

A Tangled Web

By Bob Papper

The latest RTNDA/Ball State University Survey shows more station web sites than ever before and more people staffing them. But the growth isn't across the board; for both television and radio, it's mostly new web sites by smaller stations playing catch-up with their larger counterparts.

Overall, there was significant growth in web staff, but that follows a year with significant cutbacks. The net result is the largest staff ever, but only slightly bigger than two years ago. That's probably why all that staff growth hasn't resulted in more complex web sites—with more streaming audio, video, still images and so on.

And few stations are making money on the web, so, for most stations, the web remains an investment in the future.

Who Has Web Sites?

| | | | |
|-------------|-------|-------------|-------|
| All TV | 94.0% | All Radio | 82.7% |
| Market Size | | Market Size | |
| 1-25 | 93.5 | Major | 90.0 |
| 26-50 | 93.5 | Large | 88.0 |
| 51 – 100 | 96.8 | Medium | 83.3 |
| 101-150 | 93.4 | Small | 76.3 |
| 151+ | 91.2 | | |

Overall, the percentage of television web sites rose from last year's 91.3 percent to this year's 94 percent. Most of the gain came in the smallest markets, which rose from last year's 83 percent to nearly rival the larger markets. Commercial stations not affiliated with one of the big four networks and PBS affiliates lagged behind the others, and the West lagged behind the rest of the country. The percentage of radio stations with web sites soared from last year's 67.7 percent to this year's 82.7 percent. But the growth occurred solely in large, medium and small markets—with the smallest markets showing the biggest percentage gains. There were no meaningful differences between AM and FM stations or station staff size. But stations that were part of a market cluster of three or more and group-owned stations were noticeably more likely to have web sites. There were no big differences geographically, although stations in the Northeast were a little more likely to have web sites, and stations in the West a little less likely.

How Many Web Sites Include News?

| | | | |
|-------------|-------|-------------|-------|
| All TV | 88.4% | All Radio | 41.7% |
| Market Size | | Market Size | |
| 1-25 | 80.6 | Major | 50.0 |
| 26-50 | 83.3 | Large | 44.0 |
| 51-100 | 93.7 | Medium | 39.5 |
| 101-150 | 89.5 | Small | 42.1 |
| 151+ | 88.6 | | |

Television actually slipped from last year's 93.4 percent overall percentage, and that drop ran across all but one (markets 51-100) of the market groups. Some of that drop might reflect a retrenchment during the recession, but it's also possible that many of the new station web sites simply went into place without local news – thus dropping the percentage in this table. Radio rose from last year's 31.7 percent—with similar gains posted in every market size. Here, AM stations were considerably more likely to have local news on their web site, probably reflecting the comparatively large number of news and news/talk stations on AM.

How Many Are on the Web Staff?

| | Full-time | Part-time | Total |
|-----------------|-----------|-----------|-------|
| All TV | 1.37 | 1.32 | 2.69 |
| Markets 1-25 | 2.68 | 0.76 | 3.44 |
| Markets 26-50 | 1.27 | 0.68 | 1.95 |
| Markets 51-100 | 0.87 | 1.19 | 2.06 |
| Markets 101-150 | 1.35 | 1.65 | 3.00 |
| Markets 151+ | 1.15 | 1.92 | 3.07 |
| All Radio | 1.48 | 0.60 | 2.08 |
| Major Market | 2.67 | 1.50 | 4.17 |
| Large Market | 2.82 | 0.14 | 2.96 |
| Medium Market | 1.16 | 0.50 | 1.66 |
| Small Market | 0.62 | 0.77 | 1.39 |

Perhaps reflecting a stronger economy or simply greater faith or attention to the Internet, web staff clearly rose this year. Other than markets 26-50 (which might just be an anomaly), web staffing rose between a half and a full person at the typical television station. When we look at newsrooms by staff size, we see every size—even the smallest—increased web staffing in the last year. Radio web staffing showed a similar pattern, increasing overall by about half a person. While three of the four market sizes rose from last year (medium markets were the exception), the big growth came in major markets. All radio categories grew, including AM and FM, all staff sizes, group or independent, and all geographic regions. For both radio and TV, this year's growth follows last year's layoffs (and unfilled vacancies). The net result is web staffing at slightly higher levels than two years ago.

Do Other Staffers Help on the Web?

| | |
|-----------------|-------|
| All TV | 28.9% |
| Markets 1-25 | 23.5 |
| Markets 26-50 | 22.0 |
| Markets 51-100 | 27.5 |
| Markets 101-150 | 29.0 |
| Markets 151+ | 40.6 |
| All Radio | 64.4% |
| Major Market | 75.7 |
| Large Market | 81.3 |
| Medium Market | 60.7 |
| Small Market | 49.1 |

That increased web staff didn't replace more help from other staffers. Television rose 7.8 points from last year—led by a whopping increase of over 16 points in the smallest markets. But every market size went up. Overall, 40.6 percent of news directors say that their newsroom staff simply makes the product available for the web, but that others do the work. In radio, staff participation in the web skyrocketed from less than half (47.4 percent) last year to nearly two-thirds (64.4 percent) this year. Interestingly, it soared in all categories except the smallest stations, which were unchanged from a year ago.

Elements of Local News Web Sites

| TV | Text | Images | Audio | Video |
|-----------------|-------|--------|-------|-------|
| All TV: | 98.1% | 72.3% | 27.2% | 35.2% |
| Markets 1-25 | 96.0 | 76.0 | 24.0 | 40.0 |
| Markets 26-50 | 100.0 | 76.7 | 33.3 | 43.3 |
| Markets 51-100 | 96.6 | 76.3 | 28.8 | 37.3 |
| Markets 101-150 | 100.0 | 75.0 | 29.4 | 35.3 |
| Markets 151+ | 96.8 | 51.6 | 16.1 | 19.4 |

| Radio | Text | Images | Audio | Streaming Audio | Live Cams | Video |
|---------------|-------|--------|-------|-----------------|-----------|-------|
| All Radio: | 94.5% | 29.4% | 15.6% | 3.7% | 2.8% | 0 |
| Major Market | 100.0 | 30.0 | 30.0 | 20.0 | 0 | 0 |
| Large Market | 100.0 | 36.4 | 27.3 | 0 | 13.6 | 0 |
| Medium Market | 95.2 | 19.0 | 9.5 | 4.8 | 0 | 0 |
| Small Market | 87.5 | 40.6 | 12.5 | 0 | 0 | 0 |

Web site complexity in television appears largely stagnant, but that really doesn't tell the story of what happened in the last year. Last year, there was a big drop-off in web site complexity after market 100; this year, the drop-off comes after

market 150. On the other hand, the larger markets (1-100) were as likely to scale back the complexity of their web sites as they were to increase them. Radio web sites edged up slightly in complexity, but all of the gains were in major and large markets. If anything, medium and small markets scaled back.

Anybody Making Money?

| | Profit | Breaking Even | Loss | Don't Know |
|-----------------|--------|---------------|-------|------------|
| All TV | 12.8% | 18.3% | 24.8% | 44.1% |
| Markets 1-25 | 11.1 | 0.0 | 14.8 | 74.1 |
| Markets 26-50 | 7.4 | 14.8 | 25.9 | 51.9 |
| Markets 51-100 | 18.6 | 20.3 | 23.7 | 37.4 |
| Markets 101-150 | 9.6 | 23.3 | 27.4 | 39.7 |
| Markets 151+ | 15.6 | 21.9 | 28.1 | 34.4 |
| All Radio | 4.7% | 4.7% | 7.5% | 83.1% |
| Major Market | 16.7 | 8.3 | 0 | 75.0 |
| Large Market | 0 | 5.0 | 15.0 | 80.0 |
| Medium Market | 0 | 0 | 0 | 100.0 |
| Small Market | 10.3 | 10.3 | 17.2 | 62.2 |

Television web site profitability rose from last year's 9.7 percent to this year's 12.8 percent. Otherwise, there was little change. Breaking even dropped a hair and Loss fell slightly. But the numbers by market size, staff size, affiliation and geography bounce up and down, suggesting little in the way of profitability trends. Radio web site profitability fell from last year's meager 7.8 percent, but so few radio news directors know about the web site profitability that the numbers should be viewed with caution.

News Director Role with Web Site

| | In Charge | In Charge of News Content Only | No Management Role | Other |
|-----------------|-----------|--------------------------------|--------------------|-------|
| All TV | 23.7% | 58.9% | 16.5% | 0.9% |
| Markets 1-25 | 17.2 | 58.6 | 24.2 | 0 |
| Markets 26-50 | 9.7 | 58.1 | 29.0 | 3.2 |
| Markets 51-100 | 18.6 | 64.4 | 17.0 | 0 |
| Markets 101-150 | 32.4 | 56.3 | 9.9 | 1.4 |
| Markets 151+ | 32.4 | 55.8 | 11.8 | 0 |
| All Radio | 20.0% | 59.0% | 21.0% | |
| Major Market | 20.0 | 70.0 | 10.0 | |

| | | | | |
|---------------|------|------|------|--|
| Large Market | 0 | 90.0 | 10.0 | |
| Medium Market | 18.6 | 58.1 | 23.3 | |
| Small Market | 37.9 | 41.4 | 20.7 | |

It could be either growing authority or growing work load, but in either case, television news directors were clearly more likely to be in charge overall and/or in charge of the news on station web sites. In almost every market size, both categories rose noticeably from a year ago. Radio was virtually unchanged in every category.

What Do Users Want From Your Site?

| Rank | All TV This Year | All TV Last Year | All Radio This Year | All Radio Last Year |
|------|--------------------|--------------------|---------------------|---------------------|
| 1 | Local weather | Local weather | Local news | Local sports |
| 2 | Local news | Local news | Live cameras | Local weather |
| 3 | Other information | Local sports | Money | Talent bios |
| 4 | Money | National news | Local weather | Local news |
| 5 | Headlines | Health | National news | Entertainment News |
| 6 | Food | Talent bios | Other information | National news |
| 7 | Live cameras | Food | Local sports | Other info |
| 8 | Weather elsewhere | Weather elsewhere | International news | Headlines |
| 9 | National news | Traffic | Traffic | International news |
| 10 | Local sports | Money | Entertainment news | Traffic |
| 11 | Entertainment news | Education | Weather elsewhere | Sports elsewhere |
| 12 | Health | Sports elsewhere | Food | Weather elsewhere |
| 13 | Consumer news | Entertainment News | Sports elsewhere | Consumer news |
| 14 | Traffic | International news | Consumer news | Education |
| 15 | Talent bios | Headlines | Education | Food |
| 16 | Education | Other info | Talent bios | Money |
| 17 | Sports elsewhere | Live cameras | Health | Health |
| 18 | International | Consumer news | Headlines | Live cameras |

| | | | | |
|--|------|--|--|--|
| | news | | | |
|--|------|--|--|--|

In television, local weather and local news (in that order) remain on top of the charts. Almost everything else bounced around. There were big jumps in Other information, Money and Live cameras ... and big drops in Local sports, Health and Talent bios. In radio, there were big jumps in Live cameras and Money and a smaller jump in Local news. Heading down: Talent bios and Headlines. Note that both radio and television saw big jumps in Live cameras and Money. The former probably reflects a novelty on the web and the latter probably reflects concern over the economy.

Bob Papper is professor of telecommunications at Ball State University and has worked extensively in radio and TV news. Data entry and tabulation were done by the Bureau of Business Research at Ball State. This research was supported by the Department of Telecommunications at Ball State University and the Radio Television News Directors Association.

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.