

On the Road to Recovery

By Bob Papper

The latest RTNDA/Ball State University Survey shows both television and radio recovering from last year's drop in news and staff. While neither category in local television news is back to the all-time highs recorded in the fourth quarter of 2000, both are up enough from last year to stand at their second highest levels ever. Local TV news employment is up 4 percent from a year ago, and the amount of local TV news edged up to recover some of last year's small loss.

The television staff increases were largely across the board, although a second straight year of losses among independent stations led to a drop in full time employment in top 25 markets. Perhaps making up for that loss, the number of part-timers in the largest markets soared—up 25 percent.

Radio consolidation makes it almost impossible to compare numbers over time. Today, over 95 percent (95.3 percent) of radio news departments handle the news for more than one station.

TV Staff Size – 2003

	Avg Full-time	Median Full-time	Maximum Full-time	Avg Part-time	Median Part-time	Maximum Part-time	Avg Total Staff	Median Total	Maximum Total Staff
All TV	32.5	27.0	126	4.1	2.0	65	36.6	32.0	140
Big Four Affiliates	34.6	29.0	126	3.8	2.0	40	38.4	33.0	140
Other Commercial	18.9	11.5	47	3.9	1.0	14	22.8	13.5	61
Market Size:									
1-25	50.0	46.0	126	6.5	3.0	40	56.5	53.5	140
26-50	44.9	48.0	85	4.0	3.0	16	48.9	50.0	91
51-100	36.9	36.0	100	4.6	2.0	65	41.5	40.0	100
101-150	24.1	25.0	57	3.9	2.5	17	28.0	28.0	67
151+	19.1	15.0	84	2.1	1.5	10	21.2	19.0	84

The overall staff in local TV news rose 4 percent from a year ago—after a 14.6 percent drop last year. All market sizes rose except top 25, where a second year of losses among independent stations resulted in the average staff size falling in the biggest markets. Part time staff rose in all markets except the smallest, where it remained the same. Generally, the staffs at ABC and Fox affiliates were smaller than those at CBS and NBC stations. News staffs at PBS affiliates—where they exist at all—are tiny. There were no significant geographic variations, although news staffs were a little smaller in the Midwest.

Staff Size Changes 2003 v 2002

	Increase	Decrease	Same
All TV News	27.3%	23.5%	49.2%
Big Four Affiliates	26.3%	22.5%	51.2%
Other Commercial	33.5%	55.5%	11.0%

This table shows how the staff picture has really turned around from a year ago. The number of stations reporting an increase is up 42.2 percent from last year, but even more significantly, the number of stations reporting a staff decrease dropped by 56.6 percent. That's despite an increase in the number of independent stations which cut their staff size. The biggest growth came in markets 51 – 100 with the smallest growth in 26 – 50 and 151+. CBS and NBC affiliates were most likely to grow, and stations in the Midwest were least likely to increase.

Planned Staff Changes for 2003-2004

	Increase	Decrease	Same	Not Sure
All TV News	31.8%	2.9%	56.5%	8.8%
Big Four Affiliates	31.4%	2.4%	58.6%	7.6%
Other Commercial	20.0%	20.0%	30.0%	30.0%

Historically, news directors tend to be optimists on this question, but they're a lot more optimistic this year than last. There's a 62.2 percent jump in the number of news directors who expect staff size to grow this year and a 78.9 percent drop in the number of news directors who expect staff decreases—and most of those are at independent stations. Generally, the bigger the current staff, the more likely the news director to expect growth. Fox affiliates and stations in the West were most likely to expect expansion.

Amount of News Changes 2003 v 2002

	Increase	Decrease	Same	Don't Know
All TV News	32.5%	5.4%	61.7%	0.4%
Big Four Affiliates	33.3%	4.8%	61.4%	0.5%
Other Commercial	10.0%	0	90.0%	0
Market Size:				
1-25	25.8%	0	74.2%	0
26-50	16.7%	5.6%	77.7%	0
51-100	41.3%	6.3%	50.8%	1.6%
101-150	28.0%	8.0%	64.0%	0
151+	48.6%	2.9%	48.5%	0

There was a modest increase in the number of stations saying they increased the amount of news they run--mostly in markets 51-100 and 151+. There was little difference based on staff size, geography or affiliation, other than independents were a lot less likely to have increased the amount of news.

Hours of Local TV News per Day – 2003

	Average Weekday	Weekday Maximum	Average Saturday	Saturday Maximum	Average Sunday	Sunday Maximum
All TV News	3.3	9.5	1.2	9.5	1.2	9.5
Big Four Affiliates	3.5	9.5	1.3	6.0	1.2	4.5
Other Commercial	2.9	9.5	1.4	9.5	1.4	9.5
Market Size:						
1-25	3.8	8.0	1.7	6.0	1.7	4.5
26-50	3.7	9.5	1.6	9.5	1.7	9.5
51-100	3.4	9.5	1.3	4.0	1.2	4.0
101-150	3.1	5.5	1.0	4.5	0.9	2.0
151+	2.8	5.0	0.8	2.5	0.7	2.0
Staff 51+	4.5	9.5	2.0	6.0	2.0	4.5
Staff 31-50	3.4	8.0	1.3	4.5	1.1	2.5
Staff 21-30	2.9	5.0	0.9	3.0	0.8	1.5
Staff 11-20	2.4	4.5	0.6	1.5	0.6	3.0
Staff 1-10	1.9	5.5	0.4	2.0	0.5	2.0
ABC	3.3	6.5	1.1	4.0	1.1	4.0
CBS	3.8	9.5	1.3	4.5	1.1	4.5
Fox	2.2	8.0	0.8	3.5	0.9	3.5
NBC	3.8	8.0	1.6	6.0	1.4	4.5
PBS	0.8	1.5	0.2	1.0	0.2	1.0

The average amount of local television news rose this past year—after its first ever decline a year ago. The average weekday rose by 1.5 percent, recovering 3 of the 15 minutes lost a year ago. Overall, the amount of local TV news is at the second highest level ever—after the record news and staff of 2000/2001. Saturday and Sunday news levels remained exactly the same as a year ago.

TV News Budget ... 2003 v 2002

	Increase	Decrease	Same	Don't know
All TV News	41.0%	21.8%	35.5%	1.7%
Big Four Affiliates	42.9%	22.0%	33.7%	1.4%
Other Commercial	22.2%	22.2%	55.6%	0
Market Size:				
1-25	46.7%	16.7%	36.6%	0
26-50	28.1%	28.1%	43.8%	0
51-100	42.6%	23.0%	32.8%	1.6%
101-150	43.4%	19.7%	34.2%	2.7%
151+	40.0%	22.9%	34.3%	2.8%

Reflecting staff growth, news budgets also rose this past year. There was a 36.2 percent growth in stations reporting an increase and a 28.5 percent drop in the stations reporting smaller news budgets.

Amount of News Planned ... 2003 v 2002

	Increase	Decrease	Same	Not sure
All TV News	27.2%	0.8%	61.5%	10.5%
Big Four Affiliates	24.9%	0.5%	64.1%	10.5%
Other Commercial	10.0%	10.0%	60.0%	20.0%
Market Size:				
1-25	19.4%	0	67.7%	12.9%
26-50	22.9%	5.7%	62.9%	8.5%
51-100	25.4%	0	65.1%	9.5%
101-150	28.0%	0	61.3%	10.7%
151+	40.0%	0	48.6%	11.4%

The figures for the amount of news planned for this year are virtually identical to the figures projected a year ago.

TV News Profitability ... 1997 to 2003

	2003	2002	2001	2000	1999	1998	1997
Showing profit	55.3%	54.9%	56%	58%	57%	63%	62%
Breaking even	13.6%	11.6%	13%	11%	9%	11%	6%
Showing loss	9.2%	11.2%	10%	11%	11%	10%	8%
Don't know	21.9%	22.3%	21%	20%	23%	16%	24%

The latest figures slightly reverse a general downward trend in TV news profitability. That might simply reflect a stronger economy, but note that local TV news profitability hardly suffered—even in the height of the economic downturn.

TV News Profitability ... by Size and Affiliation - 2003

	Showing profit	Breaking even	Showing loss	Don't know
Market size				
1-25	55.2%	10.3%	10.3%	24.2%
26-50	57.6%	9.1%	15.2%	18.1%
51-100	66.7%	10.5%	1.8%	21.0%
101-150	49.3%	17.3%	10.7%	22.7%
151+	47.1%	17.6%	11.8%	23.5%
Full-time staff				
51+	63.6%	9.1%	9.1%	18.2%
31-50	69.0%	8.5%	5.6%	16.9%
21-30	63.6%	15.9%	4.5%	16.0%
11-20	32.4%	23.5%	17.6%	26.5%
1-10	15.0%	25.0%	25.0%	35.0%
Affiliation				
ABC	51.7%	18.3%	11.7%	18.3%
CBS	65.4%	11.5%	3.8%	19.3%
Fox	53.6%	14.3%	7.1%	25.0%
NBC	61.7%	10.0%	8.3%	20.0%
Big four affiliates	58.5%	13.5%	8.0%	20.0%
Other commercial	40.0%	20.0%	30.0%	10.0%

Most market sizes held steady on profitability, although the smallest markets rose more than any other, and the largest markets slipped the most—due mostly to lower profitability among independents. Note that smaller news operations are considerably less likely to make a profit on news. Fox affiliates—with generally less news—and ABC affiliates—with weaker network programming—were less likely to make money on news. Independent stations were far less likely to make money on news and much more likely to lose money than the others.

Percentage of TV Station Revenue Produced by News

	Average	Median	Minimum	Maximum	Not Sure
All TV News	39.7%	44%	0	80.0%	66.7%
Market size					
1-25	31.0%	30%	5.0%	55.0%	76.7%
26-50	19.6%	20%	0	50.0%	75.8%
51-100	41.0%	44%	0	80.0%	50.0%
101-150	46.5%	48%	1.0%	75.0%	71.2%
151+	43.3%	47.5%	20.0%	60.0%	68.6%
Full-time staff					
51+	47.2%	46%	20.0%	80.0%	55.6%
31-50	40.9%	43%	0	65.0%	63.0%
21-30	46.1%	46.5%	20.0%	70.0%	72.1%
11-20	34.0%	37.5%	0	60.0%	75.8%
1-10	11.2%	5.0%	0	30.0%	65.0%

Affiliation					
ABC	48.7%	47.5%	20.0%	80.0%	74.6%
CBS	43.8%	47%	0	70.0%	63.6%
Fox	22.0%	20%	1.0%	55.0%	63.0%
NBC	47.7%	45%	25.0%	70.0%	61.0%
Big four affiliates	43.1%	45%	0	80.0%	66.2%
Other commercial	20.8%	17.5%	3.0%	45.0%	70.0%

The overall average percentage of revenues slipped slightly from 41 percent last year to 39.7 percent this year, although the median percentage rose from 40 percent to 44 percent. Note that network affiliate numbers rose slightly from 41.7 percent, but the percentage from independents plunged from last year's 35 percent.

Radio

Consolidation in radio has forced us to change our methodology in collecting data on radio news, and that makes comparisons with past years difficult to do. Today, 96.2 percent of all radio news departments handle news on more than one station. In fact, the average news department runs news on 3.16 stations; the median number of stations is 3. And that's just inside the market. More than four in 10 radio news departments (41.9 percent) say they do news for one or more stations outside their own market.

Radio Staff Size - 2003

	Avg. Full time	Median FT	Max FT	Avg Part time	Med PT	Max PT	Avg Total staff	Med Tot St	Max T S
All radio news	3.5	2.0	15	2.3	1.0	16	5.8	4.0	25
Market Size									
Major	6.1	5.0	14	2.8	1.5	12	8.9	7.5	16
Large	3.8	3.0	15	2.5	1.0	11	6.3	5.0	23
Medium	2.7	2.0	12	2.6	1.5	16	5.3	4.0	25
Small	3.1	2.0	12	1.9	1.0	8	5.0	4.0	20

While it appears that the average radio news staff has grown, that really reflects a change in methodology that looks at radio news departments rather than individual stations. What's taking place is that the average news department has grown, but consolidation has meant that the number of stations served by that news department has also grown. The bottom line is that while the typical radio news department is larger, the number of radio news people per station has continued to fall.

Average Minutes of Locally-Produced Radio News - 2003

	All radio	Major market	Large market	Medium market	Small market
Weekdays					
AM drive	24.2	40.8	32.0	19.9	22.5
Midday	8.3	12.7	5.1	8.0	10.1
PM drive	9.3	14.1	8.9	8.5	10.5
Night	2.5	7.0	3.7	2.0	1.3
Total weekday	44.3	74.6	49.7	38.4	44.4
Saturday					
AM drive	8.3	15.0	7.8	7.2	9.3
Midday	3.4	5.4	2.7	2.9	4.2
PM drive	2.0	4.7	2.6	1.1	2.4
Night	1.5	4.2	2.3	1.4	0.6
Total Saturday	15.2	29.3	15.4	12.6	16.5
Sunday					
AM drive	4.7	13.8	6.0	3.2	4.1
Midday	2.2	5.5	2.3	1.6	2.4
PM drive	1.7	4.7	2.4	1.0	1.5
Night	1.5	4.2	2.3	1.3	0.4
Total Sunday	10.1	28.2	13.0	7.1	8.4

Consolidation and the change in methodology make comparing this year's figures to last year's almost impossible. On the surface, it looks like the amount of radio news has gone up, but we're now calculating the amount of radio news produced by a news department—rather than the amount of news produced on a given station. Given the growth in the amount of stations served by a single news department, the amount of news on each station appears to have slipped from a year ago, but a precise comparison is not possible.

Number of Stations Where the Radio News Director Oversees the News – 2003

One	25.2%
Two	25.9%
Three	15.1%
Four	15.1%
Five	9.4%
Six	5.0%
Seven	3.6%
Eight	0.7%
Average	2.9
Median	2.0
Maximum	8

These figures are right in line with last year's numbers. While most stations operate with a centralized newsroom, sharing resources across stations, a number of those centralized operations consist of more than one news director, each handling responsibilities for one or more within the group.

What Else Radio News Directors Do – 2003

Announcing	23.7%
Sports	16.4%
Public Affairs	13.2%
Programming	9.9%
Production	9.9%
Operations	9.2%
Sales	8.6%
Other	9.2%

Overall, 77.8 percent of radio news directors say they handle other responsibilities at the station. That's about even with last year's 77.4 percent—and the first time in five years that the number hasn't jumped from the year before. Generally, the smaller the market, the more likely to see a news director with multiple responsibilities, but even in the major markets, over half (53.8 percent) say they handle other jobs.

Changes in Radio News, Staff and Budget in the last 12 months and planned for the future – 2003

	Increase	Same	Decrease	Note Sure
Total staff	13.7%	71.0%	14.5%	0.8%
Plan to change amount of staff next year	13.7%	73.3%	1.5%	11.5%
Amount of news	24.4%	66.4%	8.4%	0.8%
Plan to change amount of news next year	21.4%	71.8%	2.3%	4.5%
Change in news budget	18.5%	46.0%	9.7%	25.8%

As usual, "stayed the same" was the biggest winner in changes or planned changes in news, staff and budgets. There are few differences by market size, although major markets are more likely to have increased staff and are more likely to plan to increase staff. Overall, the figures are little changed from past years.

Radio News Profitability ... 1997 to 2003

	2003	2002	2001	2000	1999	1998	1997
Showing profit	25.2%	15.2%	17%	25%	19%	22%	23%
Breaking even	13.8%	13.9%	17%	15%	18%	14%	20%
Showing loss	2.4%	7.3%	0	7%	6%	6%	6%
Don't know	58.6%	63.6%	66%	53%	57%	58%	51%

This year was the first since 2000 that a quarter of the news departments report making a profit on news. Half of that growth came from the loss column a year ago, and half came from more news directors who said they knew the answer to the question.

Radio News Profitability by Market Size - 2003

	Showing profit	Breaking even	Showing loss	Don't know
Major market	41.7%	16.7%	0	41.6%
Large market	26.1%	21.7%	0	52.2%
Medium market	21.2%	13.5%	3.8%	61.5%
Small market	28.1%	9.4%	3.1%	59.4%

Major markets are those with 1 million or more listeners. Large markets are from 250,000 to 1 million. Medium markets are 50,000 to 250,000. Small markets are fewer than 50,000.

Daily Use of Digital Equipment and New Technology in Radio News – 2003

	Digital Audio recording	Digital editing and mixing	Digital or cellular phones	Field laptops for editing	MPEG Audio Layer 3	Internet research or email
All radio	78.1%	72.8%	72.8%	6.1%	37.7%	87.4%
Major market	84.6%	76.9%	92.3%	15.4%	23.1%	100.0%
Large market	82.6%	78.3%	91.3%	0	26.1%	82.6%
Medium market	72.9%	66.7%	58.3%	8.3%	43.8%	91.7%
Small market	81.5%	81.5%	74.1%	3.7%	48.1%	81.5%

Not surprisingly, the use of digital equipment grew in almost all categories for almost all technologies.

Percentage of News Material Gathered, Edited and Aired Digitally - 2003

	Percent of news gathered digitally	Percent of news material mixed and edited digitally	Percent of news material aired digitally
All Radio - Average	50.7%	72.2%	67.8%
All radio - median	50.0%	100.0%	100.0%
Major Market - average	59.6%	81.2%	89.6%
Major market – median	50.0%	100.0%	100.0%
Large Market - average	53.5%	74.0%	60.3%
Large market – median	45.0%	97.5%	97.5%
Medium market – average	48.7%	72.4%	66.9%
Medium market – median	50.0%	100.0%	100.0%
Small market – average	45.7%	62.9%	62.3%
Small market – median	50.0%	70.0%	77.5%

Virtually all categories rose from a year ago, with small markets making the biggest gains.

Percentage of TV News Departments Providing Content to Other Media – 2003

	Another TV Station	Cable TV Channel	Local Radio	Station Website
All TV	16.7%	16.3%	42.9%	70.6%
Big Four Affiliates	17.1%	17.6%	45.2%	75.2%
Other Commercial	30.0%	0	26.5%	26.5%
Market Size:				
1-25	22.6%	12.9%	38.7%	51.6%
26-50	16.7%	22.2%	41.7%	75.0%
51-100	23.8%	19.0%	47.6%	74.6%
101-150	9.2%	19.7%	46.1%	73.7%
151+	14.7%	0	32.4%	70.6%

These figures are little changed from a year ago.

TV News ... Contracts & Non-Competes

	2003	2002	2001	2000	1999
Percentage of TV News people Under Contract	51.8%	52.5%	50.2%	44.3%	42.2%
Percentage of TV News people Under Non-Compete	41.9%	46.5%	43.1%	36.9%	NA

More than half the people in TV news are under contract, but the percentage appears to be leveling off. That's mostly due to a drop in the percentage of off air people under contract. Most of those under contract also have non-competes. The drop in the total non-compete percentage probably reflects the small but growing number of states which have banned non-competes.

TV News ... Percentage Under Contract by Position

	2003	2002	2001	2000	1999
News Director	36%	37%	32%	32%	29%
Asst. News Director	46%	47%	31%	31%	27%
Executive Producer	41%	45%	55%	39%	42%
Managing Editor	41%	52%	54%	33%	27%
News Producer	56%	59%	57%	48%	40%
Assignment Editor	26%	32%	33%	26%	23%
News Anchor	85%	85%	78%	74%	75%
Weathercaster	83%	82%	76%	74%	66%
Sports Anchor	82%	80%	71%	71%	64%
News Reporter	70%	65%	60%	54%	53%
News Writer	8%	9%	21%	7%	11%
News Assistant	11%	5%	14%	5%	2%
Sports Reporter	48%	43%	48%	39%	38%
Photographer	9%	14%	17%	10%	11%
Tape Editor	3%	9%	11%	2%	3%
Graphics Specialist	8%	6%	8%	12%	9%
Internet Specialist	7%	17%	20%	12%	15%

After years of a steady rise in the percentage of TV news people under contract, the trend has shifted—at least for those off air. While on-air positions under contract held steady or grew, the percentage fell for almost all off air positions. Generally, smaller markets were more likely to place off air news people under contract. There was little difference by market size for on air news people. Almost all TV news people who are under contract have non-compete agreements—if state law allows.

Radio News ... Percentage Under Contract or Non-Compete - 2002

	Under Contract	Under Non-Compete
News Director	17%	53%
News Anchor	13%	80%
News Reporter	10%	60%
News Producer	9%	100%
Sports Anchor	9%	100%

Unlike the past, there's no consistent pattern—by market size, staff size or ownership--on the likelihood of radio news people being under contract. The percentage with non-competes applies just to those who are under contract.

When Do TV Stations Run Local News? Percentage of stations that run news at various times:

Time	Weekdays	Saturday	Sunday
4:30 am	1.2%	1.2%	0.8%
5:00 am	32.0%	0.4%	0.4%
5:30 am	53.1%	1.7%	1.7%
6:00 am	74.3%	4.6%	3.7%
6:30 am	71.8%	5.4%	4.1%
7:00 am	16.6%	11.2%	10.0%
7:30 am	15.4%	11.6%	9.5%
8:00 am	7.9%	9.5%	8.3%
8:30 am	7.5%	8.7%	7.5%
9:00 am	5.4%	5.8%	4.6%
9:30 am	2.9%	5.0%	4.1%
10:00 am	1.7%	2.5%	2.5%
10:30 am	1.7%	1.2%	2.1%
11:00 am	5.4%	0.8%	0.8%
11:30 am	7.5%	1.7%	0.8%
12:00 n	43.2%	2.5%	2.9%
12:30 pm	8.3%	1.7%	1.2%
1:00 pm	0.8%	0.8%	0.8%
1:30 pm	1.2%	1.2%	1.2%
2:00 pm	0.4%	0.8%	0.8%
2:30 pm	0.8%	0.8%	0.8%
3:00 pm	0.4%	0.4%	1.2%
3:30 pm	1.2%	1.2%	0.8%
4:00 pm	4.6%	0.4%	0.4%
4:30 pm	4.6%	0.8%	0.8%
5:00 pm	63.9%	6.2%	12.0%
5:30 pm	32.8%	7.5%	17.0%
6:00 pm	71.8%	56.4%	33.2%

6:30 pm	9.5%	5.8%	5.8%
7:00 pm	4.6%	2.1%	1.7%
7:30 pm	0.8%	1.7%	0.8%
8:00 pm	0.8%	0.4%	0.4%
8:30 pm	1.2%	1.2%	1.2%
9:00 pm	10.4%	7.5%	7.5%
9:30 pm	4.1%	2.9%	3.3%
10:00 pm	51.0%	44.4%	45.2%
10:30 pm	8.7%	4.1%	6.6%
11:00 pm	43.2%	37.8%	38.6%

We collect this detailed data every three years, and it shows significant growth in local news from 2000. For weekdays, 34 half hours showed more news in 2003 than in 2000 while only three went down and one stayed the same. Saturdays and Sundays had similar—although slightly smaller—growth in news. The biggest jumps came in weekday morning, with 5:00 am to 7:00 am all showing significant growth. 5:00 pm, 5:30 pm and 11:00 pm also rose. Other gains simply reflect the fact that stations are running news at more times than ever before. The weekend is a different story. While more stations ran news in most half hours of the days, the increases were generally very small.

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About the Survey

The RTNDA/Ball State University Survey was conducted in the fourth quarter of 2002 among all 1,421 operating, non-satellite television stations and a random sample of 1,490 radio stations. Valid responses came from 890 television stations (62.6 percent) and 272 radio news directors and general managers representing 445 radio stations.