



Magid

SHAPING THE
HUMAN EXPERIENCE

TVNewsCheck
THE BUSINESS OF BROADCASTING

Monetizing the Omnimedia Landscape

April 19, 2026

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We are competing
in an attention economy.
The playing field is massive.

The Omnimedia playing field is massive

In this massive field, how do you stand out to consumers at the limit of their consumption?

THE AMERICAN MEDIA DIET:

13+
Hours per day



CONFUSION: Consumers don't articulate their media diet accurately, overstating *noble consumption*.



INUNDATION: 50,000 news brands. 5.7 average SVOD subscriptions giving access to 45,000 titles. Nearly a half million active podcasts... the consumer is drowning in options.



ENGAGEMENT: Most media time comes in the form of watching and listening (70%+).



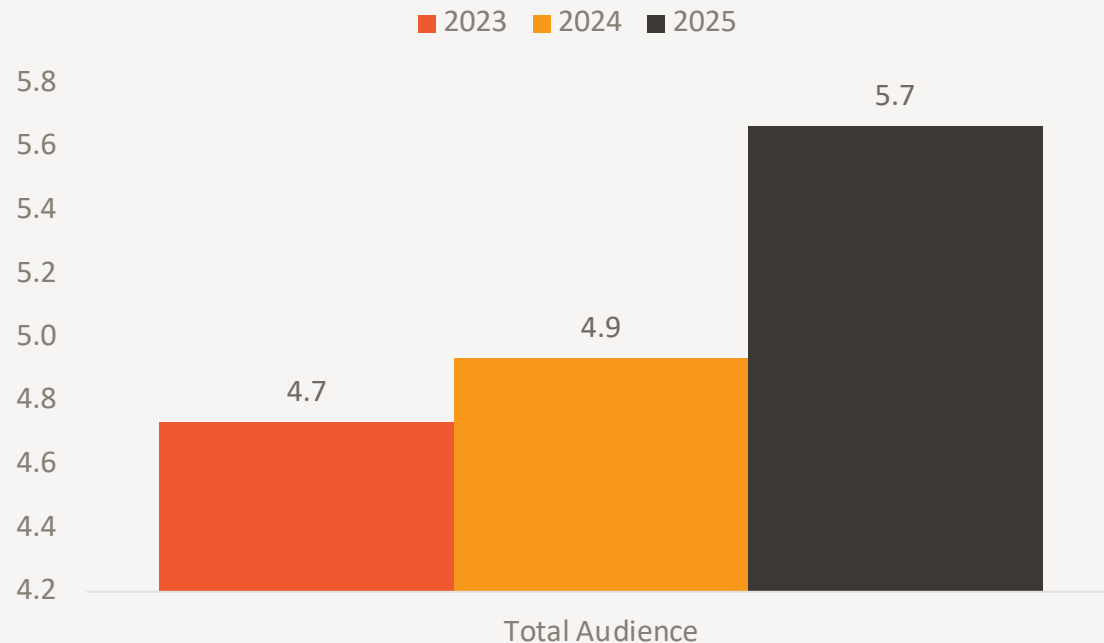
ATTENTION: Less than half of media time is *attention time*.



The battle isn't for content, it's for attention

With nearly 6 SVODs used per household, consumers are stretched thin and struggling to keep up

AVERAGE # OF SVODS USED IN THE HH



47% *I have trouble keeping up with everything I'd like to watch*

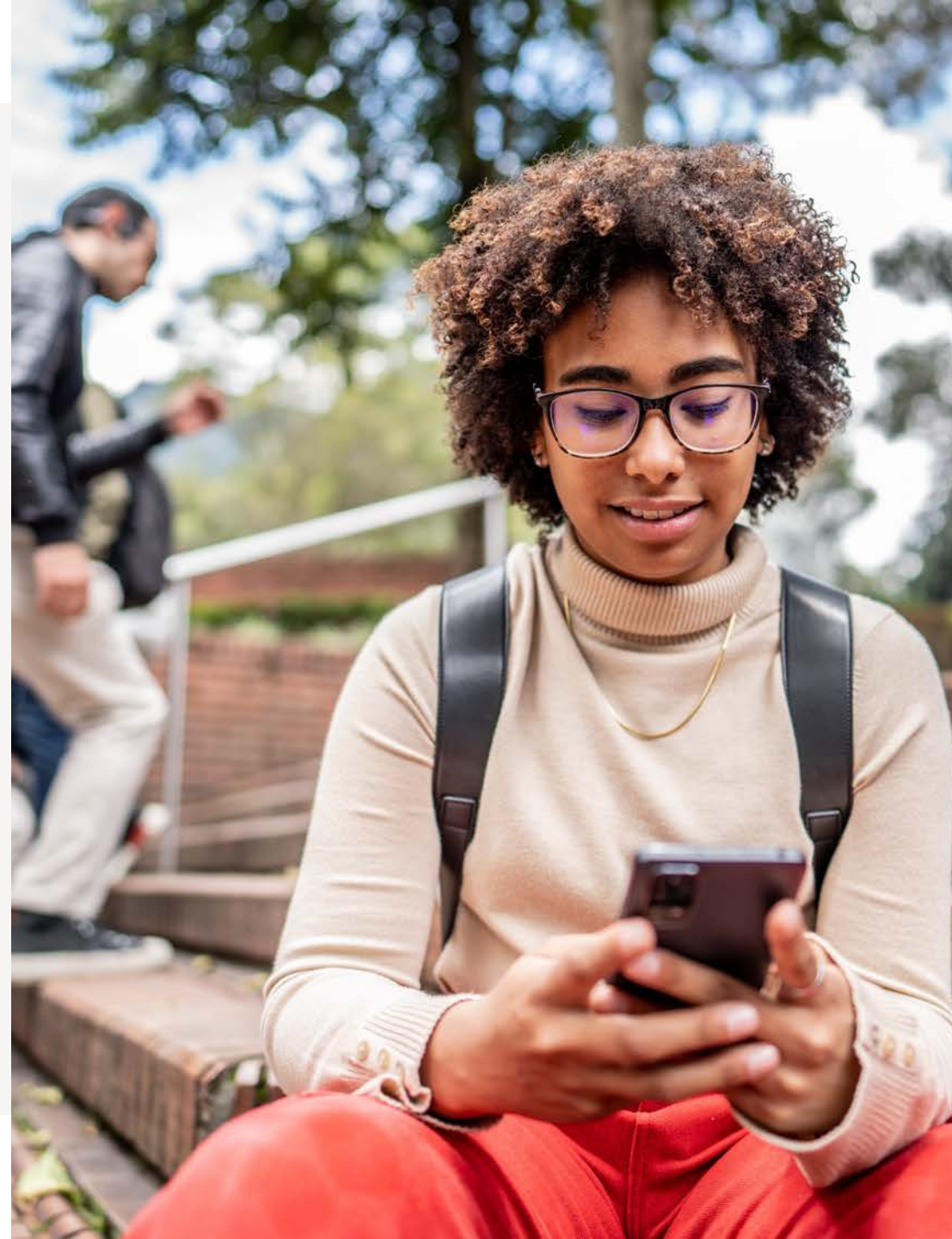
41% *I am overwhelmed by all the different streaming services I subscribe to*

% that somewhat agree /strongly agree

AI will place further downward pressure on consumption

51% Of news consumers already use AI platforms like Claude and ChatGPT to get news.

17% Of news consumers find out about news first from AI platforms. That's higher than email or push alerts.



Strategic shifts driven by the Omnimedia landscape

Winning media companies will prioritize attention

- Scale is an acquisition strategy, not an audience strategy.
- Attention > Consumption
- More attention > New attention
- Finding distinction requires us to level the attitudinal playing field.



The Omnimedia Landscape is an ARPU business.

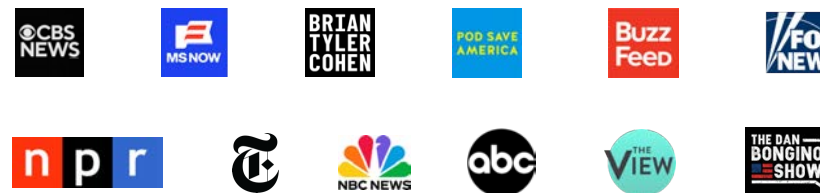
Finding what drives attention

The measurement gap: Behavioral data doesn't tell us *why* consumers invest attention

Magid has been leveling the field in entertainment media for more than a decade, testing thousands of TV and movie titles within a consistent attitudinal framework. We've evolved this approach for the information media landscape.

- More than 150 brands tested among 2,000 weekly news consumers, beginning an ongoing cadence
- Comprehensive brand evaluation
- Attitudinal description based on 44 emotional attributes
- Intentionality index
- Trust index
- Content drivers

Magid EmotionalDNA[®]



Sustaining and growing in the Omnimedia landscape

For consumers, every attention minute is equal. For advertisers (and you), it's not... how do you reap your unfair share?

01

PASSION

Brands that win attention create a strong connection based on emotional – not functional – attributes. In the Omnimedia landscape, you must create enough passion to drive active consumption.

02

INTENTION

Less than half of media attention is active attention. Brand motivates this, but so does platform. Intention is the strongest differentiator for broadcast brands. This has profound monetization value.

03

EFFICIENCY

You can't buy passion and intention. *Overhead Zero* creators are stealing a lot of attention on minimal budgets. But while their ability to grab attention is strong, monetizing that attention is not.

Attention-winning brands today
*capture passion through comfort,
confirmation, and context.*

Farewell, *Breaking News Era*. We've fully arrived in the *Context Era*.

These ideals have a massive impact on how to position your brand

Consumers look for comfort, affirmation in challenging times

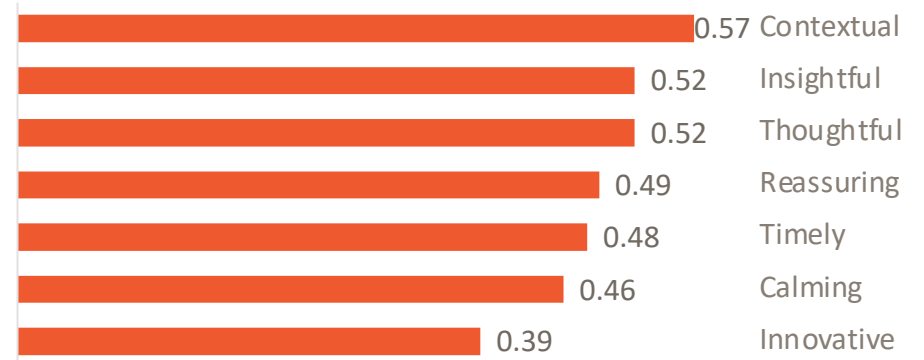
- Brands that deliver calm reassurance are perceived to be higher quality.
- Functional attributes have significant stated importance but don't move the needle when it comes to passion.
- Brands that fulfill these criteria are seen as least replaceable.

A deeper experience retains attention longer

- Snackable brands aren't seen to be high quality, and don't drive strong intention or usage metrics.

Building a modern, attention-earning brand requires you to uncouple who you are from what you do. What's your *vibe*?

Attributes strongly correlated with quality



Words that have no correlation with quality

Balanced	Explanatory
Essential	Trustworthy
Substantive	Reliable
Confident	Relatable
Accurate	Clear



Evaluation Scores: Top and bottom performers

Top 25	Brand	Evaluation
1	Brian Tyler Cohen	4.17
2	NPR	4.15
3	ProPublica	4.11
4	Dan Bongino	4.10
5	Glenn Beck	4.10
6	PBS NewsHour	4.09
7	Associated Press (AP)	4.09
8	Local NPR radio station	4.06
9	BBC News	4.05
10	The Hugh Hewitt Show	4.03
11	Financial Times	4.01
12	Last Week Tonight with John Oliver	4.01
13	Nick Shirley	4.00
14	Will Cain Podcast	4.00
15	The Majority Report w/ Sam Seder	3.97
16	Jorge Ramos	3.97
17	Local Independent TV station	3.96
18	Reuters	3.95
19	Carla Angola	3.94
20	The Silver Bulletin	3.93
21	Keith Edwards	3.93
22	The Rachel Maddow Show	3.92
23	Ground News	3.92
24	Puck News	3.91
25	Adam Mockler	3.91

Bottom 25	Brand	Evaluation
131	Patch	3.56
132	The Late Show with Stephen Colbert	3.55
133	Local Fox TV station	3.54
134	The Daily Beast	3.54
135	Amelia Dimoldenberg	3.53
136	Tim Pool	3.51
137	Candace Owens	3.51
138	Politico	3.51
139	The Hill	3.48
140	Wired	3.47
141	Breitbart News	3.46
142	Today	3.44
143	Local CW TV station	3.41
144	Vox	3.38
145	Huffington Post	3.38
146	Yahoo News	3.37
147	The Daily Mail	3.35
148	Jimmy Kimmel Live!	3.35
149	The Daily Wire	3.35
150	Call Her Daddy (Alex Cooper)	3.34
151	The Tonight Show Starring Jimmy Fallon	3.30
152	People	3.28
153	The View	3.25
154	Barstool	3.06
155	BuzzFeed News	3.06



Top 20 performers for top emotional attributes

CONTEXTUAL

Top 25	Brand	Evaluation
1	Brian Tyler Cohen	62%
2	Nick Shirley	58%
3	Keith Edwards	57%
4	The Rachel Maddow Show	57%
5	NPR	56%
6	Last Week Tonight with John Oliver	56%
7	PBS NewsHour	54%
8	Steven Crowder	53%
9	Local NPR radio station	52%
10	Associated Press (AP)	52%
11	Local Independent TV station	50%
12	Local Spectrum News	49%
13	Local CBS TV station	49%
14	Local CW TV station	49%
15	Financial Times	49%
16	The Guardian	49%
17	The Majority Report w/ Sam Seder	48%
18	Meidas Touch	48%
19	Al Jazeera	47%
20	Dan Bongino	47%

INSIGHTFUL

Top 25	Brand	Evaluation
1	NPR	57%
2	Last Week Tonight with John Oliver	56%
3	ProPublica	56%
4	Sean Hannity	55%
5	Brian Tyler Cohen	54%
6	Keith Edwards	54%
7	Laura Ingraham	53%
8	The Rachel Maddow Show	53%
9	Democracy Now	53%
10	Meidas Touch	52%
11	The Five	51%
12	PBS NewsHour	51%
13	The Megyn Kelly Show	51%
14	David Pakman	50%
15	Jesse Watters Primetime	49%
16	The Charlie Kirk Show	48%
17	The Parnas Perspective	48%
18	Steven Crowder	47%
19	Glenn Beck	47%
20	Candace Owens	47%

REASSURING

Top 25	Brand	Evaluation
1	Sean Hannity	63%
2	Brian Tyler Cohen	59%
3	Laura Ingraham	56%
4	Local Spectrum News	56%
5	NPR	53%
6	Associated Press (AP)	52%
7	The Rachel Maddow Show	52%
8	Meidas Touch	51%
9	The Five	50%
10	Jesse Watters Primetime	50%
11	Reuters	50%
12	The Economist	49%
13	HLN (Headline News)	49%
14	PBS NewsHour	49%
15	The New Yorker	48%
16	Last Week Tonight with John Oliver	48%
17	Local NPR radio station	48%
18	Local CW TV station	48%
19	Will Cain Podcast	47%
20	Local Independent TV station	46%

CALMING

Top 25	Brand	Evaluation
1	Last Week Tonight with John Oliver	40%
2	Brian Tyler Cohen	38%
3	David Pakman	37%
4	The Young Turks	36%
5	Local NPR radio station	35%
6	Pivot	34%
7	Secular Talk (Kyle Kulinski)	34%
8	The Rachel Maddow Show	33%
9	Democracy Now	32%
10	Associated Press (AP)	32%
11	PBS NewsHour	31%
12	The Parnas Perspective	31%
13	NPR	30%
14	Molly Jong-Fast	29%
15	VINCE	29%
16	Keith Edwards	29%
17	The Bulwark	28%
18	Jesse Watters Primetime	28%
19	ProPublica	28%
20	Sean Hannity	27%



Trust Index: Top and bottom performers

Top 25	Brand	Evaluation
1	Adam Mockler	100
2	Brian Tyler Cohen	100
3	The Parnas Perspective	93
4	Glenn Beck	91
5	NPR	89
6	PBS NewsHour	88
7	Dan Bongino	87
8	The Rachel Maddow Show	86
9	Local NPR radio station	85
10	Financial Times	83
11	The Week	81
12	BBC News	81
13	Local Independent TV station	81
14	Keith Edwards	80
15	Meidas Touch	79
16	ProPublica	79
17	Sean Hannity	79
18	Cheddar	78
19	The Majority Report w/ Sam Seder	77
20	The Benny Johnson Show	77
21	Last Week Tonight with John Oliver	75
22	Reuters	75
23	Nick Shirley	74
24	Al Jazeera	74
25	NBC Nightly News	74

Top 25	Brand	Evaluation
131	HLN (Headline News)	46
132	Tim Pool	45
133	Scripps News	45
134	Joe Rogan	42
135	Pivot	41
136	The Late Show with Stephen Colbert	39
137	Yahoo News	38
138	Wired	37
139	Today	36
140	Under the Desk News	35
141	People	35
142	The Ezra Klein Show	34
143	Huffington Post	34
144	Daily Kos	34
145	Jimmy Kimmel Live!	32
146	RealClearPolitics	28
147	Talking Points Memo	27
148	Vox	25
149	Call Her Daddy (Alex Cooper)	21
150	The Daily Wire	19
151	The Tonight Show Starring Jimmy Fallon	16
152	The Daily Mail	15
153	The View	13
154	BuzzFeed News	6
155	Barstool	0

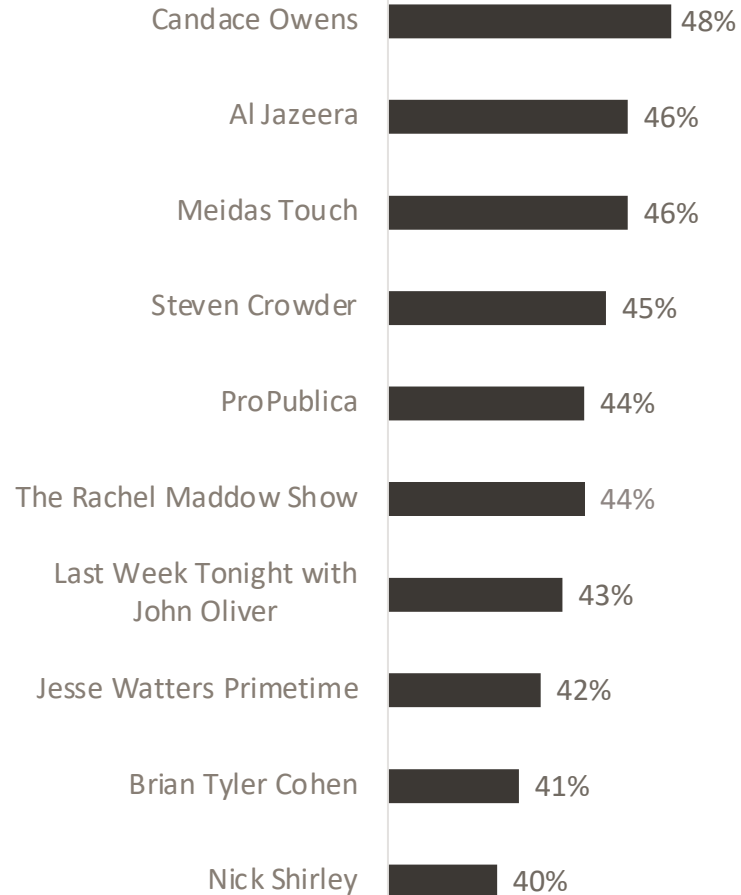
Community is not a geographic concept

Consumers clearly do not connect “community” with the place they live. In fact, most local brands fell in the bottom half of the list for this attribute.

What does represent Community?

- Psychographic interests
- Moral/social groups
- Politics
- Culture

10 Most Community-Connected Brands



BONUS
CONTENT
★★★★

Being “Essential” isn’t enough

Local news is widely seen as essential, but that perception does not translate into stronger engagement, trust, or preference

HIGH PERCEIVED NECESSITY

Local news leads on “Essential”

- Local Newspaper ranks #1
- Local TV Stations also dominate top ranks
- 30–40% of users describe these sources as “essential”

LOW BEHAVIORAL IMPACT

But “Essential” has little impact on key outcomes

- No relationship between the Trust Index, Intentionality, Evaluation, or Usage



Top 20 Brands for "Essential"	Essential %
Local Newspaper	40%
Local NBC TV station	39%
Time Magazine	37%
PBS NewsHour	36%
Local CBS TV station	35%
The Charlie Kirk Show	34%
Local public TV station	33%
The Hill	33%
VINCE	32%
PBS	32%
Local public media radio station	32%
Associated Press (AP)	32%
NPR	31%
The Washington Post	31%
Local Independent TV station	31%
The Ben Shapiro Show	30%
Ethan Klein	30%
Local ABC TV station	30%
Newsweek	30%
Local Fox TV station	30%



A casualty of the Context Era? Trust.

Given 44 emotional attributes to evaluate specific news brands, “trustworthy” was the 39th most selected attribute.

What is driving actual trust (The Trust Index)?

- **Depth:** Brand attributes like Contextual, Deep and Insightful, have strong correlations with trust.
- **Confirmation:** Reassuring and even Biased are strong drivers of trust. Use is driven by trust, but the consumer doesn’t define it through balance.

It is time to reinvent *trust*. We’ve lost the meaning in the eye of the consumer, and they’ve filled the void with their own definition.

Attributes used to describe news brands

Rank	Attribute	Attribute %
1	informative	43%
2	contextual	37%
3	reassuring	35%
4	biased	35%
5	deep	34%
6	insightful	33%
7	immediate	30%
8	thoughtful	30%
9	balanced	29%
10	fast-paced	29%
<hr/>		
35	shallow	13%
36	meaningful	11%
37	fresh	9%
38	overwhelming	8%
39	trustworthy	8%
40	powerful	7%
41	dramatic	7%
42	fake	6%
43	sensationalized	5%
44	intelligent	5%

top 10

bottom 10



WINNERS AND LOSERS

Passion

WINNERS



Public media: This sleeping giant is positioned for growth, particularly in the local market.



People: The top brands are much more likely to be a person vs an organization.



Polarizing perspectives: Ideologically unbalanced brands test well.

LOSERS



Digital pioneers: The brands that defined the shift to digital are some of the lowest testing.



Breadth: Variety formats or light news tend to be in the bottom quartile of brands.



Comedy: Shows that lead with humor are not well evaluated in the news landscape.

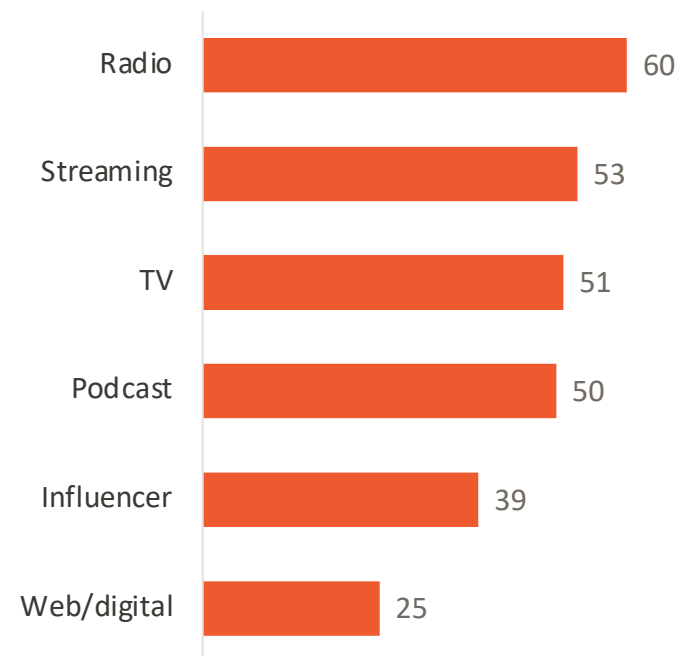
In a landscape of virtually limitless choice,
*intentional behavior drives more frequent
use and stronger monetization.*

Not all attention is the same

Magid's Intentionality Index identifies brands and platforms that drive active consumption, a critical driver for revenue

Active
↑
↓
Passive

- I intentionally seek this source out
- This source fits easily into my day
- I use this source because it covers issues that matter to people like me
- I go to this source first when I want news
- I use this source to stay informed about what's happening in my community
- I use this source mainly when something major is happening
- I use this source mainly for a small set of specific topics
- I see content from this source even when I'm not actively looking for it
- I keep up with this source passively without actively seeking it out
- This source appears in my feed regularly despite my lack of interest
- I rarely think about this source unless I see it somewhere else



What drives intentionality?

The keys for focused attention

Platform

- TV and audio brands drive very strong intentionality, in part due to the need to “tune in.”
- For TV, intentionality is so strong it can help a brand outperform modest evaluations.

Passion

- Many of the brand attributes that drive passion also drive intentionality: Contextual, Reassuring, Insightful, Deep, Calming.
- With some additional attributes: Investigative, Biased, Outrageous, Community-Connected.

Trust

- There is a strong correlation with Trust and Intentionality. But remember, this is the consumer definition of trust (Confirmation).

	Brand	Index score	Probability
<i>top 10</i>	Local NPR Station	100	84
	Dan Bongino	93	81
	Glenn Beck	92	80
	Sean Hannity	91	80
	Local Independent TV Station	90	80
	The Five	85	77
	NPR	82	75
	Jesse Watters Primetime	79	74
	Local CBS station	77	72
	PBS Newshour	77	72
<i>bottom 10</i>	Barstool	14	27
	Patch	14	27
	Under the Desk News	13	27
	The Atlantic	12	26
	Hot Air	6	23
	Daily Kos	5	22
	BuzzFeed News	5	22
	Puck News	1	20
People	.14	20	
Huffington Post	0	20	





Intentionality Index: Top and bottom performers

Top 25	Brand	Evaluation
1	Local NPR radio station	100
2	Dan Bongino	93
3	Glenn Beck	91
4	Sean Hannity	91
5	Local Independent TV station	90
6	The Five	85
7	NPR	82
8	Associated Press (AP)	80
9	Jesse Watters Primetime	79
10	Local CBS TV station	77
11	PBS NewsHour	77
12	Last Week Tonight with John Oliver	76
13	Brian Tyler Cohen	76
14	Meidas Touch	76
15	Laura Ingraham	75
16	David Pakman	73
17	The Rachel Maddow Show	72
18	Local NBC TV station	68
19	ABC World News Tonight	65
20	Local public TV station	65
21	Local Newspaper	65
22	Financial Times	65
23	Fox News	64
24	Real Time with Bill Maher	63
25	Democracy Now	62

Top 25	Brand	Evaluation
131	The Young Turks	21
132	Jesse Dollemore	19
133	Amelia Dimoldenberg	19
134	Gray National	19
135	Scripps News	19
136	The Daily Wire	19
137	OutKick	18
138	Letters from an American	18
139	The Hugh Hewitt Show	18
140	The Free Press	17
141	The Conversation	17
142	Reason	16
143	The Daily Mail	16
144	RealClearPolitics	16
145	Barstool	14
146	Patch	14
147	VINCE	14
148	Under the Desk News	13
149	The Atlantic	12
150	Hot Air	6
151	Daily Kos	5
152	BuzzFeed News	5
153	Puck News	1
154	People	0
155	Huffington Post	0

How does all this impact revenue?

For advertisers and media companies, every minute of attention is NOT the same



STRENGTH

- TV monetizes attention better than any other platform.
- High intentionality overcomes inconsistent quality.

CHALLENGE

- “Mass” is a fading target. Can you win with Niche?
- Lack of first-party data.



STRENGTH

- Radio and podcast are big attitudinal winners – evaluation and intentionality.

CHALLENGE

- When it comes to monetizing attention, it massively underperforms its audience affinity.



STRENGTH

- A LOT of attention minutes.
- Digital natives have better first-party data.
- Premium subscription brands are great monetizers.

CHALLENGE

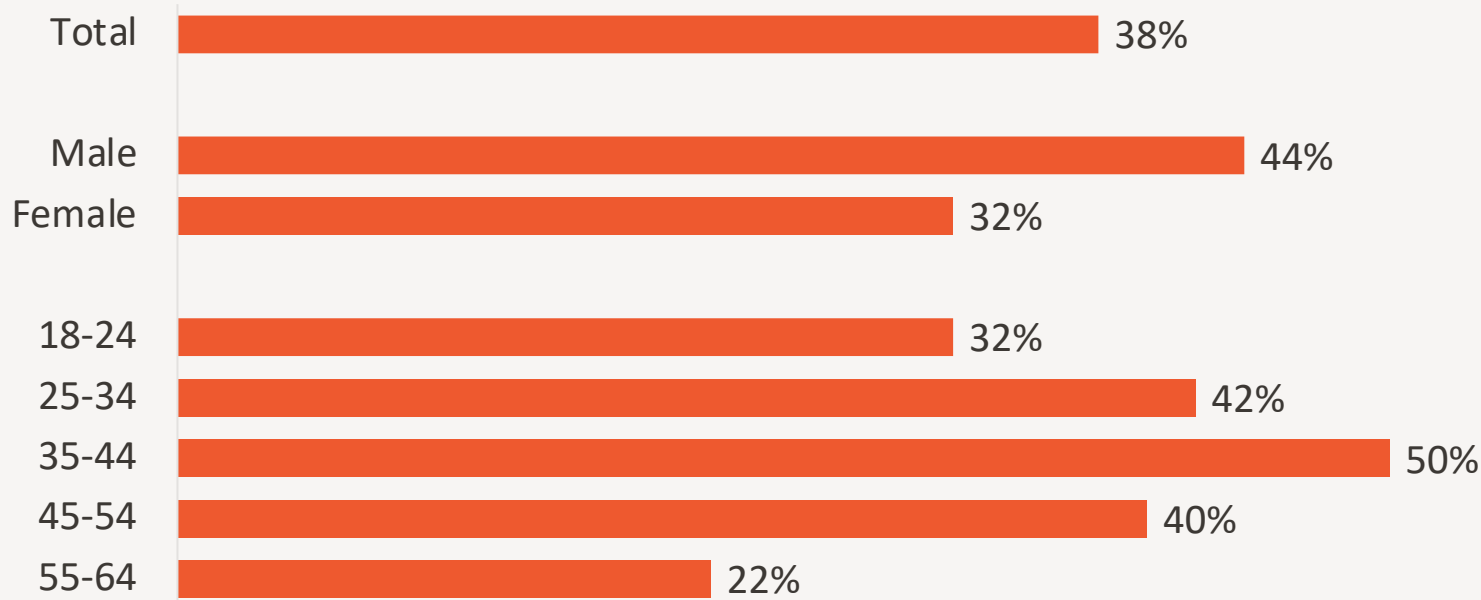
- Very passive attention leads to bad proportional monetization.
- Growing personalities subject to the “tech tax.”

When it comes to monetizing attention, TV is still the 800-lb gorilla of the media business.



About one-third currently pay for news; highest willingness to pay among 35–44s and men

Likely to pay for a source that provides valuable content

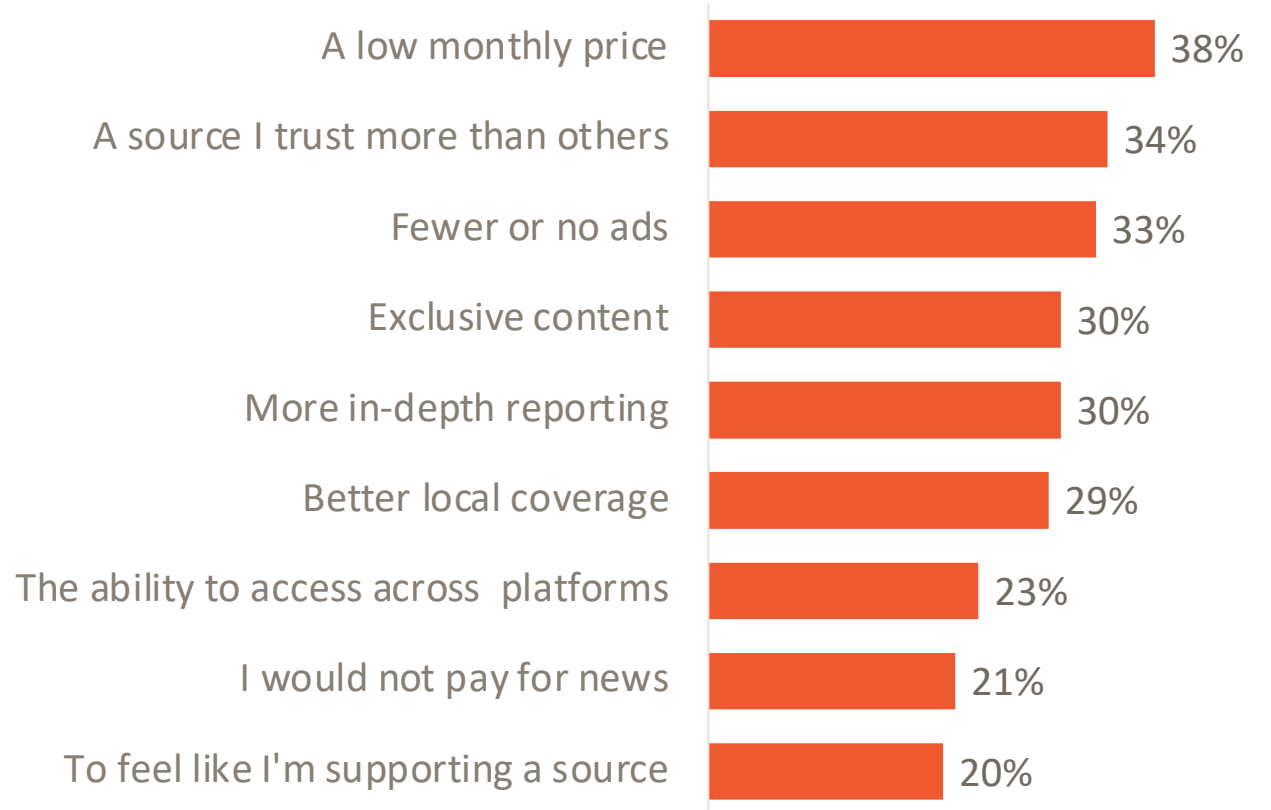


31%

Currently pay for access to any news or information sources



What would make your more likely to pay for a news source?



Affordability is the top driver of news subscriptions, with trust and ad-light experiences close behind

Paid News subscribers are more engaged, more intentional, and more connected



The value of paid news audiences isn't just consumption: it's deeper engagement across platforms and communities. Paid subscribers over-index on high-intent, community-driven behaviors like podcasts, live events, and real-world engagement.

Which of the following activities or interests apply to you? (Select all that apply)

■ Paid News Subscribers ■ Non-Subscribers



At a baseline level, both groups look relatively similar when it comes to things like watching TV or using social media, but the real differences emerge when we look at more active forms of engagement

Activities/Interests	Gen Pop	Paid News Subs	Index
Watching live TV regularly	58%	60%	104
Using social media to stay informed	55%	53%	97
Following current events closely	47%	51%	108
Streaming on-demand video content	48%	49%	102
Discussing news or issues with friends or family	48%	48%	100
Playing video games	47%	48%	102
Listening to podcasts	39%	46%	118
Attending live events (sports, concerts, etc.)	37%	44%	118
Participating in community events	26%	35%	135

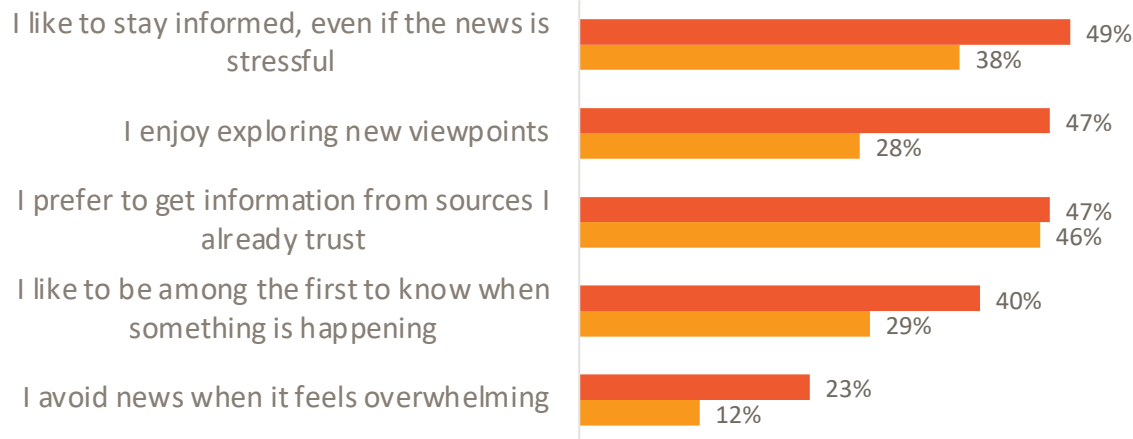


High-Intent audiences want more and know when to pull back

Paid news users seek depth, new perspectives, and immediacy but are more likely to step back when content becomes too much

Please indicate how much you agree or disagree with each statement (Strongly Agree/TB % on a 5-point scale)

■ Paid News Subscribers ■ Non-Subscribers

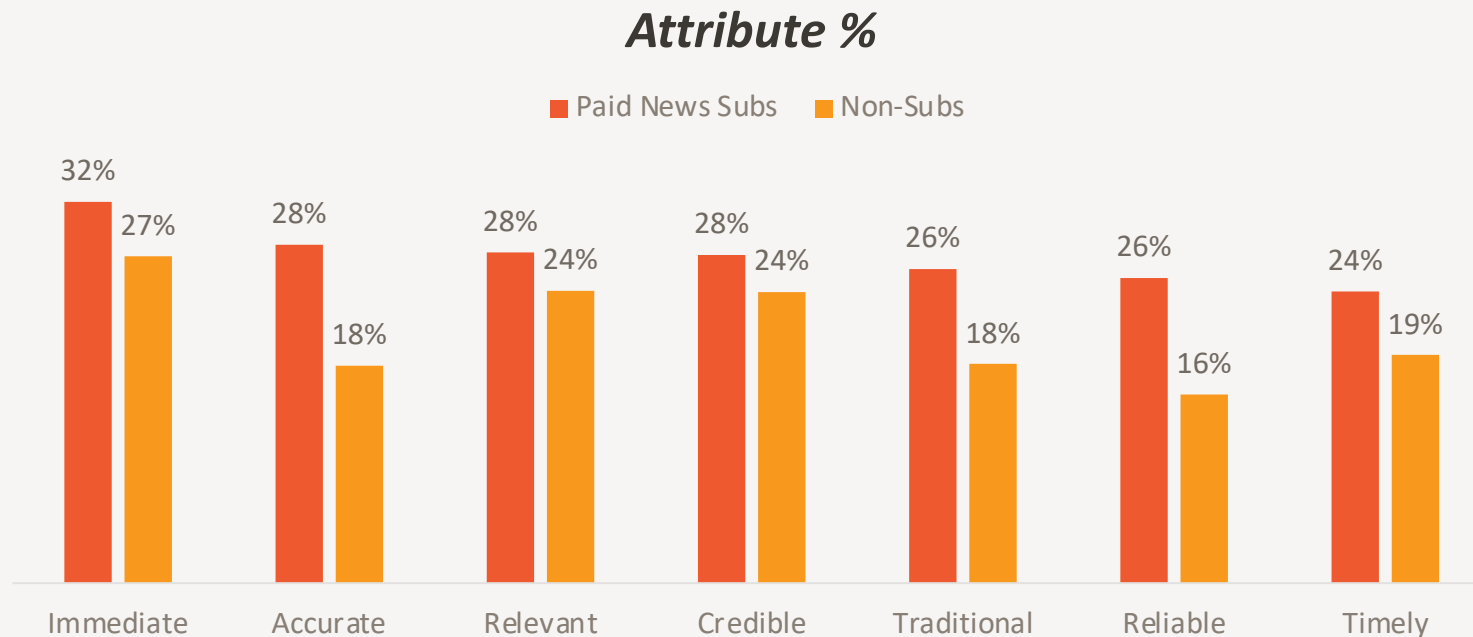


Statement	Gen Pop	Paid News Subs	Index
I like to stay informed, even if the news is stressful	42%	49%	119
I prefer to get information from sources I already trust	47%	47%	101
I enjoy exploring new viewpoints	34%	47%	138
I like to be among the first to know when something is happening	33%	40%	123
I avoid news when it feels overwhelming	15%	23%	148



Subscribers don't just want news. They want something they can rely upon.

Paid news subscribers over-index on attributes tied to real-time access and dependable delivery



Speed/Access

- Immediate: Index 116
- Timely: 128

Dependability

- Reliable: Index 162
- Accurate: Index 156
- Traditional: Index 143
- Relevant: Index 113
- Credible: Index 113

Of all the things that drive affinity,
money isn't one of them.
*It's not about 'more with less,' it's
about 'different.'*

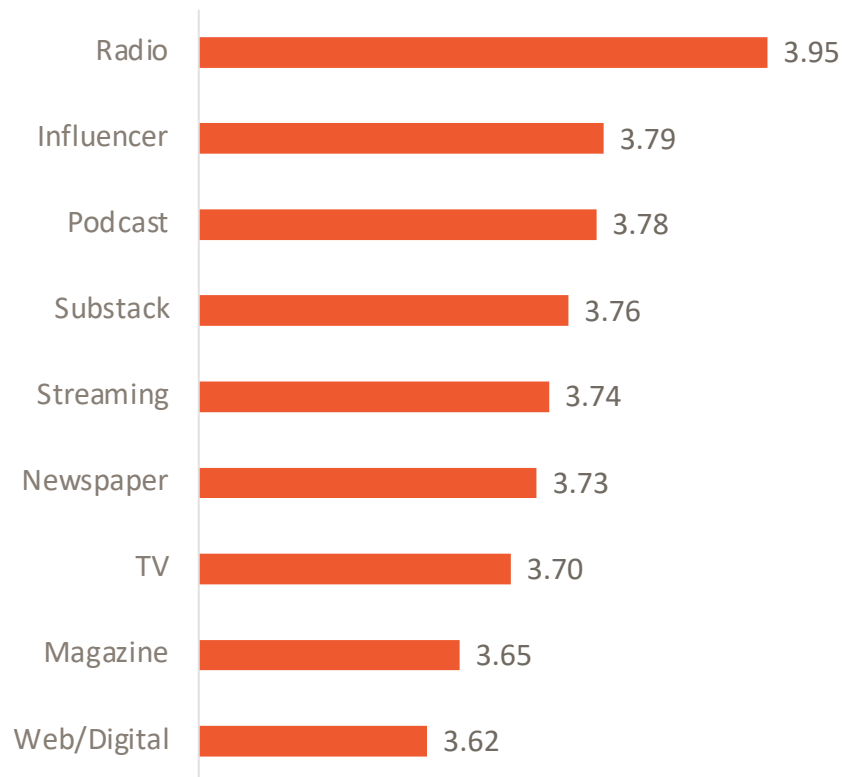
Money can't buy you (brand) love

When it comes to evaluating quality, half of the brands in the top quartile are influencers, podcasters, or independent creators. Looking at the whole list, **we find no correlation between production budget and quality, trust or intentional use.**

Sorting into platform, radio, influencers, Substack creators, and podcasts all have stronger average evaluation scores than TV-centric brands.

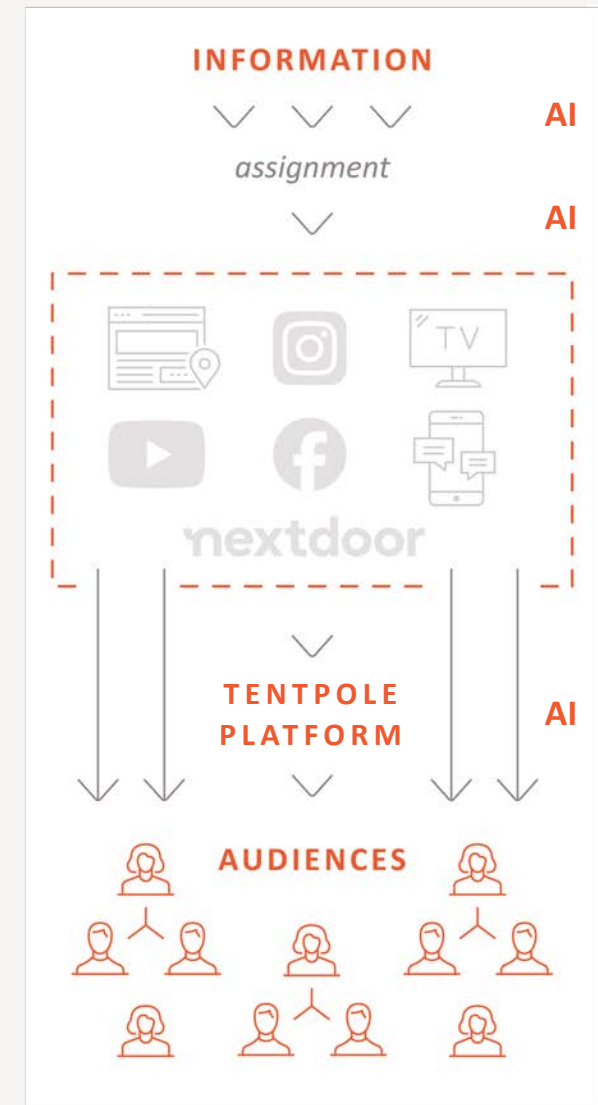
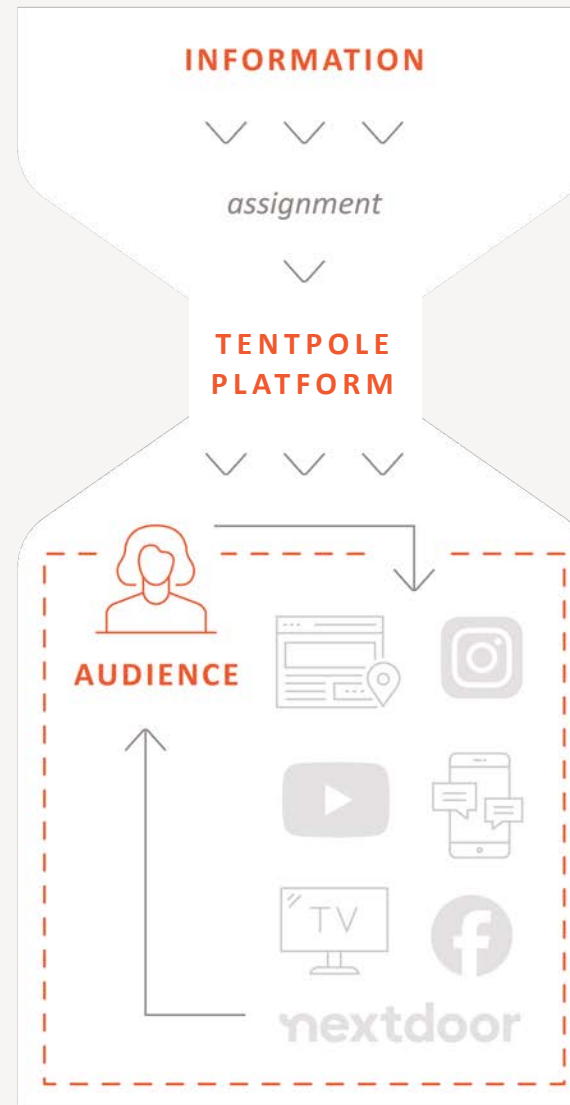
Traditional media brands need to leverage bigger budgets by looking differently at what they do and how they reach audiences.

Evaluation: Brand rating by platform



The Omnimedia landscape needs Omnimedia strategies, tools and workflows

- Maximizing audience attention requires a different view of how you reach your audience. What is your engagement priority?
- Legacy brand workflows tend to be built around a tentpole platform. That won't deliver sustainable, profitable growth. To be a macro brand, you've got to deliver value across touchpoints... or don't be a macro brand...
- Information media's entrance into the AI era has been superficial and insufficient. Technology needs to have a symbiotic relationship with workflow. You can't wedge new tech into an old operating model and expect success.



SUMMARY

The Omnimedia Landscape
delivers significant opportunity

Opportunities in the Omnimedia Landscape

Factors to consider:

- 01 BUILD BRANDS THAT DELIVER VALUE TO CONSUMERS THE WAY THEY DEFINE IT.**

Tactical perceptions are a death sentence. You've got to narrow your focus and go deep. This requires innovative brands to look at a level attitudinal playing field and prioritize efforts that drive intentional consumption and engagement.
- 02 PARTICIPATE IN THE PROFESSIONALIZATION OF INFLUENCE.**

People make connections, and consumers are spending a lot of attention hours on personalities directly. How can you help the next generation of news talent avoid some of the "tech tax" and monetize more effectively (while getting a share)? How can they help you open new revenue streams? And note: your talent are influencers too.
- 03 REBUILD THE OPERATING MODEL FOR A NEW ERA.**

Influencers and prominent talent aren't stealing influence by spending a lot of money. Scale costs... but look at where you spend on content. You can be efficient if you think differently about your strategy and look to compete by the rules of an Omnimedia Landscape.



thank you!

JAIME SPENCER

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