

Moving Forward Again By Bob Papper

The latest RTNDA/Ball State University Survey shows the first meaningful changes in web site numbers in the last three years. Probably resulting from an improved economy and maybe even greater credibility on the part of news and station management, station web sites have grown in complexity and content and, in the case of television, even staffing.

Who Has Web Sites?

| | | | |
|-------------|-------|-------------|-------|
| All TV | 97.8% | All Radio | 87.6% |
| Market Size | | Market Size | |
| 1 - 25 | 94.6 | Major | 100.0 |
| 26 - 50 | 97.9 | Large | 89.5 |
| 51 - 100 | 100.0 | Medium | 90.9 |
| 101 - 150 | 96.8 | Small | 78.1 |
| 151+ | 98.0 | | |

Both television and radio moved up from a year ago. TV rose by 4 percent and radio by more than 8. In television, station web sites are now virtually universal with radio headed that way except in the smallest markets. Even there, the numbers are starting to catch up. In TV, there are no meaningful differences by market size, staff size, affiliation or geographic region. All radio categories rose. Group owned stations were a little more likely to have web sites than independents, and noncommercial stations were a little more likely to have web sites than commercial ones.

How Many Web Sites Include News?

| | | | |
|-------------|-------|-------------|-------|
| All TV | 94.0% | All Radio | 76.5% |
| Market Size | | Market Size | |
| 1 - 25 | 94.3 | Major | 76.9 |
| 26 - 50 | 95.7 | Large | 76.5 |
| 51 - 100 | 93.4 | Medium | 66.7 |
| 101 - 150 | 93.3 | Small | 88.0 |
| 151+ | 93.9 | | |

The big change here is in radio. Television web sites are just as likely to have news as a year ago, and just about the only hold-outs are stations with the smallest news staffs. This year's radio figures represent a huge jump from last year's 41.5 percent to this year's 76.5 percent. All market sizes increased, and there was no difference between group owned or independent stations.

Elements of Local News Web Sites

| TV | Text | Still Pictures | Audio | Streaming Audio | Live Camera | Video |
|-------------------|-------|----------------|-------|-----------------|-------------|-------|
| All TV: | 96.4% | 70.9% | 35.1% | 36.7% | 27.5% | 38.6% |
| Markets 1 - 25 | 100.0 | 75.8 | 48.5 | 54.5 | 27.3 | 45.5 |
| Markets 26 - 50 | 93.3 | 73.3 | 51.1 | 42.2 | 46.7 | 53.3 |
| Markets 51 - 100 | 94.4 | 77.5 | 35.2 | 33.8 | 28.2 | 33.8 |
| Markets 101 - 150 | 100.0 | 64.3 | 21.4 | 26.8 | 21.4 | 32.1 |
| Markets 151+ | 95.7 | 63.0 | 26.1 | 34.8 | 15.2 | 34.8 |

| Radio | Text | Still Pictures | Audio | Streaming Audio | Live Cameras | Video |
|---------------|-------|----------------|-------|-----------------|--------------|-------|
| All Radio: | 96.0% | 36.9% | 26.2% | 32.3% | 1.5% | 4.6% |
| Major Market | 100.0 | 60.0 | 70.0 | 70.0 | 10.0 | 10.0% |
| Large Market | 92.3 | 30.8 | 30.8 | 30.8 | 0 | 0 |
| Medium Market | 95.0 | 45.0 | 25.0 | 30.0 | 0 | 5.0 |
| Small Market | 90.9 | 22.7 | 4.5 | 18.2 | 0 | 4.5 |

We asked about more potential web elements this year than ever before, and both television and radio web sites were more likely to have more different elements than ever before. Not surprisingly, the largest stations were likely to have the most complex web sites, but the biggest growth this year was in the smaller markets. Again, stations with the smallest staffs tended to have simpler web sites. In TV, there were no meaningful differences based on affiliation or geography. There was significant growth in radio web site complexity, with big jumps in still pictures and audio and a huge jump in streaming audio.

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 news |
| 2 | Local news | Local news | Local weather | Local weather |
| 3 | Headlines | Health | Local sports | Other information |
| 4 | Local sports | Traffic | Other information | Live cameras |
| 5 | Weather elsewhere | Weather elsewhere | Talent bios | Traffic |
| 6 | Health | Headlines | National news | Weather elsewhere |
| 7 | Education | Live cameras | Entertainment news | Entertainment news |
| 8 | Traffic | Local sports | Headlines | Local sports |
| 9 | National news | Education | International news | International news |
| 10 | Other | Other | Sports elsewhere | Food |

| | | | | |
|----|--------------------|--------------------|-------------------|------------------|
| | information | information | | |
| 11 | Talent bios | Food | Traffic | Health |
| 12 | Entertainment news | Consumer news | Money | Talent bios |
| 13 | Sports elsewhere | National news | Food | Headlines |
| 14 | Food | Entertainment news | Weather elsewhere | National news |
| 15 | Live cameras | Talent bios | Health | Education |
| 16 | Consumer news | Sports elsewhere | Education | Sports elsewhere |
| 17 | International news | Money | Live cameras | Consumer news |
| 18 | Money | International news | Consumer news | Money |

It's the fourth year in a row in TV with local weather and local news in that order at the top of the list. Headlines, which has always been in the top group, moved up to number 3. Local sports has moved up steadily from 10 to 8 to number 4. Edging up this year in TV: Education, National news and Talent bios. Edging down in TV: Health, Traffic and Food. For the third year in a row in radio, Local news and Local weather are one and two, respectively. Local sports moved up to the number 3 slot. Talent bios have moved up from 16 two years ago to 12 last year and 5 this year. National news also soared, but it was also high two years ago in the last election cycle. Other increases in radio: Headlines, Sports elsewhere and Money. Heading down in radio: Traffic, Food, Weather elsewhere, Health and Live Cameras.

How Many People Work on the Web?

| | Full-time | Part-time | Total |
|-----------------|-----------|-----------|-------|
| All TV | 1.45 | 1.71 | 3.16 |
| Markets 1-25 | 2.50 | 0.42 | 2.92 |
| Markets 26-50 | 1.32 | 1.51 | 2.84 |
| Markets 51-100 | 0.96 | 1.91 | 2.88 |
| Markets 101-150 | 0.86 | 1.65 | 2.51 |
| Markets 151+ | 2.27 | 2.64 | 4.91 |
| | | | |
| All Radio | 1.11 | 1.04 | 2.15 |
| Major Market | 1.36 | 0.55 | 1.91 |
| Large Market | 1.07 | 1.60 | 2.67 |
| Medium Market | 0.96 | 1.04 | 2.00 |
| Small Market | 1.21 | 0.87 | 2.08 |

In television, stations added about half a person to the typical web site staff in the past year – evenly split between full time and part time. Stations in the South had the largest full time staffs, and stations in the Midwest had more part-timers. Radio web staffing remained unchanged from a year ago. There were no staff differences based on whether the station was part of a group or independent.

Do Other Staffers Help on the Web?

| | |
|-----------------|-------|
| All TV | 32.5% |
| Markets 1-25 | 20.6 |
| Markets 26-50 | 20.1 |
| Markets 51-100 | 32.0 |
| Markets 101-150 | 44.1 |
| Markets 151+ | 39.5 |
| | |
| All Radio | 51.5% |
| Major Market | 31.9 |
| Large Market | 52.5 |
| Medium Market | 52.1 |
| Small Market | 62.4 |

Overall, the numbers in TV edged up 2 percent from last year, but, overall, almost two-thirds (64.9 percent) of TV news directors say their staff just makes the news available to the web site – rather than working on the site itself. Not surprisingly, stations in the largest markets were less likely to have the staff share web responsibilities and more likely to have the staff just make the material available. In radio, the percentage of news staffers working on the web dropped noticeably from the last few years. It had been stable at around two-thirds. Overall, 22.4 percent of radio news directors say the staff just makes the news content available for the web – more commonly in the larger markets.

News Director Role with Web Site

| | In Charge | In Charge of News Content Only | No Management Role/Other |
|-----------------|-----------|--------------------------------|--------------------------|
| All TV | 15.6% | 53.2% | 31.2% |
| Markets 1-25 | 18.2 | 45.5 | 36.3 |
| Markets 26-50 | 4.4 | 60.0 | 35.6 |
| Markets 51-100 | 16.9 | 50.7 | 32.4 |
| Markets 101-150 | 14.5 | 52.7 | 32.7 |
| Markets 151+ | 23.9 | 56.5 | 19.5 |
| | | | |
| All Radio | 13.1% | 54.8% | 32.2% |

| | | | |
|---------------|------|------|------|
| Major Market | 15.4 | 53.8 | 30.8 |
| Large Market | 5.9 | 64.7 | 29.4 |
| Medium Market | 10.0 | 46.7 | 43.3 |
| Small Market | 20.8 | 58.3 | 20.8 |

These numbers have changed little in the past, but there's sizeable movement this year. While a majority of TV news directors are in charge of the news content on their web site, the percentage is down 10 percent from a year ago. At the same time, news directors are less likely to be in charge overall -- down noticeably from a year ago -- and more than twice as likely to have no management role at all. Although the change is more pronounced in larger markets, the change is present across the board. There is a similar although less pronounced shift in radio as well. Radio news directors at independent stations are a little more likely to oversee the station web site and the news on the web than news directors at group owned stations.

TV Station Website Traffic During the Past 30 Days

| | Hits (in millions) | Page Views (in millions) | Unique Visitors (in thousands) |
|-------------|--------------------|--------------------------|--------------------------------|
| All TV | 2.3 | 6.1 | 206.8 |
| Market Size | | | |
| 1-25 | 6.7 | 22.2 | 476.8 |
| 26-50 | 5.4 | 7.7 | 325.5 |
| 51-100 | 1.2 | 1.4 | 116.6 |
| 101-150 | 1.8 | 0.6 | 77.0 |
| 151+ | 0.7 | 0.2 | 30.1 |

Each year we ask about web traffic, and each year more television news directors are able to tell us. Overall, the numbers are up -- sometimes by a huge amount, especially in the largest markets. Still, the number of news directors reporting this data is well below other parts of the survey, so view these figures with some caution. 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. It isn't here because most news directors either responded with hits or page views but not both. Too few radio news directors responded to this question to be able to report the results.

Anybody Making Money?

| | Profit | Breaking Even | Loss | Don't Know |
|-----------------|--------|---------------|-------|------------|
| All TV | 15.1% | 20.2% | 17.2% | 47.5% |
| Markets 1-25 | 23.3 | 13.3 | 13.3 | 50.0 |
| Markets 26-50 | 21.4 | 21.4 | 7.1 | 50.0 |
| Markets 51-100 | 13.2 | 26.5 | 26.5 | 33.8 |
| Markets 101-150 | 10.9 | 14.5 | 21.8 | 52.7 |
| Markets 151+ | 11.6 | 20.9 | 9.3 | 58.1 |
| | | | | |
| All Radio | 4.7% | 5.9% | 10.6% | 78.8% |
| Major Market | 0 | 0 | 15.4 | 84.6 |
| Large Market | 11.8 | 11.8 | 0 | 76.5 |
| Medium Market | 3.3 | 10.0 | 16.7 | 70.0 |
| Small Market | 4.0 | 0 | 8.0 | 88.0 |

It's not a major shift, but the percentage of TV stations making money on the web edged up a percent from a year ago; the percentage breaking even rose 2 percent; and the percentage showing a loss dropped by 3 percent. The positive moves are all in the larger markets. Fox stations were by far the least likely to make a profit, but Fox news directors were also far less likely than others to know whether the web site made a profit. Web sites in the Northeast and Midwest were more likely to make a profit than sites in the South or West. Radio, on the other hand, didn't move in any meaningful way. There was a very slight increase in the stations reporting a profit, a 3 percent drop in breaking even, and no change in loss. Overall, TV web sites are continuing to edge upward, and radio web sites are continuing to stay flat. The result is a widening gap in the profit picture between television and radio web sites.

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 2004 among all 1,624 operating, non-satellite television stations and a random sample of 1,509 radio stations. Valid responses came from 1,223 television stations (75.3 percent) and 103 radio news directors and general managers representing 417 radio stations.