as if it were operating under a shared services agreement. The "shared" resources of the LMA1 stations clearly went beyond just marketing and the station group acted in that manner.

Des Moines

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The Des Moines Television Market

The Des Moines, Iowa television market has a population of over one million inhabitants and almost 433,000 television households, making Des Moines the 73rd largest DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License) in the country (Nielsen, 2011). The market consists of four main stations, KDSM, WHO, WOI, KCCI. Two of these stations, KDSM and WHO, are partners under a Shared Service Agreement (SSA).

KDSM is the Fox-affiliated television station in the Des Moines market. It was Iowa's first television station, and it went on air in 1953, under KGTV call letters. Due to financial problems, the station went off air after only a year (Stein, 2004). Currently, it is owned by the Sinclair Broadcast Group and the station airs 60-minute local newscasts from Monday to Friday, and 30-minute broadcasts on Saturdays and Sundays (TitanTV Listings, 2011), for a total of 6 hours of local news per week. On September 2nd 2008, the station initiated a shared service agreement with WHO-TV, the NBC affiliate. The KDSM web site does not specify the news staff members or other employees, but the company profile information indicated that the staff size ranges between 20 to 49 employees (Company profile Fox 17, 2011).

WHO-TV is the NBC affiliate in Des Moines. WHO-TV signed on the air in April 1954 as the second television station in the market. The original owners, the Palmer family, sold their broadcast holdings in 1996 to The New York Times Company. In 2007 the New York Times sold its television stations and Local TV LLC became the owner of WHO-TV (NewsInc, 2007). In December of the same year, the Tribune Company and Local TV agreed to form a "broadcast management company" to provide management and shared services to both Tribune Company's and Local TV's stations (Tribune.com, 2007). As mentioned above, in September 2008, WHO-TV entered into a shared service agreement with KDSM, the Fox affiliated station in the market. Today the station broadcasts over 28 hours of local news. 4.5 hours on weekdays, 3 hours on Saturdays and 3.15 hours on Sundays (TitanTV Listings, 2011).

WOI is the ABC affiliate television station in Des Moines. It was "the first television station owned and operated by a United States institution of higher education" (Iowans for WOI-TV, Inc., 1991-1994). During the station's

early years, it carried educational programming as well as programming from other networks, but it was a primary CBS affiliate. In March 1994, WOI-TV was sold to Capital Communications Company. Its news department broadcasts four hours of local news during weekdays and one hour on Saturdays and Sundays (TitanTV Listings, 2011), for a total of 22 hours of local news broadcasting per week. WOI's web site provides information for thirteen of its news staff members (Myabc5.com, 2011), however, there is a total of 70 employees in the station (Company Profile ABC5, 2011).

KCCI is the CBS affiliate in Des Moines and it has been part of CBS through its entire history. KCCI began broadcasting in July, 1955, as KRNT-TV, the third television station in the market. It was originally owned by the Cowles family, publishers of local newspapers and owners of radio stations in the area. In 1974, KRNT became KCCI, with the initials standing for Cowles Communications, Inc. It has had several owners and today it is owned by Hearst Television. The station broadcasts 4.5 hours of local news on weekdays, 3 hours on Saturdays, 4.5 hours on Sundays for a total of 30 hours of local news per week (TitanTV Listings, 2011). The KCCI website lists 26 employees in the newsroom including weather and sports (KCCI-TV.com, 2011).

The constructed week for the Des Moines market that comprised the sample of broadcasts began on Thursday, May 5 and ended on Wednesday, June 8, 2011. The newscasts that were captured represented the most appropriate combination of broadcasts to make comparison possible. Three of the newscasts were 30 minutes and one was 60 minutes. The sample included: the 60-minute KDSM at 9pm; the 30-minute 6pm newscasts of WHO, WOI and KCCI. During the constructed week, 329 stories were presented across the newscasts with the following distribution: KDSM=116; WOI=97; KCCI=60; and WHO=56.

Ratings: According to Nielsen, the newscasts experienced a wide range of ratings in May 2011.[10] It is notable that one of the the independent stations, KCCI, was the ratings leader by a very large margin with a 12.4 rating and a 31 share, more than the combined ratings of its competitors in the 6pm slot. WHO (one of the SSA stations) achieved a 9.5 rating and a 23 share, while the other

[10] Rating is the percentage of all television households tuned to a specific station. Share is the percentage of households tuned to a specific station at a specific time.

independent station, WOI, was almost non-existent with a 1.1 rating and a 3 share. At 9pm the other SSA station, KDSM, mustered a 4.1 rating and a 13 share (Nielsen, Licensed Data, 2011).

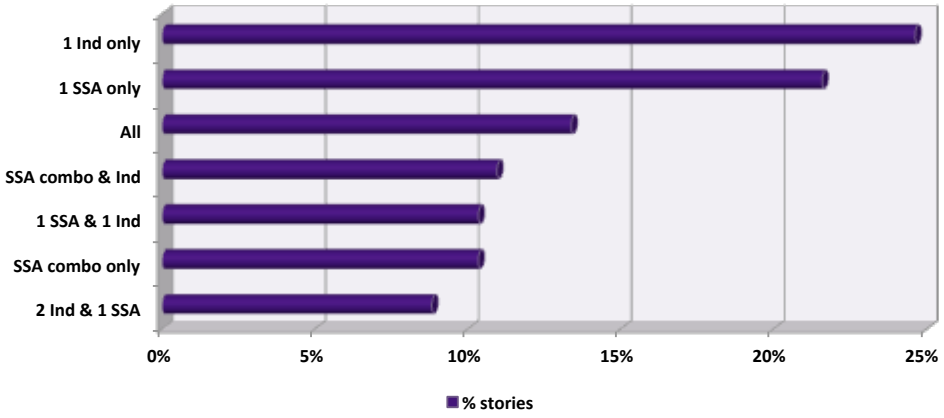
Distribution of Individual Stories

The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=329) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast **only** on the SSA stations **individually** appeared either only on KDSM **or** WHO and nowhere else. Likewise, the stories that were reported **only** on the **combination** of the SSA stations were broadcast on **both** of those stations, and nowhere else. The same logic was applied to the stories that appeared on the independent stations, WOI and KCCI. Each of the appearance categories was mutually exclusive. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations within each station group as defined by the SSA and the independent stations. The graphs that follow indicate the findings for each of the specific distributions across the stations.

Distribution of all stories

The distribution of the stories across the stations was affected by the difference in the length of broadcasts. KDSM, with its 60-minute newscast had more time in which to present stories. That is evident in that about 22 percent of the stories were broadcast on one of the two SSA stations only (Fig. 6), however,

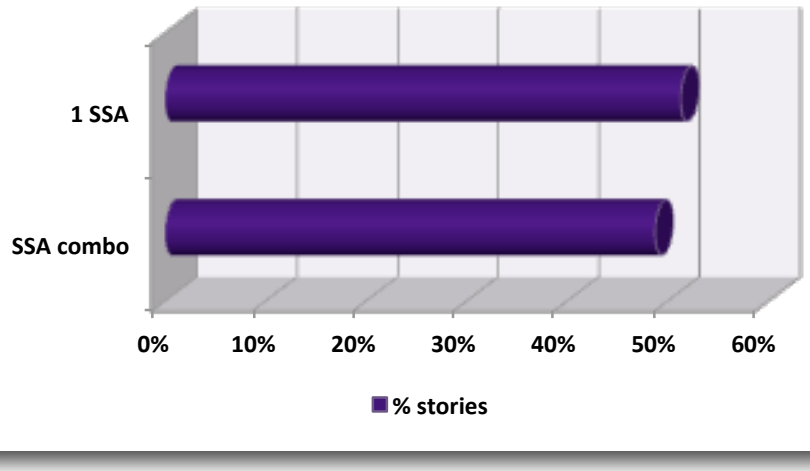
Fig. 6: Distribution of all stories across stations (N=329)



KDSM accounted for almost ninety percent of those stories. Stories that appeared on only one of the independent stations comprised the largest proportion within the distribution (25%). About thirteen percent of the stories were broadcast across all of the stations. As we might expect, the smallest proportion of stories appeared on both independent stations, even when they also appeared on one of the SSA stations (9%).

Given the focus of this research, the stories that were broadcast on the SSA stations prompted a closer look at that distribution. Specifically, for the 234 stories that were broadcast on the SSA stations, what proportion was presented on both stations? It is important to note that fewer than half of the stories (49%) that appeared on the SSA stations did so on the combination of the stations (Fig. 7). That is partly due to the fact that the length of the broadcasts was asymmetrical, one was sixty minutes (KDSM) and the other was thirty minutes.

Fig. 7: Distribution of SSA stories (n=234)



Sharing Resources: Given that the purpose of the SSA was to reduce the cost of news production, I considered how some crucial resources were used among the stations. Specifically, I examined the stories that were broadcast on **both** SSA stations along four dimensions: use of anchors; use of reporters; use of scripts; and the use video/graphics (Table 20). The resource that was shared most commonly was video/graphics (55% of the stories). The SSA stations did not share an anchor at all and shared a reporter on just over one-tenth (11%) of the stories. However, the same script was used over one-third (37%) of the time.

Table 20: Distribution of Anchor, Reporter, Script, Video on SSA stations				
	Same Anchor %	Same Reporter %	Same Script %	Same Video/ Graphic %
SSA combination stories (n=114)	0	11	37	55

Story Type & Local vs. non-Local stories

The types of stories that were broadcast across the station types were different, although not statistically so (Table 21). For example, the independent stations broadcast the highest proportion of crime stories (29%) and the lowest percentage of human interest stories (15%). On the other hand, the most prominent stories on the SSA stations was government/politics (23%). Even so, the independent stations also allotted a significant portion of stories to government/ politics (21%). That attention to the issue across stations was unlike any of the other television markets in the sample.

Table 21: Story Type* across SSA & Independent stations		
Story type	SSA stations	Independent stations
Govt/Politics	23	21
Public Issues	21	19
Other**	21	16
Crime	18	29
Human Interest	17	15
Total	*100*	*100*

*=percentage of stories; **=fires, accidents, etc.

There was a statistically significant difference in the proportion of local stories that were broadcast across the station groups (Table 22). For the the SSA stations, just over six out of ten (62%) of the stories covered local issues. On the other hand, three-fourths of the stories (75%) on the independent stations had a local focus.

Table 22: Local stories* across SSA & Independent stations		
Local/non-local stories	SSA stations	Independent stations
Local stories	62	75

p=<.05. *=percentage of local stories

Production Factors: Presentation Mode, Block, Duration

In addition to content, ***how*** stories were presented on the newscasts was an important factor to consider. That overall consideration was manifest in the production factors of presentation mode, placement of the story within the newscast (as defined by block) and duration of the story.

Presentation Mode: There was a statistically significant difference among the stations regarding presentation mode (Table 23). Both station types used the package mode for the same proportion of stories (17%). The differences occurred in the use of the other two presentation modes. The SSA stations relied almost two-thirds of the time (65%) on the voice-over-by-anchor versus half of the time for the independent stations. Further, the independent stations used the less expensive modes included in the ***other*** category for almost one-third (33%) of the stories.

Table 23: Presentation mode across SSA & Independent stations*		
	SSA stations	Independent stations
Voice-over by anchor	65	50
Package	17	17
Other**	19	33
Total	*100*	*100*

p=<.05. *=percentage of stories; **=anchor-read, live location, reporter in newsroom.

Placement: The differences in the length of the broadcasts between the station types was evident in the placement of the stories within the broadcasts. I defined placement as block, the periods of the newscast separated by commercial breaks. Therefore, block 1 represents the period from the opening of the show to

the first commercial break. It is typically the longest block in which the most important stories of the day (as defined by placement) are presented. Block 2 represents the second such period (between the first and second commercial breaks). The blocks after the third commercial break were collapsed in order to aid the analysis.

There was a statistically significant difference in the placement of the stories on the broadcasts across the station types (Table 24). The independent stations presented over two-thirds (69%) of their stories within the first block compared to just over half (53%) for the SSA stations. The 60-minute length of one of the SSA broadcasts (KDSM) had its effect regarding the 3+ blocks. Over one-third (34%) of the SSA stories were presented later in the broadcast as compared to just one percent for the independent stations. That is due, mainly, to the fact that KDSM had more time in which to present stories. Specifically, with KDSM's 60-minute broadcast, the SSA stations combined used 159 minutes for the news stories while the combined independent stations (with 30-minute newscasts) used 111 minutes. The independent stations did have later blocks in their newscasts, but they consisted overwhelmingly of the sports and weather ***segments*** which were not defined as separate stories in this research.

Table 24: Placement of stories across SSA & Independent stations*

	SSA stations	Independent stations
Block 1	**53**	**69**
Block 2	**13**	**30**
Block 3+	**34**	**1**
Total	***100***	***100***

p=<.05. *=percentage of stories

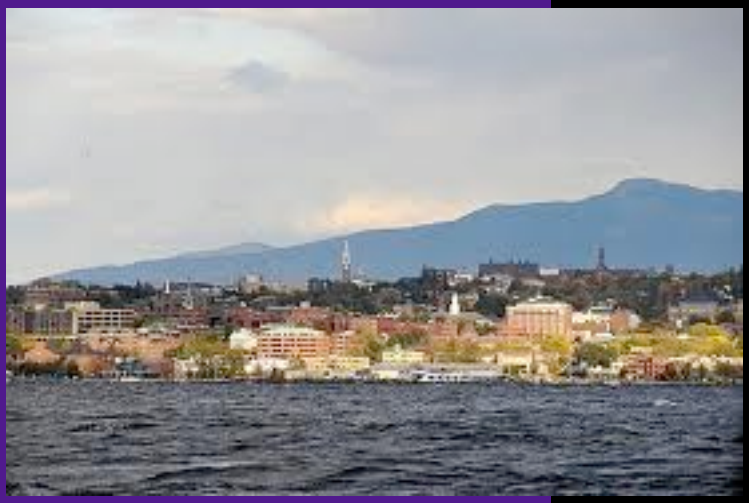
Duration: The differences in the amount of time that each of the station types had for their newscasts was evident in the duration of the stories across the presentation modes (Table 25). For both the voice-over-by-anchor and package modes, the SSA stations presented longer stories (41 and 143 average seconds, respectively) compared to the independent stations (30 and 121 average seconds, respectively). The stories that were presented using the ***other*** mode were, on average, very short (21 seconds) regardless of the station type. These differences

point to the inescapable fact that time is the most precious resource that news directors have at their disposal.

Table 25: Presentation mode & Duration* across SSA & Independent stations		
	SSA stations	Independent stations
Voice-over by anchor	**41**	**30**
Package	**143**	**121**
Other**	**21**	**21**
All modes	*58*	*43*
p=<.05. *=mean number of seconds **=anchor-read, live location, reporter in newsroom.		

Summary

A prominent feature of the market was the effect of the shared services agreement between KDSM and WHO on local newscasts. That arrangement produced a sharing of resources affected what the audience saw. Over one-third of the time, the SSA stations used the same script and over one-half of the time the SSA stations used the same video/graphics for stories that were broadcast on both stations. That would not have happened without the implementation of the SSA agreement. Another important feature of the newscasts of the Des Moines television market was the difference in the ratings of the newscasts. One independent station, KCCI, was the ratings leader by a very large margin. Further, the independent stations presented more local stories but they also presented more crime stories than the SSA stations.



Burlington

The Burlington Television Market

The Burlington, Vermont television market is ranked 95th in the U.S. with 330,730 television households (Nielsen, 2011). In the Burlington market four stations deliver a regular daily newscast: WVNY, WFFF, WCAX and WPTZ. WVNY and WFFF operate under a shared services agreement. WCAX and WPTZ are independent stations.

WFFF is a Fox-affiliated television station that is owned by Smith Media. WFFF also, operates ABC affiliate WVNY (owned by Lambert Broadcasting, LLC) through a shared services agreement (Jessell, 2010). The agreement was implemented in 2005. Finding a way to satisfy Federal Communications Commission (FCC) ownership rules, Smith Media partnering with Lambert Broadcasting and became the senior partner in SSA with WVNY.

WVNY is the ABC-affiliated television station that is owned by Lambert Broadcasting, LLC. In 2005, WVNY moved into WFFF's studios essentially creating one news department for the two stations. The websites for each of the stations identify the exact same news staff of four anchors and five reporters. In fact, the WVNY website goes so far as to specify that the news team is that of the Fox44 station (WFFF).

WCAX is affiliated with the CBS Television Network and has been locally owned by Mount Mansfield Television since the station's inception. WCAX-TV began as WCAX Radio at the University of Vermont's College of Agriculture. It was used to distribute information to farmers from its outreach program, the Extension Service. By the time it became WCAX Television, however, it had been purchased by C.P. Hasbrook, who also owned a local newspaper, the Burlington Daily News. Starting July 16, 2007, WCAX began to produce a weeknight 10 o'clock broadcast (WCAX.com, 2011). The station's website identifies a news staff that includes of nine anchors and nine reporters.

WPTZ is the NBC-affiliated television station owned by Hearst Television, and has its studios in Plattsburgh and transmitter located on Mount Mansfield in Vermont. The station began broadcasting in 1954. Through its Hearst ownership, WPTZ also

operates WNNE as a semi-satellite station. Its news staff includes five anchors and nine reporters.

The constructed week for the Burlington market that comprised the sample of broadcasts began on Friday, May 6 and ended on Thursday, June 9, 2011. The newscasts that were captured represented the most appropriate combination of broadcasts to make comparison possible. Two of the newscasts were 30 minutes in length, WVNY and WPTZ and two were 60 minutes in length, WFFF and WCAX. The sample included: the 60-minute WFFF newscast at 10pm; the 60-minute newscast of WCAX at 6pm; the 30-minute newscasts of WPTZ at 6pm and WVNY at 7pm. This sample included one 60-minute and one 30-minute newscast each for the SSA and independent station groups. During the constructed week, 374 stories were presented across the newscasts with the following distribution: WFFF=140; WCAX=102; WVNY=87; and WPTZ=45.

Ratings: According to Nielsen, the newscasts experienced a wide range of ratings in May 2011.[11] It is notable that one of the the independent stations, WCAX, was the ratings leader by a very large margin with a 12.7 rating and a 31 share. WPTZ (the other independent station) achieved a 8.5 rating and a 22 share. In contrast, the SSA stations registered significantly lower ratings. The WFFF broadcast at 10pm mustered a 2.0 rating and a 5 share. WVNY's ratings at 7pm were a 0.9 rating and a 2 share. (Nielsen, Licensed Data, 2011).

[11] Rating is the percentage of all television households tuned to a specific station. Share is the percentage of households tuned to a specific station at a specific time.

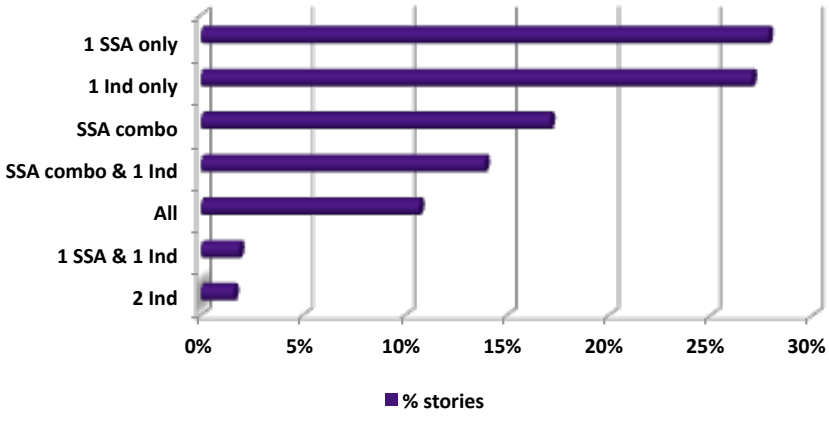
Distribution of Individual Stories

The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=374) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast **only** on the SSA stations **individually** appeared either only on WFFF **or** WVNY and nowhere else. Likewise, the stories that were reported **only** on the **combination** of the SSA stations were broadcast on **both** of those stations. The same logic was applied to the stories that appeared on the independent stations, WCAX and WPTZ. Each of the appearance categories was mutually exclusive. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations within each station group as defined by the SSA and the independent stations. The graphs that follow indicate the findings for each of the specific distributions across the stations.

Distribution of all stories

The distribution of the stories across the stations (Fig. 8) shows that a substantial proportion of the stories appeared either on one SSA station (28%) or one independent station (27%). That was followed by the proportion of stories that appeared on the SSA combination, and nowhere else (17%). A significant feature

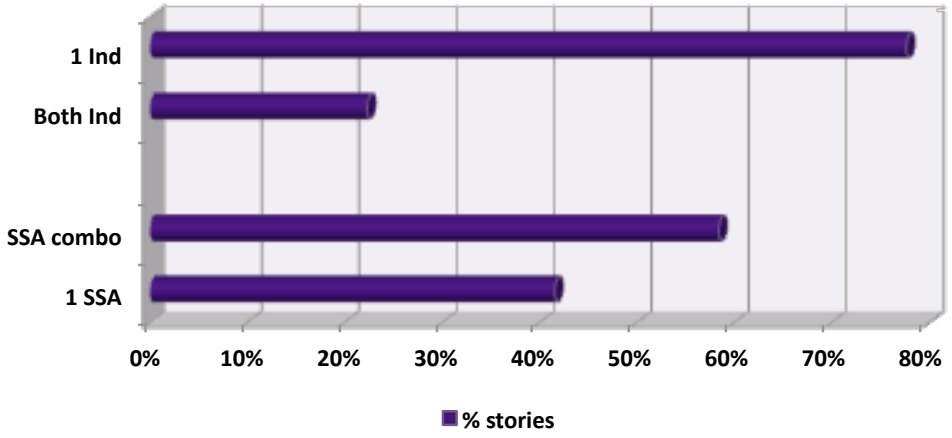
Fig. 8: Distribution of stories across stations (N=374)



of the distribution was that the stories that appeared only on both independent stations accounted for the smallest percentage (under 2%) of stories.

Given the focus of this research, I looked specifically at the distribution of stories on the SSA stations. Specifically, for the stories that were broadcast on the SSA stations, what proportion was presented on both stations? Further, how did that distribution compare with that of the stories that were broadcast on the independent stations? There was a significant difference in the how the stories were distributed within the station groups and the effect of the SSA was clearly visible. To wit: well over half (58%) of the SSA stories were broadcast on ***both*** of the SSA stations (Fig. 9). By contrast, fewer than one-fourth (22%) of the independent stories were presented on both stations. It appears that the managers of the SSA took advantage of that arrangement to present stories across both platforms. Given the purpose of the SSA, that finding was understandable.

Fig 9: Distribution of SSA & Independent stories



Sharing Resources: Given that the purpose of the SSA was to reduce the cost of news production, I looked at how some crucial resources were used among the stations. Specifically, I examined the stories that were broadcast on **both** SSA stations along four dimensions: use of anchors; use of reporters; use of scripts; and the use video/graphics (Table 26). The resource that was shared most commonly was video/graphics (81% of the stories). That was followed by the use of the same script for almost three-fourths (73%) of the stories. The SSA stations shared an anchor for over four out of ten stories and the same reporter for over one-quarter (27%) of the stories.

Table 26: Distribution of Anchor, Reporter, Script, Video on SSA stations				
	Same Anchor %	Same Reporter %	Same Script %	Same Video/ Graphic %
SSA combination stories (n=154)	**41**	**27**	**73**	**81**

Story Type & Local vs. non-Local stories

The types of stories that were broadcast across the station types were statistically significantly different (Table 27). The SSA stations broadcast virtually equal proportions (about 25%) of stories that focused on public issues, other (fires, accidents, etc.) and government/politics. Crime stories accounted for less than one-fifth (17%) of stories and fewer than one-tenth (9%) of the SSA stories dealt with human interest topics. On the other hand, the independent stations focused almost one-third (32%) of their stories on public issues and accounted for much smaller proportions than the SSA stations for the other category (14%) and government/ politics (12%). Crime and human interest stories comprised about one-fifth each of the stories on the independent stations.

Table 27: Story Type* across SSA & Independent stations		
Story type	SSA stations	Independent stations
Public Issues	**25**	**32**
Other**	**25**	**14**
Govt/Politics	**24**	**12**
Crime	**17**	**20**
Human Interest	**9**	**22**
Total	***100***	***100***
p=<.05. *=percentage of stories; **=fires, accidents, etc.		

There was a very substantial and statistically significant difference in the proportion of local stories that were broadcast across the station groups (Table 28). For the the SSA stations, fewer than half (47%) of the stories covered local issues.

In stark contrast, over eight out of ten (82%) of the stories on the independent stations had a local focus.

Table 28: Local stories* across SSA & Independent stations		
Local/non-local stories	**SSA stations**	**Independent stations**
Local stories	**47**	**82**

p=<.05. *=percentage of local stories

Production Factors: Presentation Mode, Block, Duration

In addition to content, ***how*** stories were presented on the newscasts was an important factor to consider. That overall consideration was manifest in the production factors of presentation mode, placement of the story within the newscast (as defined by block) and duration of the story.

Presentation Mode: There was a statistically significant difference between the station groups regarding presentation modes (Table 29). Essentially, the station groups used the voice-over-by-anchor and the package modes to convey most of their stories (Table 29). However, they used those modes in very different ways. The independent stations used the package mode most prominently, for almost half (45%) of their stories. On the other hand, the SSA stations relied most heavily on the voice-over-by-anchor mode (49%). That is an important finding when we consider that the independent stations also broadcast almost twice as many local stories (see Table 28).

Table 29: Presentation mode across SSA & Independent stations*		
	SSA stations	**Independent stations**
Voice-over by anchor	**49**	**33**
Package	**28**	**46**
Other**	**23**	**21**
Total	***100***	***100***

p=<.05. *=percentage of stories; **=anchor-read, live location, reporter in newsroom.

Placement: The differences in the length of the broadcasts between the station types was also evident in the placement of the stories within the broadcasts. I defined placement as block, the periods of the newscast separated by commercial breaks. Therefore, block 1 represents the period from the opening of the show to the first commercial break. It is typically the longest block in which the most important stories of the day (as defined by placement) are presented. Block 2 represents the second such period (between the first and second commercial breaks). The blocks after the third commercial break were collapsed in order to aid the analysis.

There was a statistically significant difference in the placement of the stories on the broadcasts across the station types (Table 30). Remember that both station groups had a 60-minute broadcast. As a result, both groups broadcast a substantial proportion of their stories in the period ***after*** the second block. In fact, the SSA stations used the ***later blocks*** (43% of stories) for about the same proportion of stories that the independent stations broadcast in the ***first block*** (42%). Perhaps that finding can be explained by the fact that one-quarter of the SSA stories were in the ***other*** category that may have commanded a later time slot in the newscast due to the topic. There was a difference in the use of Block 2 between the station types (31% and 24% for the SSA and independent stations, respectively).

Table 30: Placement of stories across SSA & Independent stations*

	SSA stations	Independent stations
Block 1	**26**	**42**
Block 2	**31**	**24**
Block 3+	**43**	**34**
Total	***100***	***100***

p=<.05. *=percentage of stories

Duration: The difference in the amount of time that each of the station types had for their newscasts was evident in the duration of the stories across the presentation modes (Table 31). For all of the presentation modes, the independent stations presented longer stories than the SSA stations. That was particularly true for the package stories in which the independent stories spent, on average, 145 seconds compared to only 87 average seconds for the SSA stations. The stories that were presented using the voice-over-by-anchor mode were relatively close in

average duration (33 and 37 seconds for the SSA and independent station groups, respectively).

Table 31: Presentation mode & Duration* across SSA & Independent stations

	SSA stations	Independent stations
Voice-over by anchor	**33**	**37**
Package	**87**	**145**
Other**	**26**	**46**
All modes	***47***	***84***

p=<.05. *=mean number of seconds **=anchor-read, live location, reporter in newsroom.

Summary

The shared services agreement between WFFF and WVNY had an effect on the presentation of local news in the Burlington market as measured by the factors in this research. Almost six out of ten stories that were broadcast by the SSA group were presented on both stations. That is compared to under one-quarter of stories for the independent stations. Further, when the SSA stations broadcast the stories on the both stations they did so using the same script almost three-fourths of the time and the same video for over eight out of ten stories. By definition, these stories were exactly the same on both stations. Logically, then, the diversity of news in the Burlington market was reduced. Again, as in the other markets that I examined in this research, the SSA had its intended effect in achieving some economies of scale as resources were shared across the newscasts.

Peoria

The Peoria Television Market

The Peoria, Illinois television market is ranked 116th in the U.S. with 251,880 television households (Nielsen, 2011). In the Peoria market five stations deliver a regular daily newscast: WEEK, WHOI, WAOE, WMBD and WYZZ. The Peoria television market is characterized by the fact that there are no independent stations in the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License). Three stations, WEEK, WHOI and WAOE operate under a shared services agreement (SSA). The remaining two stations, WMBD and WYZZ, function under a local marketing agreement (LMA).

WEEK-TV is the NBC affiliate and it is owned by Granite Broadcasting Corporation. It operates both WHOI through a shared services agreement (implemented in 2009) and WAOE through a joint sales agreement (implemented in 2006). The station identifies a news staff of seventeen people (WEEK-TV, 2011).

WHOI-TV is the ABC affiliate in the Peoria market and it is owned by Barrington Broadcasting Group, LLC. When the SSA was implemented, the station closed its studios and moved to the facilities of WEEK (Mondotimes, 2011). WHOI's nightly newscasts at 5pm and 6pm were replaced by one newscast at 5:30. WHOI does not have its own website and it shares a website with WEEK at www.centralillinoisnewscenter.com.

WAOE is the MyNetworkTV affiliate in Peoria, owned by Four Seasons Broadcasting. It is operated by Granite Broadcasting under a joint sales agreement (JSA). However,the characteristics of the JSA exactly match the features of a shared services agreement (SSA) because WEEK produces a local primetime newscast for WAOE at 9pm which premiered in 2006. The newscast is described by the station as bringing the resources of the WEEK news team to a more convenient viewing time. It specifies that the newscast will be the product of another station.

> Research has shown that many people in the hard-working Midwest, such as those working third shift as well as those who prefer to be in bed earlier than 10pm, prefer the convenience of local news at 9pm. News 25 at 9pm on My59 will allow viewers access to the dominant and most-watched news operation at a more convenient time based upon their schedule. This newscast will include material gathered by the entire WEEK News 25 team

> of anchors, reporters and photo-journalists giving Central Illinois the full benefit of WEEK's award-winning news operation (My59, 2011).

The WEEK, WHOI, WAOE shared services agreement: The SSA that was implemented in March 2009 between Granite Broadcasting Corporation and Barrington Broadcasting Group involved two television markets, Syracuse and Peoria. Essentially, the station groups took over each other's stations in the two markets. In Syracuse (Market #81), Granite-owned WTVH-5-CBS would be operated from the studios of Barrington's WSTM-3-NBC. In Peoria, Barrington's WHOI-19-ABC would be operated from the studios of Granite's WEEK-25.

Under the terms of the agreements, the operating station provides advertising, sales, promotion, administrative services, and selected programming, including news, to the other station. "This arrangement between Granite and Barrington will create a better and more efficient operation, which will enhance these outstanding local television stations," (Granitetv, 2009).

In announcing the implementation of the shared services agreement, the WEEK press release was very clear about the effect on newscasts in the Peoria market.

> The two stations will produce newscasts with the combined staffs of both broadcast teams. In fact, the combination of the two companies will marry programming for many stations including the local NBC and ABC affiliates as well as My 59-WAOE, the CW and Weather Plus. Fully five television platforms will be housed under one roof and one combined operation (WEEK, 2009).

It goes on to speak about efficiencies:

> Under the terms of the JSA and SSA, Granite and Barrington expect to realize a number of expense efficiencies through the combining of resources and the reduction of some staff positions. Affected employees will receive a generous severance package and extensive job placement assistance will be offered at company expense (Granitetv, 2009).

The desired efficiencies of the arrangements between Granite and Barrington had an immediate effect on the staffs of the stations. In Syracuse, forty staffers were fired at Granite's WTVH, the city's oldest television broadcaster. Employees were told at a 10 am meeting to pack their belongings and leave. Services were shifted to Barrington's WSTM in the market

(Breidenbach, 2009). In Peoria, as many as thirty employees of WHOI were laid off as the agreement went into effect and sixteen others were transferred to WEEK (Tartar, 2009).

WMBD is the CBS affiliate in Peoria and it is owned by the Nextar Broadcasting Group. Since 2002, it also operates the Fox affiliate WYZZ-TV, owned by the Sinclair Broadcast Group, through a local marketing agreement (LMA). However, the two stations share studios in the same building.

WYZZ is the Fox network affiliate in Peoria. WYZZ began broadcasting in 1982. Its nightly 9pm newscast is produced by WMBD and, although there was some indication that the LMA between WMBD and WYZZ would end in 2010, that has not happened (Peoria Chronicle, 2010).

The constructed week for the Peoria market that comprised the sample of broadcasts began on Tuesday, May 10 and ended on Monday, June 13, 2011. The newscasts that were captured represented the most appropriate combination of broadcasts to make comparison possible. All of the newscasts were 30 minutes in length. The sample included: the broadcasts of WEEK and WMBD at 6pm; the broadcasts of WAOE and WYZZ at 9pm; and the 5:30pm broadcast of WHOI. During the constructed week, 272 stories were presented across the newscasts with the following distribution: WAOE=67; WYZZ=57; WMBD=53; WEEK=50; and WHOI=45.

Ratings: According to Nielsen, the newscasts experienced a wide range of ratings in May 2011.[12] WEEK was the ratings leader by a very large margin with a 9.1 rating and a 24 share. The other SSA stations had much smaller audiences as WHOI registered a 3.8 rating and a 12 share and WAOE achieved only a 0.5 rating and a 1 share. In like manner, the size of the audiences for the LMA stations was very different in which WMBD showed a rating of 4.3 and a 14 share and WYZZ had a 2.0 rating and a 4 share. (Nielsen, Licensed Data, 2011).

[12] Rating is the percentage of all television households tuned to a specific station. Share is the percentage of households tuned to a specific station at a specific time.

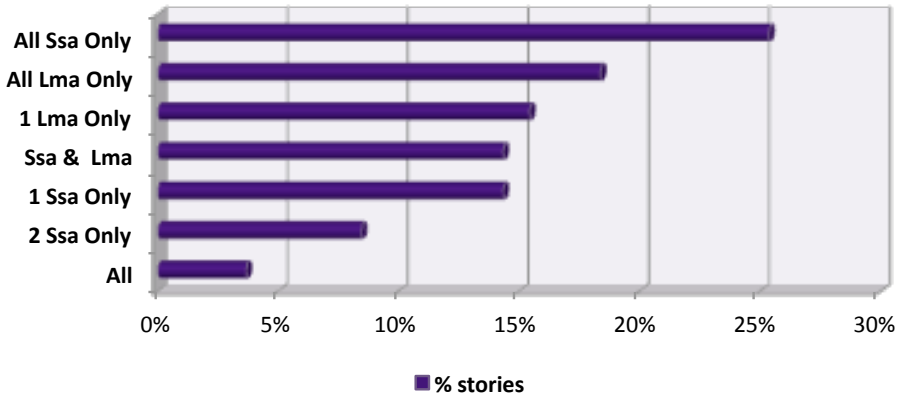
Distribution of Individual Stories

The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=272) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast **only** on the SSA stations **individually** appeared either only on WEEK, WHOI **or** WAOE and nowhere else. Likewise, the stories that were reported **only** on the **combination** of the SSA stations were broadcast on, at least, two of those stations. The same logic was applied to the stories that appeared on the LMA stations, WMBD and WYZZ. Each of the appearance categories was mutually exclusive. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations within each station group as defined by the SSA and the LMA stations. The graphs that follow indicate the findings for each of the specific distributions across the stations.

Distribution of all stories

The distribution of the stories across the stations was affected by the agreements among the owners within the two groups of stations (Fig. 10). Stories that were broadcast ***only*** on ***all three*** of the SSA stations accounted for the largest

Fig. 10: Distribution of stories across stations (N=272)

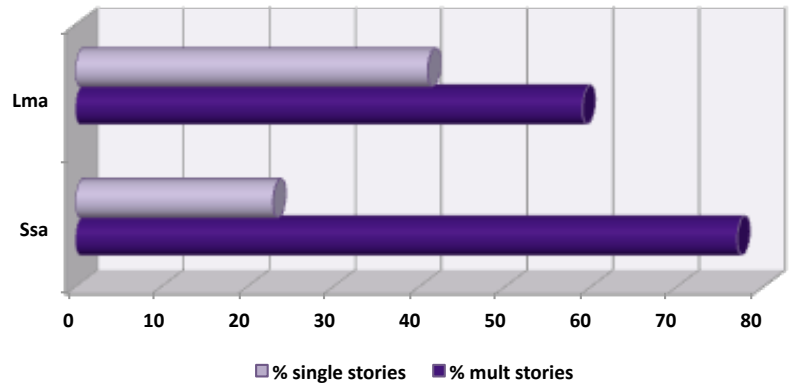


proportion (25%). Another eight percent of the stories were broadcast ***only*** on ***two*** of the SSA stations. That means that one-third of the stories that were broadcast in Peoria were only part of the SSA broadcasts. Just under one-fifth (18%) of stories were broadcast ***only*** on ***both*** LMA stations (18%). Stories that appeared only on ***one LMA*** station and only on ***one SSA*** station accounted for almost equal

proportions (15% and 14%, respectively). Only about fourteen percent of stories were broadcast on one SSA and LMA station. Remarkably, the smallest proportion of stories (just under 4%) were those that appeared on all five of the stations. This distribution reveals that the SSA and LMA station groups essentially selected a different set of stories to broadcast. The question is whether those stories were different within the newscasts of the SSA and LMA stations.

Given the focus of this research and the findings above, I took a closer look at the stories that were broadcast on the SSA and LMA stations. Specifically, for the stories that were broadcast on the SSA (n=167) and LMA (n=102) stations, what proportion was presented on both stations for the LMA and, at least, two of the three SSA stations? Within both station groups the effects of the SSA and LMA were evident (Fig. 11). To wit: almost eight out ten (78%) of the SSA stories were broadcast on, at least two ***two*** of the SSA stations (Fig. 10). For the LMA stations, almost six out of ten (59%) were broadcast on ***both*** LMA stations. The managers of the SSA (and to a lesser extent the LMA managers) carried out what they said was the purpose of the arrangement---to present stories across several platforms.

Fig. 11: Distribution of stories on SSA & LMA stations



Sharing Resources: Given that the purpose of the SSA and the LMA was to reduce the cost of news production, I considered how some crucial resources were used among the stations. Specifically, I examined the stories that were broadcast on both LMA stations and on, at least, two SSA stations along four dimensions: use of anchors; use of reporters; use of scripts; and the use video/graphics (Table 32).

Table 32: Distribution of Anchor, Reporter, Script, Video on SSA & LMA stations				
	Same Anchor %	Same Reporter %	Same Script %	Same Video/ Graphic %
SSA combination stories (n=128)	0	29	95	91
LMA combination stories (n=60)	44	31	92	89

For both of the station groups, crucial resources were shared for the stories that appeared on multiple broadcasts. Most importantly, the same script and the same video were used around ninety percent of the time to convey the content of news stories. The economies of scale that both the SSA and LMA were designed to achieve were most clearly evident in these fundamental characteristics of the news stories. These two resources comprised the essential attributes of the story and they did not vary across broadcasts within the station groups. As a result, no matter which broadcast within the station group the audience saw, the story was the same.

Story Type & Local vs. non-Local stories

The types of stories that were broadcast across the station types were statistically significantly different (Table 33). For both station groups, public issues (43% and 31% for the SSA and LMA stations, respectively) accounted for the

Table 33: Story Type* across SSA & LMA stations		
Story type	SSA stations	LMA stations
Public Issues	43	31
Human Interest	21	27
Other**	15	6
Crime	11	21
Govt/Politics	10	15
Total	*100*	*100*

p=<.05. *=percentage of stories; **=fires, accidents, etc.

plurality of stories. Crime was more prominent on the LMA stations that the SSA stations (21% to 11%, respectively). The coverage of government/politics was not a priority for either group of stations, accounting for ten percent of stories on the SSA broadcasts and fifteen percent of stories on the LMA stations.

Both station groups devoted a large proportion of their stories to local topics (Table 34).

Table 34: Local stories* across SSA & LMA stations

Local/non-local stories	SSA stations	LMA stations
Local stories	**81**	**83**

***=percentage of local stories**

Production Factors: Presentation Mode, Block, Duration

In addition to content, ***how*** stories were presented on the newscasts was an important factor to consider. That overall consideration was manifest in the production factors of presentation mode, placement of the story within the newscast (as defined by block) and duration of the story.

Presentation Mode: There was virtually no difference between the station groups regarding presentation modes (Table 35). Essentially, the station groups used the voice-over-by-anchor for a substantial majority of their stories (58% and 55% for the SSA and LMA stations, respectively). The package mode (the most expensive of the methods to convey the story) was used for just under one-quarter (23%) of the stories for both station groups.

Table 35: Presentation mode across SSA & LMA stations*

	SSA stations	LMA stations
Voice-over by anchor	**58**	**55**
Package	**23**	**23**
Other**	**19**	**22**
Total	***100***	***100***

***=percentage of stories; **=anchor-read, live location, reporter in newsroom.**

Placement: The differences in the length of the broadcasts between the station types was also evident in the placement of the stories within the broadcasts. I defined placement as block, the periods of the newscast separated by commercial breaks. Therefore, block 1 represents the period from the opening of the show to the first commercial break. It is typically the longest block in which the most important stories of the day (as defined by placement) are presented. Block 2 represents the second such period (between the first and second commercial breaks). The blocks after the third commercial break were collapsed in order to aid the analysis.

There was a statistically significant difference in the placement of the stories on the broadcasts across the station types (Table 36). Remember that all of the broadcasts were 30 minutes in length. As we might expect, then, the first block contained the highest proportion of stories. The LMA stations used the first block more extensively (78% of stories) than the SSA stations (62% of stories). As a result, the SSA stations placed more stories in the second block and the blocks after that (18% and 20%, respectively) than the LMA stations.

Table 36: Placement of stories across SSA & LMA stations*

	SSA stations	LMA stations
Block 1	**62**	**78**
Block 2	**18**	**8**
Block 3+	**20**	**14**
Total	***100***	***100***

p=<.05. *=percentage of stories

Duration: There was not a significant difference between the two station groups regarding the duration of stories (Table 37). For both the SSA and LMA stations, the package mode accounted for the longest stories (118 and 111 average seconds for the SSA and LMA stations, respectively). Given the nature of that presentation approach, we could expect that finding. The only real difference in the duration of stories occurred for the ***other*** mode (40 and 28 average seconds for the SSA and LMA stations, respectively). Across all modes, the SSA stories were longer (64 average seconds) than those presented on the LMA stations (58 average seconds). In short, both station groups treated the stories similarly with respect to time.

Table 37: Presentation mode & Duration* across SSA & LMA stations		
	SSA stations	LMA stations
Voice-over by anchor	**49**	**44**
Package	**118**	**111**
Other**	**40**	**28**
All modes	*64*	*58*
*=mean number of seconds **=anchor-read, live location, reporter in newsroom.		

Summary

The Peoria market was dominated by the shared services and local marketing agreements that were the essential features of the DMA® (DMA® is a registered service mark of The Nielsen Company. Used under License). Both agreements were implemented to achieve economies of scale and to use multiple "platforms" (stations) to deliver news content. As measured by the distribution of stories, the agreements seem to have accomplished that goal. The result, however, is that the Peoria audience saw only two versions of the "reality" of the market, rather than, perhaps, as many as five views (given that five stations were involved in the agreements). In fact, in large measure, both station groups broadcast their own set of stories (see Fig. 9) and there was not much overlap. But, as I said, within the station groups, the stories were virtually the same as measured by the use of the same script and the same video/graphics.

Columbus

The Columbus Television Market

The Columbus, Georgia television market is ranked 127th in the U.S. with 219,450 television households (Nielsen, 2011). In the Columbus market, four stations deliver a regular daily newscast: WTVM, WXTX, WRBL and WLTZ.

WTVM, the ABC affiliate in the market, began operations in October 1953 as the the first television station in Columbus. The station has had different owners throughout the years, and today it is owned by Raycom Media. It operates its sister station in the market, WXTX, through a shared services agreement (SSA). WTVM specifies a news staff of twenty-one employees including anchors, reporters and management (WTVM, 2011). Additionally, there are four employees in the news management department (WTVM, 2011). It airs 3.5 hours of local news on weekdays, and 1 hour on Saturdays and Sundays for a total of 19.5 hours of local news weekly (Titantvlistings, 2011).

WXTX, owned by Southeastern Media since 2003, went on the air on November 1984 as an independent station. It became affiliated with the Fox network in 1987 and later it acquired a secondary affiliation with MyNetworkTV (mynetworktv, 2011). WXTX is operated through a shared services agreement by WTVM. It broadcasts thirty minutes of local news at 10pm every day, including weekends for a total of 3.5 hours a week (Titan TV Listings). The station's web site displays a list of its six anchors (WXTX, 2011), all of whom are listed as part of the news team at WTVM.

WRBL is the CBS affiliate in Columbus and it first went on the air on November 1953. The station is owned by Medial General. WRBL airs 2.5 hours of local news Monday through Friday, and 30 min of local news on Sundays, for a total of 13 hours a week of local news (TVB, 2011). The station has a staff of 15 employees including anchors, reporters and managers (WRBL, 2011).

WLTZ began broadcasting in October, 1970. It is the NBC affiliate owned by Sagamore Hill Broadcasting. Presently WLTZ airs thirty minutes of local news daily on weekdays and there are no newscasts on weekends (Titantvlistings, 2011). The station lists a staff of eleven people in the newsroom including anchors, reporters, and news tips contact person (WLTZ, 2011).

The constructed week for the Columbus market that comprised the sample of broadcasts began on Monday, May 9 and ended on Friday, June 10, 2011. The newscasts that were captured represented the most appropriate combination of broadcasts to make comparison possible. The sample included: the 6pm broadcasts of WTVM, WRBL and WRTZ , all of which were thirty minutes and the 10pm broadcast of WXTX which lasted thirty-five minutes. During the constructed week, 223 stories were presented across the newscasts with the following distribution: WXTX=68; WLTZ=58; WRBL=52; and WTVM=45.

Ratings: According to Nielsen, the newscasts experienced a wide range of ratings in May 2011.[13] WTVM, the manager of the SSA, was the ratings leader by a very large margin with a 12.5 rating and a 28 share. The other SSA station, WXTX, had much smaller audience with a 3.0 rating and a 6 share. The independent stations also had very different audiences. WRBL achieved a rating of 4.5 and a 10 share, while WLTZ had the smallest audience of all of the stations with 1.6 rating and a 4 share (Nielsen, Licensed Data, 2011).

Distribution of Individual Stories

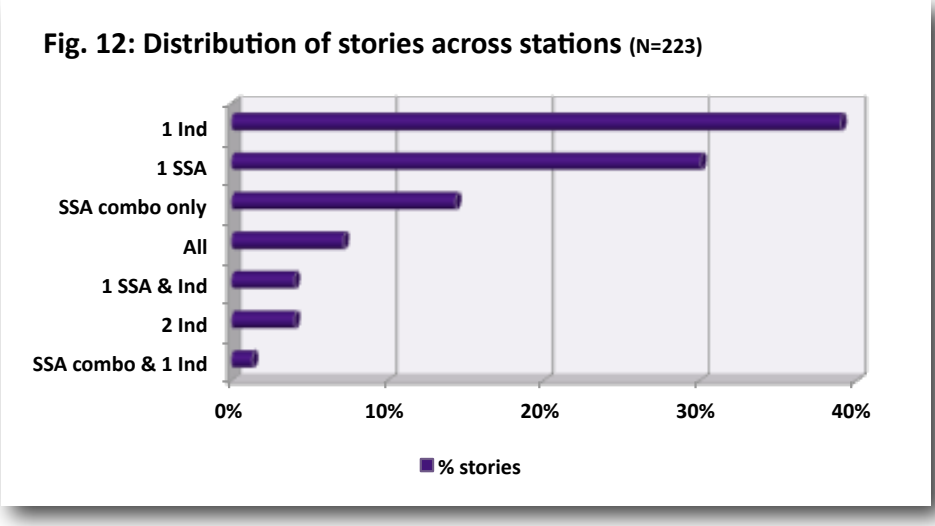
The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=223) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast **only** on the SSA stations **individually** appeared either only on WTVM **or** WXTX and nowhere else. Likewise, the stories that were presented on the combination of the SSA stations appeared on both SSA stations and nowhere else. The same logic was applied to the stories that appeared on the independent stations, WRBL and WLTZ. Each of the appearance categories was mutually exclusive. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations within each station group as defined by the SSA and the independent stations. The graphs that follow indicate the findings for each of the specific distributions across the stations.

Distribution of all stories

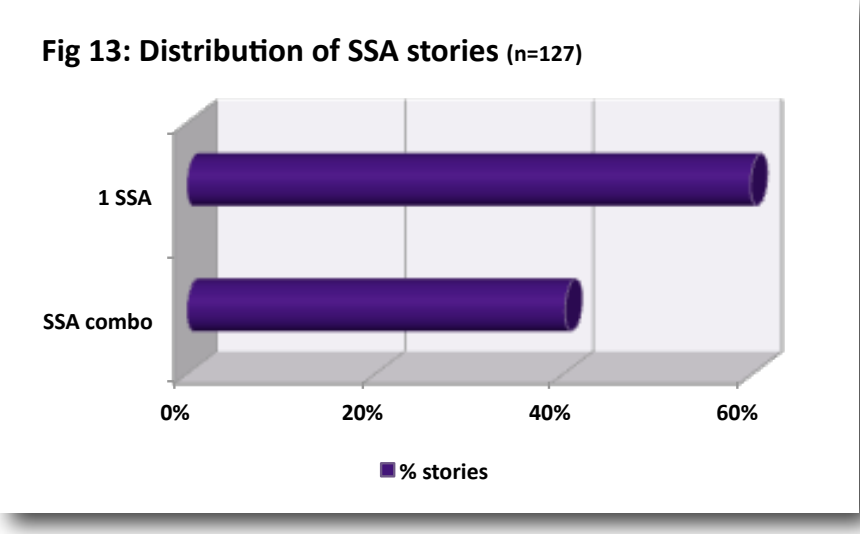
The distribution of the stories across the stations showed that they appeared most often on only one station (Fig. 12). Almost four out of ten (39%) stories appeared one or the other of the independent stations. Another thirty percent

[13] Rating is the percentage of all television households tuned to a specific station. Share is the percentage of households tuned to a specific station at a specific time.

appeared on one or the other of the SSA stations. The SSA combination accounted for fourteen percent of stories. The proportion of stories that appeared on all stations accounted for much lower than one in ten (7%). Stories that appeared on combinations of SSA and independent stations each comprised under four percent.



I took a closer look at the stories that were broadcast on the SSA, given the focus of this research. Specifically, for the stories that were broadcast on the SSA (n=127) stations, what proportion was presented on both WTVM and WXTX? Although the SSA stations broadcast the majority of their stories on only one of the stations, four out of ten stories were presented on both stations (Fig. 13).



Sharing Resources: Given that the purpose of the SSA was to reduce the cost of news production, I looked at how some crucial resources were used among the stations. Specifically, I examined the stories that were broadcast on **both** SSA stations along four dimensions: use of anchors; use of reporters; use of scripts; and the use video/graphics (Table 38). The effect of the SSA was most evident here as both the script and the video/graphics of the stories were shared overwhelmingly across both stations (90% and 86%, respectively). Further, the stations shared the same reporter for over six out of ten (61%) of stories.

Table 38: Distribution of Anchor, Reporter, Script, Video on SSA stations

	Same Anchor %	Same Reporter %	Same Script %	Same Video/ Graphic %
SSA combination stories (n=51)	**28**	**61**	**90**	**86**

Story Type & Local vs. non-Local stories

The proportions of the types of stories that were broadcast across the stations were remarkably similar (Table 39). Public issues and crime accounted for

Table 39: Story Type* across SSA & Independent stations

Story type	SSA stations	Independent stations
Public Issues	**28**	**26**
Crime	**26**	**28**
Human Interest	**23**	**23**
Other**	**13**	**10**
Govt/Politics	**10**	**13**
Total	***100***	***100***

***=percentage of stories; **=fires, accidents, etc.**

the same combined percentage (54%), although with slightly different individual proportions, for both groups of stations. Human interest stories comprised the exact same percentage (23%) for both groups. Independent stations covered more

government/politics (13%), while the SSA stations covered more stories in the ***other*** category (13%).

The was a very large and statistically significant difference in the proportion of stories that the stations devoted to local issues (Table 40). In fact, local topics appeared almost twice as often (61%) on the independent stations as on the SSA stations (32%).

Table 40: Local stories* across SSA & Independent stations

Local/non-local stories	SSA stations	Independent stations
Local stories	**32**	**61**

***=percentage of local stories**

Production Factors: Presentation Mode, Block, Duration

In addition to content, ***how*** stories were presented on the newscasts was an important factor to consider. That overall consideration was manifest in the production factors of presentation mode, placement of the story within the newscast (as defined by block) and duration of the story.

Presentation Mode: There was relatively little difference between the station groups regarding presentation modes (Table 41). Both used the voice-over-by-anchor most extensively (73% and 65% for the SSA and independent stations, respectively). Importantly, each used the package mode for just under one-fifth of stories.

Table 41: Presentation mode across SSA & Independent stations*

	SSA stations	Independent stations
Voice-over by anchor	**73**	**65**
Package	**19**	**18**
Other**	**8**	**17**
Total	***100***	***100***

***=percentage of stories; **=anchor-read, live location, reporter in newsroom.**

There was a statistically significant difference in the placement of the stories on the broadcasts across the station types (Table 42). Remember that three of the four broadcasts were 30 minutes in length and the fourth had a duration of 35 minutes. As we might expect, then, the first block contained the highest proportion of stories. That was the case much more for the independent stations where over three-fourths (76%) of the stories were presented in the first block. The SSA stations, on the other hand, broadcast just over half (57%) of their stories in the first block. The proportion of stories in block 2 was relatively similar. However, the SSA stations did present a larger proportion of stories in blocks 3+ (20% and 5% for the SSA and independent stations, respectively). That difference may be due to the fact that one of the SSA stations' broadcasts was thirty-five minutes long.

Table 42: Placement of stories across SSA & Independent stations*

	SSA stations	Independent stations
Block 1	**57**	**76**
Block 2	**23**	**19**
Block 3+	**20**	**5**
Total	***100***	***100***

p=<.05. *=percentage of stories

Duration: The duration of the stories across the presentation modes was relatively similar across both station groups (Table 43). Each group spent about the same amount of time, on average, for the voice-over-by-anchor mode (47 and 45 average seconds for the SSA and independent stations, respectively). The

Table 43: Presentation mode & Duration* across SSA & Independent stations

	SSA stations	Independent stations
Voice-over by anchor	**47**	**45**
Package	**122**	**131**
Other**	**44**	**28**
All modes	***61***	***59***

***=mean number of seconds **=anchor-read, live location, reporter in newsroom.**

independent stations spent more time, on average, for the package presentation mode (131 seconds).

Summary

The distribution of stories across the stations in the Columbus market seemed to indicate that there was a difference in the stories that were covered by the SSA and independent station groups. That is, almost seventy percent of the stories appeared either only on one or the other SSA station or only on one or the other independent station. Fewer than ten percent of the stories appeared on all four stations. Clearly, the groups of stations made different news selection choices. However, within the SSA stations, the effect of the agreement was evident. Forty percent of the stories presented by the SSA group were broadcast on both stations. When that occurred, the audience saw stories with the same script and the same video/graphics about ninety percent of the time.

Wichita Falls

The Wichita Falls Television Market

The Wichita Falls, Texas television market is ranked 146th in the U.S. with 157,030 television households (Nielsen, 2011). In the Wichita Falls market, four stations deliver a regular daily newscast: KFDX, KJTL, KAUZ, and KSWO, all of which are parts of two shared services agreements. KDFX and KJTL operate under one SSA, and KSWO and KAUZ function under a second SSA in the market.

KFDX is a NBC affiliated television station and is owned by Nexstar Broadcasting Group, Inc. The station began broadcasting in April 1953. KFDX employs seventeen anchors and reporters (texomashomepage, 2011). The station operates Mission Broadcasting-owned KJTL through a shared services agreement (Nextar, 2011).

KJTL is the FOX affiliate and it is owned by Mission Broadcasting. Under the shared services agreement, its 9pm week night newscast is produced by KFDX.

The arrangement between KFDX and KJTL is augmented by a joint sales agreement with the MyNetworkTV affiliate, KJBO. However, KJBO does not produce a regular newscast in the market.

KFDX, KJTL and KJBO all share the exact same webpage at texomashomepage.com. The page lists the exact same news team from KFDX for both stations with same mailing address, phone numbers and email address. The webpage states that it was launched on April 10, 2007, presumably when the SSA and JSA went into effect.

KAUZ-TV, is a CBS affiliate television station owned by Hoak Media Corporation. It is managed through joint services agreements and shared service agreements by **KSWO** (owned by Drewry Communications), the ABC affiliate in the market that were implemented in July, 2009 (Walker, 2009). The general manger of KSWO indicated that the new company (resulting from the agreements) would manage KAUZ as a separate entity from KSWO and that the stations would maintain separate news operations (Walker, 2009). The stations do not share the same website.

The constructed week for the Wichita Falls market that comprised the sample of broadcasts began on Wednesday, June 15 and ended on Tuesday, July 19, 2011. The newscasts that were captured represented the most appropriate combination of broadcasts to make comparison possible. All of the newscasts were thirty-five minutes in duration. The sample included: the 9pm broadcast of KJTL and the 10pm broadcasts of KAUZ, KFDX and KSWO. During the constructed week, 243 stories were presented across the newscasts with the following distribution: KAUZ=70; KSWO=63; KFDX=58; and KJTL=52.

Ratings: According to Nielsen, the newscasts experienced a wide range of ratings in May 2011.[14] Each of the SSAs had a relatively strong and weak station, as measured by ratings. For SSA1 (KFDX and KJTL), KFDX was the stronger station by far with a 7.9 rating and a 17 share compared to KJTL's 1.9 rating and 3 share. Likewise, although not as wide a margin, for the second SSA, KSWO showed substantially higher performance registering a 5.7 rating and a 14 share in contrast to its sister station KAUZ's 4.2 rating and 9 share. (Nielsen, Licensed Data, 2011).

Distribution of Individual Stories

The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=243) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast **only** on the SSA1 stations **individually** appeared either only on KFDX **or** KJTL and nowhere else. Likewise, the stories that were presented on the combination of the SSA1 stations appeared on both SSA1 stations and nowhere else. The same logic was applied to the stories that appeared on the SSA2 stations, KSWO and KAUZ. Each of the appearance categories was mutually exclusive. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations within each station group as defined by the SSA1 and the SSA2 stations. The graphs that follow indicate the findings for each of the specific distributions across the stations.

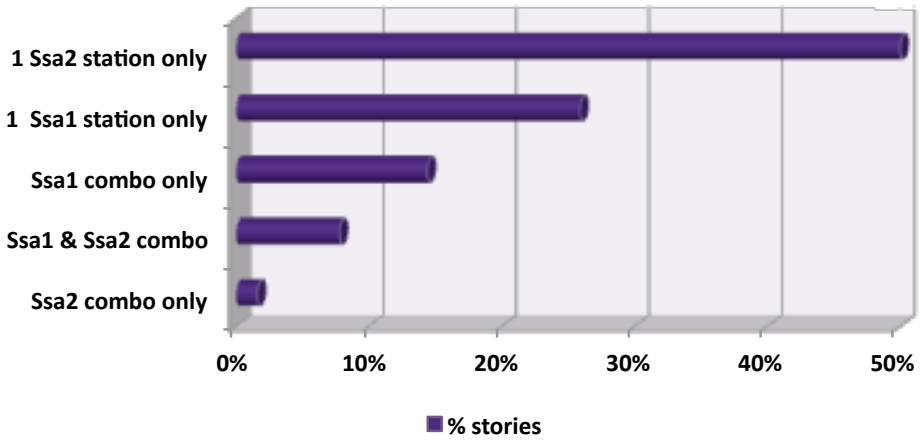
Distribution of all stories

The distribution of the stories across the stations showed that they appeared most often on only one station (Fig. 14). About one-half of the stories appeared only on one or the other of the SSA2 stations. That would suggest that the

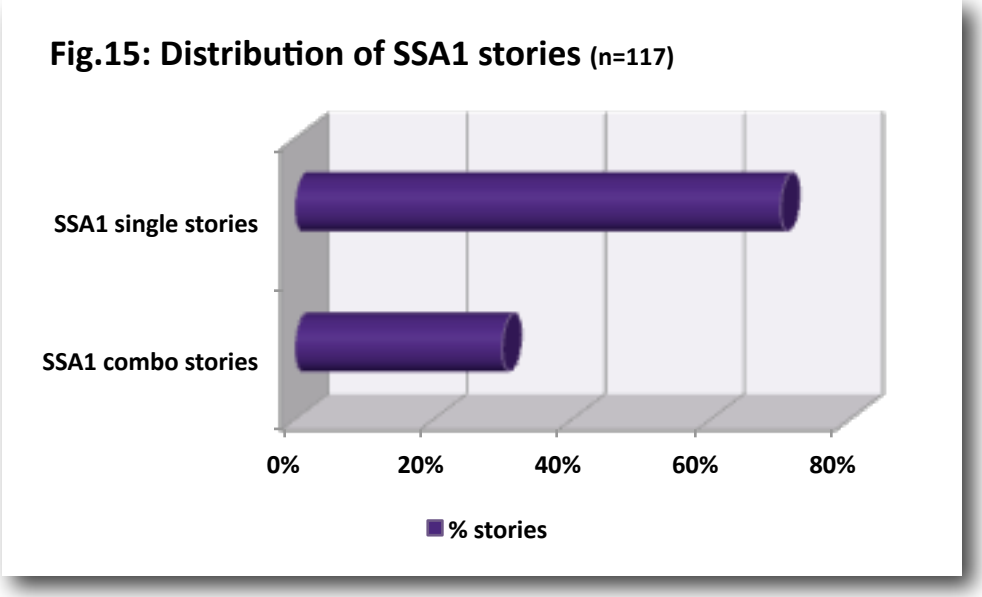
[14] Rating is the percentage of all television households tuned to a specific station. Share is the percentage of households tuned to a specific station at a specific time.

managers of the SSA2 agreement did maintain separate news operations for the stations, as they claimed. That separation was also evident in the finding that only about two percent of the stories were broadcast on ***both*** of the SSA2 stations. About one-fourth of the stories (26%) were broadcast on one or the other of the SSA1 stations. However, the closer relationship of the SSA1 stations was revealed in the higher proportion of stories that were broadcast on both stations (14%). Interestingly, there were ***no*** stories that were presented on ***all*** of the stations---the only market among the sample in which that phenomenon occurred.

Fig 14: Distribution of stories across stations (N=243)



I took a closer look at the stories that were broadcast on the SSA, given the focus of this research (Fig. 15). Specifically, for the stories that were broadcast on the SSA1 (n=117) stations, what proportion was presented on both of the SSA1, KFDX and KJTL? I did not look at the SSA2 combination because that only accounted for less than two percent of the stories that was an insufficient number of to draw any conclusions. We can see that a significant majority (70%) of the stories that were broadcast on the SSA1 stations were presented on only one of the stations.



Sharing Resources: Given that the purpose of the SSA was to reduce the cost of news production, I looked at how some crucial resources were used among the stations. Specifically, I examined the stories that were broadcast on **both** SSA1 stations along four dimensions: use of anchors; use of reporters; use of scripts; and the use video/graphics (Table 44). Even though the number of stories was relatively small (n=35), the effect of the SSA between KFDX and KJTL was evident. Just under half of the stories (47%) were presented using the same reporter while the same script was used for four-fifths of the stories and the same video/graphics were used for about nine out of ten stories.

Table 44: Distribution of Anchor, Reporter, Script, Video on SSA1 stations

	Same Anchor %	Same Reporter %	Same Script %	Same Video/ Graphic %
SSA1 combination stories (n=35)	**44**	**47**	**80**	**89**

Story Type & Local vs. non-Local stories

The was a statistically significant difference in the distribution of the types of stories that were broadcast across the stations (Table 45). Both SSA groups presented about the same proportion of public issues stories (31% and 30% for the

SSA1 and SSA2 stations, respectively). There were large differences in their treatment of crime (22% to 13% for the SSA1 and SSA2 groups, respectively). However, the largest difference between the two station groups was reflected in their coverage of government/politics. The SSA2 stations focused on that category almost three times as much as the SSA1 group (20% to 7%, respectively). In fact, government/politics stories was the second most prominent topic for the SSA2 stations.

Table 45: Story Type* across SSA & SSA2 stations

Story type	SSA1 stations	SSA2 stations
Public Issues	**31**	**30**
Human Interest	**26**	**19**
Crime	**22**	**13**
Other**	**14**	**18**
Govt/Politics	**7**	**20**
Total	***100***	***100***

p=<.05. *=percentage of stories; **=fires, accidents, etc.

The was a difference in the proportion of stories that the stations devoted to local issues (Table 46). Only one station group, SSA1, devoted a majority (56%) of stories to local issues. The SSA2 stations used fewer than half (44%) of their stories to address local topics.

Table 46: Local stories* across SSA1 & SSA2 stations

Local/non-local stories	SSA1 stations	SSA2 stations
Local stories	**56**	**44**

***=percentage of local stories**

Production Factors: Presentation Mode, Block, Duration

In addition to content, ***how*** stories were presented on the newscasts was an important factor to consider. That overall consideration was manifest in the production factors of presentation mode, placement of the story within the newscast (as defined by block) and duration of the story.

Presentation Mode: There was a statistically significant difference between the station groups regarding presentation modes (Table 47). The SSA2 group used the voice-over-by-anchor mode for over three-fourths

Table 47: Presentation mode across SSA1 & SSA2 stations*

	SSA1 stations	SSA2 stations
Voice-over by anchor	**55**	**77**
Package	**32**	**14**
Other**	**13**	**9**
Total	***100***	***100***

p=<.05. *=percentage of stories; **=anchor-read, live location, reporter in newsroom.

(77%) of stories, compared to just over half (55%) for the SSA1 stations. The differences in presentation modes was also visible in the use of the package mode, the most expensive of the approaches (32 % and 14% for the SSA1 and SSA2 stations, respectively). To add more insight, fewer than half of the SSA1 package stories appeared on the the combination of both stations.

There was a statistically significant difference in the placement of the stories on the broadcasts across the station types (Table 48). As we might expect, the first block contained the highest proportion of stories. That was the case more often for the SSA1 stations where almost two-thirds (63%) of the stories were presented in the first block. The SSA2 stations, on the other hand, broadcast just over half (55%) of their stories in the first block. The proportion of stories in block 2 was very different and, given the findings in the other markets, unusually so. The SSA2 stations broadcast a very small proportion of their ***stories*** in the second block. I emphasize ***stories*** here because a closer examination showed that the SSA1 stations most often placed the weather *segment* in the second block. Remember, that the weather and sports *segments* were not included as separate stories in this

research (see definition of unit of observation on page 14 of this report). Therefore, for those stations, most of the time in block 2 was occupied by the weather segment and only a small proportion of stories was included. That explains the finding that the SSA1 stations only broadcast four percent of stories in block 2 while the SSA2 stations placed almost one-quarter (23%) of their stories in that block.

Table 48: Placement of stories across SSA1 & SSA2 stations*

	SSA1 stations	SSA2 stations
Block 1	**63**	**55**
Block 2	**4**	**23**
Block 3+	**33**	**22**
Total	***100***	***100***

p=<.05. *=percentage of stories

Duration: There was a statistically significant difference in the duration of the stories across the presentation modes for both station groups(Table 49). Each group spent about the same amount of time, on average, for the voice-over-by-anchor mode (40 and 47 average seconds for the SSA and SSA2 stations, respectively). However, the SSA2 stations spent significantly more time, on average, for the package presentation mode (128 seconds) than the SSA2 stations (107 seconds).

Table 49: Presentation mode & Duration* across SSA1 & SSA2 stations

	SSA1 stations	SSA2 stations
Voice-over by anchor	**40**	**47**
Package	**128**	**107**
Other**	**37**	**37**
All modes	***68***	***55***

p=<.05. *=mean number of seconds **=anchor-read, live location, reporter in newsroom.

Summary

The distribution of stories across the stations in the Wichita Falls market seemed to indicate that there was a difference in the stories that were covered by the SSA1 and SSA2 station groups. That is, almost seventy-five percent of the stories appeared either only on one or the other SSA1 station or only on one or the other SSA2 station. Further, no stories appeared on ***all*** of the stations, the only market in the sample in which that occurred. Clearly, the groups of stations made different news selection choices. And, for both station groups, local issues did not represent a high proportion of their stories.

The operators of the SSA2 agreement maintained a separation of the news operations. However, within the SSA1 stations, the effect of the agreement was evident. Thirty percent of the stories presented by the SSA1 group were broadcast on both stations. When that occurred, the audience saw stories with the same script eight out of ten times and the same video/graphics about ninety percent of the time.

Conclusion

The Notice of Inquiry regarding media ownership that the Federal Communication Commission issued in May 2010 specifically addressed the question of ownership structures within television markets. An increasing number of those structures now involve agreements among stations that are not ownership arrangements, but they stipulate a set of conditions in which the parties share fundamental aspects of the operation of the station (sales, marketing, news video or even news production). The obvious question is what might these arrangements mean for the issues of competition, diversity and localism in the markets in which they operate.

The stated purpose of the agreements was to achieve economies of scale in the production and distribution of news. That was to be accomplished by using two approaches. First, the production of news was consolidated as previously competitor news operations were combined into one news production entity. Second, the news that was produced by that entity was presented on the newscasts of the combined stations. The crucial question was how those practices affected the newscasts in the television market. The only way to truly understand that effect is literally to look at the content of those newscasts. Therefore, in this research, I conducted a content analysis of eight television markets to determine the distribution of stories across the broadcasts within the market and to examine the use of specific resources in the presentation of news.

What were the results of the analysis? The short answer is that the implementation of shared services (SSA) and local management/marketing (LMA) agreements had a profound effect on the local news broadcasts in the markets in which they operated. Specifically, the effect was evident in the distribution of stories across the stations and in the use of shared resources, such as the anchor, the reporter, the script and video/graphics for the story. That said, the effect on both of these characteristics was varied across the markets.

To wit: In most of the markets, the SSA or LMA stations broadcast a sizable proportion of stories on a ***combination*** of their stations:

- In Denver the proportion of combination stories was 71%;

- In Jacksonville, the SSA proportion of combination stories was 64%; but the duopoly in the market produced a simulcast so the proportion of combination stories for that arrangement was 100%;

- In Dayton, one LMA's proportion of combination stories was 98%, however, it was only 35% for the second LMA in the market;

- In Peoria, where there were no independent stations, the SSA proportion of combination stories was 78%; the LMA's proportion was 59%;

- In Burlington the SSA's proportion of combination stories was 58%;

- In Des Moines and Columbus, the proportion of combination stories was below half (49% and 40%, respectively);

- In Wichita Falls, where there were no independent stations, the proportion of combination stories for one SSA was only 30%, while the second SSA broadcast very few stories in combination.

From these findings we know that, for the most part, SSA and LMA stations took advantage of the arrangement to present stories on a combination of their stations. Given the nature of the agreements, we could expect that result.

The use of various "platforms" to present the stories was one aspect to consider. However, perhaps the most important factor to gauge the economies of scale achieved by the agreements was the use of particular resources that affect the bottom line---the personnel used to convey the content of the story (anchors and reporters) and the content used to describe the story (script and video/graphics). Both factors represented a cost to the station. The SSA and LMA stations took full advantage of the access to these resources, particularly scripts and video/graphics:

- In Denver, the LMA combination stories shared the same script and the same video/graphics about two-thirds of the time (62% and 67%, respectively);

- In Jacksonville, the sharing of script (21%) and video/graphics (47%) for the SSA was less prominent, but, by definition, the duopoly's simulcast in the market produced shared resources 100% of the time;

- In Dayton, the two LMAs handled the resources differently; 97% for both script and video/graphics for LMA1 (the same LMA whose proportion of combination stories was 98%) and 52% (script) and 80% (video/graphics) for LMA2;

- In Peoria, both the SSA and LMA stations used the same script for over nine out of ten stories (95% and 92%, respectively) and the same video/graphics for about the same proportion of stories (91% and 89%, respectively);

- In Columbus and Wichita Falls the proportion of combination stories in both markets was well below fifty percent, but when the stories were broadcast on the combination of stations, they used the same script most of the time (90% and 80% for Columbus and Wichita Falls, respectively) and the same video/graphics (86% and 89%, respectively);

- In Burlington about three-fourths of the combination stories used the same script and four out of five stories used the same video/graphics;

- In Des Moines the SSA had the least effect on the use of these resources, 37% of combination stories shared the same script and 55% shared the same video/graphics.

By these measures, we see that the SSAs and LMAs had their intended effects regarding the achievement of economies of scale. These measures focus on the very aspects of the agreements that their managers said would underpin the combined news operations---the use of multiple platforms and the shared use of resources. These findings confirm that the SSAs and LMAs functioned as planned---they used the multiple platforms and they shared the resources necessary to convey the stories. As I said previously in this report, we could expect those actions, otherwise the stated economic purposes of entering into the agreements would be moot. The obvious and unambiguous result was a reduction in the number of separate news voices in the markets.

There is an argument that the media landscape has changed drastically with more diverse ways to acquire news in local places. That is true. But, even

within that landscape, a recent survey by Frank N. Magid Associates confirms that local television news remains the most engaging source of information for citizens. Over half of the public (55%) reported that it was the most preferred medium for news and political information. Its nearest competitor is web sites/ Internet at only about one-fifth of respondents. Further, after news on search engines, local television news websites were the most frequently used source of news (Magid, 2010). In addition to a prominent information source, local television news also scored very highly on the key advertising effectiveness metrics of keeping viewers knowledgeable about products and services, trustworthiness and respectability (Magid, 2010). That said, even though local news is still a prominent information source for citizens, there are nuances to its use depending on subject matter and the age of the viewer (Pew Project for Excellence in Journalism, 2011).

The prominence of local television news was an important finding because it is, by far, the most profitable type of programming for local stations, accounting for forty-four percent of the stations' profits (Pew, 2010). Pew goes on to state that the proportion of stations' profits from newscasts is "increasingly significant" when considering that the average television station broadcasts an average of just over 4.5 hours of news per day. The remaining broadcast day---more than 19 hours---accounts for the other fifty-six percent of profits (Pew, 2010). Pew concludes that, "local news continues to play a critical role in local TV financing" (Pew, 2010). All this is to confirm the place that local television news holds in the calculus of media owners who recognize the value of the franchise.

In 2008 and 2009, local television stations were as affected by the economic crisis as other sectors of the economy (Pew, 2009, 2010). We should not underestimate the difficulties that faced the industry. For example, stations in markets 51-100 saw average station revenue drop thirteen percent between 2007 and 2008 (Pew, 2010). In contrast, 2010 saw a significant increase in media firms' revenues. For example, out of the $3 billion that was spent on political advertising in that year, $2.4 billion went directly to television stations (tvnewscheck, 2010). Further, television broadcasting revenue increased seventeen percent to $18.5 billion from 2009 to 2010. Of course, the fortunes of the media industry were sufficiently depressed in 2009 that the gains in 2010 could not be considered to be that impressive. However, there are forecasts that the fortunes of local television will realize single digit increases over the 2010 revenues (Malone, 2011).

The movement toward joint/shared/managing service agreements will undoubtedly continue. There are economic incentives for such endeavors. The latest case adds the Atlanta, Georgia DMA to the list of markets. Meredith Local Media, in the glow of a thirty percent increase in revenue, announced that it has entered into a joint service agreement with Turner Broadcasting to manage the operations of that company's Peachtree TV to begin later in 2011 (Malone, 2011). The record shows that these arrangements have invariably resulted in a loss of jobs in, at least, one of the stations involved in the agreement. For example, in Honolulu, the SSA between Raycom Media and MCG Capital Corporation resulted in the loss of 68 out of the 190+ jobs that comprised the staff of the three stations involved in the agreement (Dateline Media, 2010). The SSA between Fisher Communications and News Press/ Gazette in Idaho Falls, ID resulted in the loss of 27 jobs (Ariens, 2011). In Providence, RI, fifteen jobs were lost when Citadel Communications began a local marketing agreement with WLNE-6-ABC (Derderian, 2011). Such is the nature of mergers.

Media firms are trying to create new economic models. E.W. Scripps President/CEO Rich Boehne makes the case forcefully when he states that the model of free content offered by local newscasts and newspapers is unsustainable. Scripps will aggressively experiment with and create models that will take that "high-value premium content and derive much more revenue from it than we do today" (Malone, 2010). He continues that, "we very much believe that local broadcast markets over time will consolidate" (Malone 2010). He is confident enough in that assessment that he makes the offer to media firms to take over their news stations' operations saying that, "It is time to build brands and take market share, mind share, audience share under a local brand when we have the opportunity" (Malone, 2010).

In large measure, the Shared Services Agreements and Local Management/Marketing Agreements that we examined in this research created the very type of local brands that Boehne envisions. The SSA and LMA managers assiduously advanced the news brand, most often with the same slogan and on the same website. It is interesting to note, however, that the stations do not readily indicate the existence of the services agreements, except by inference. On their websites the "about us" sections do not typically offer any information about the arrangement. The inference comes from the claim of the same news brand and the same slogan.

Local television stations are private firms and they have a fiduciary responsibility to provide a return on investment for their owners. However, they conduct their business using a public good---the electromagnetic spectrum. And that imposes public interest responsibilities on the stations as well. Their newscasts are the most profitable portions of their programming. Therefore, there has been the perennial balancing act between what information the stations believe will "sell" and what information the public needs for informed citizenship, although the types of information may not be mutually exclusive. The examination of these television markets was prompted by an interest in a particular approach to those fiduciary and public interest responsibilities.

Further, the Federal Communications Commission will make decisions later in 2011 regarding media ownership as part of the Quadrennial Review. However, none of the studies that the FCC commissioned to support that decision-making process examined the types of services agreements that, by their stated intent, affect the structure of markets. The FCC's own research regarding market structure (Study 4: Local Information Programming and Structure of Television Markets) mentions the phenomenon, but it does not address its effects. It is my hope that this research will provide some information on the matter.

There is no doubt that the information landscape of the United States has changed in the last twenty years. There are many sources of information. But, local television news still holds a pre-eminent position as a news source for the public. The managers of the SSA and LMA stations recognize that fact, most often through an economic prism. That is understandable---media firms are businesses, first and foremost. The SSAs and LMAs were implemented to increase the bottom line---to create economies of scale in which the costs of the production and the dissemination of news were structured to increase profit. The question was, and will remain, what do we get, as a public, from these endeavors.

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