

Web Holding Pattern  
By Bob Papper

The latest RTNDA/Ball State University Survey shows little change among station web sites from a year ago — for both radio and television. About the same number of stations have web sites, and about the same number include local news. There’s also little change in web site complexity or staffing. If we were in stronger economic times, that might reflect a maturing of station web sites. We’re not, few stations report making money on the web, so it’s more likely that station web sites remain in a holding pattern, largely an investment for the future.

Who Has Web Sites?

All TV	93.8%	All Radio	79.4%
Market Size		Market Size	
1-25	86.5	Major	86.8
26-50	100.0	Large	80.6
51 – 100	95.8	Medium	83.7
101-150	92.3	Small	67.0
151+	94.9		

Overall, the numbers in both television and radio have largely stabilized with TV essentially exactly where it was a year ago and radio down very slightly. In television, almost all categories of stations are in the mid 90 percentile range except the stations with the smallest staffs (1-10 employees) at 78.9 percent and non-network commercial stations at 57.9 percent. Small independents are most commonly found in the largest markets, which accounts for the lower percentage for stations in the biggest markets. In radio, the larger the staff, the more likely a station is to have a web site; and the more stations owned in the same market, the more likely a station is to have a website.

How Many Web Sites Include News?

All TV	94.7%	All Radio	41.5%
Market Size		Market Size	
1-25	90.9	Major	45.7
26-50	97.1	Large	31.0
51-100	97.1	Medium	40.9
101-150	93.1	Small	44.6
151+	94.4		

Television rose slightly in the percentage of stations that include local news on their web site (back to just over the 2002 level) while radio remained unchanged.

Again, in television, those stations with staffs of just 1-10 people are least likely to include local news (64.3 percent); all others groups are over 90 percent. In radio, the larger the staff, the more likely to include local news, but there's no relationship between the number of stations owned in a market and the likelihood of including local news on the web.

#### How Many Are on the Web Staff?

	Full-time	Part-time	Total
All TV	1.25	1.42	2.67
Markets 1-25	1.52	0.64	2.16
Markets 26-50	0.94	1.06	2.00
Markets 51-100	0.93	1.41	2.34
Markets 101-150	1.85	1.33	3.18
Markets 151+	0.76	2.62	3.38
All Radio	1.45	0.72	2.17
Major Market	2.10	1.40	3.50
Large Market	1.29	0.86	2.15
Medium Market	1.44	0.78	2.22
Small Market	1.20	0.25	1.45

Stations reported that they increased web staff this past year, but the numbers don't bear that out. The staff size reported this year is almost identical — for both radio and television — to the staff size we reported a year ago. Perhaps that perception simply reflects renewed attention to the website. Web staffs rose noticeably last year, so the disconnect on staff growth could simply be a timing misperception. Note that while it's fueled heavily by part timers, generally, the *smaller* the television station, the larger the web staff. In television, the smallest web staffs were at stations with the smallest staffs and at Fox affiliates.

#### Do Other Staffers Help on the Web?

All TV	30.5%
Markets 1-25	24.8
Markets 26-50	17.4
Markets 51-100	32.3
Markets 101-150	31.5
Markets 151+	42.3
All Radio	66.8%
Major Market	82.0
Large Market	46.0
Medium Market	71.9

Small Market	62.8
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After huge increases in this category a year ago, the numbers are little changed this time around. Almost all the numbers are higher – for both radio and television — but they’re up only slightly (generally less than 2 percent) from a year ago. Overall, 55.0 percent of television news directors and 44.2 percent of radio news directors say that their newsroom staff simply makes the product available for the web, but that others do the work.

### Elements of Local News Web Sites

TV	Text	Images	Audio	Video
All TV:	92.6%	68.2%	34.3%	41.3%
Markets 1-25	90.3	64.5	51.6	58.1
Markets 26-50	97.1	67.6	44.1	55.9
Markets 51-100	95.5	79.1	43.3	46.3
Markets 101-150	90.3	68.1	26.4	36.1
Markets 151+	89.5	52.6	10.5	15.8

Radio	Text	News Pictures	Audio	Streaming Audio	Live Cams	Video
All Radio:	91.1%	24.1%	19.0%	9.6%	12.7%	0
Major Market	91.7	33.3	50.0	9.1	16.7	0
Large Market	87.5	12.5	0	14.3	0	0
Medium Market	91.7	19.4	19.4	12.1	13.9	0
Small Market	91.3	30.4	8.7	4.5	13.0	0

There are few consistent trends in web site complexity. In television, the use of text and images changed little from last year, although both dropped slightly. But the use of audio and video both increased. Stations with smaller staffs were less likely to have complex web sites, and Fox affiliates were less likely to use pictures, audio or video. Radio was little changed, although audio streaming became a little more widespread, and there was a sizeable jump (from 2.8 percent to 12.7 percent) in radio stations using live cameras.

### Anybody Making Money?

	Profit	Breaking Even	Loss	Don't Know
All TV	14.1%	18.4%	20.1%	47.4%
Markets 1-25	10.7	17.9	10.7	60.7
Markets 26-50	14.7	14.7	14.7	55.9
Markets 51-100	16.9	15.4	24.6	43.1
Markets 101-150	15.5	22.5	21.1	40.8
Markets 151+	8.3	19.4	22.2	50.0
All Radio	3.8%	9.0%	9.0%	78.2%

Major Market	0	0	16.7	83.3
Large Market	14.3	14.3	0	71.4
Medium Market	0	11.1	5.6	83.3
Small Market	8.7	8.7	13.0	69.6

Television edged up, as the stations reporting making a profit on the web rose from 12.8 percent to 14.1 percent, stations reporting a loss dropped from 24.8 percent to 20.1 percent and break even remained the same. Radio edged downward, with the percentage of stations reporting a profit dropping by just under 1 percent and those reporting a loss increasing by just over 1 percent. No TV station with a staff of 1-10 reported making a profit on the web, but few of those news directors knew one way or the other. Otherwise, there was no consistent pattern. No Fox affiliate reported making a profit on the web, and CBS affiliates were half as likely as ABC and NBC affiliates to report a profit. But the percentage reporting losses was just about identical.

#### News Director Role with Web Site

	In Charge	In Charge of News Content Only	No Management Role/Other
All TV	22.0%	63.5%	14.5%
Markets 1-25	18.8	65.6	15.6
Markets 26-50	14.7	76.5	8.8
Markets 51-100	19.4	64.2	16.4
Markets 101-150	26.4	59.7	13.9
Markets 151+	27.8	55.6	16.7
All Radio	16.3%	58.7%	25.0%
Major Market	6.7	53.3	40.0
Large Market	12.5	75.0	12.5
Medium Market	16.3	62.8	20.9
Small Market	23.1	50.0	26.9

Most of these numbers are little changed from a year ago. The smaller the news staff, the less likely the news director to be in charge of the website. Fox affiliate news directors are only a third as likely to be in charge as news directors with other network affiliates, and Fox news directors are more likely to have no management role at all in the station website. In radio, the bigger the market, the less likely the news director to be in charge of the web site.

#### What Do Users Want From Your Site?

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

For half of the list, the most popular areas in television are within one position of the most popular areas in radio. For the third year in a row, television has local weather and local news in positions one and two, respectively. This is the second year in a row that local news has been on top in radio. In TV, moving up: health, traffic, weather elsewhere, local sports and education. Moving down: other information, food, national news, entertainment news and money. In radio, heading up: local weather, other information, traffic, weather elsewhere, entertainment news, health, talent bios and headlines. Heading down: live cameras, national news, sports elsewhere, consumer news and money. Note that *money* plunged from the top four in both radio and TV last year to the bottom two this year.

#### TV Station Website Traffic During the Past 30 Days

	Hits (in millions)	Page Views (in millions)	Unique Visitors (in thousands)

All TV	3.21	2.58	318.16
Market Size			
1-25	0.65	1.23	171.53
26-50	1.73	4.93	251.29
51-100	2.58	3.92	173.60
101-150	7.29	1.35	634.53
151+	0.41	0.22	62.99

We have been asking news directors about website traffic for the past several years, but this is the first time we've had enough response to feel at all comfortable publishing the numbers. Even so, accept the numbers here with some caution. Not all news directors understand the definitions of hits and page views, and some people (erroneously) use the terms interchangeably. Hits refers to the number of elements on web sites that someone comes in contact with. The page itself constitutes a hit and so does every graphic element on the page. Consequently, a station home page could result in dozens of hits — just for that one page. Page views refers to the number of pages that are fully loaded (regardless of the number of elements on the page). Consequently, the number of hits (a term used less and less frequently to measure web activity) should be far greater than the more common measure of page views.

***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 2003 among all 1,295 operating, non-satellite television stations and a random sample of 1,482 radio stations. Valid responses came from 838 television stations (64.7 percent) and 133 radio news directors and general managers representing 437 radio stations.