

News, Staff & Profit ... Mixed Messages

by Bob Papper

Overall, the past year was a strong one for the amount of both news and staff, but there are a number of cautionary signs in the latest RTNDA/Ball State University Survey.

The total amount of local TV news time per week remains at record levels.

Staffing grew slightly again, although it's still below the peak of 2000.

Generally, the biggest television stations got bigger, but the picture was mixed for many others.

Even as staffing rose to its second highest level ever, fewer TV news directors expect to see more news or more staff in the coming year. There was also a big drop in news profitability – although only a small decrease in the percentage of revenue that news brings in to the typical station.

The total number of TV stations originating local news rose to 778. That's four more than last year. Despite the attention given to stations that drop local news, there has actually been a net increase every year we've tracked the number. Another 81 stations get local news from one of the 778. That's up 13 from a year ago.

Consolidation in radio and the accompanying changes in the survey to accommodate that consolidation make it difficult to track what's going on in radio news over time. After a drop last year, staffing and news numbers returned to nearly the levels of two years ago. Part of the problem in attempting to compare the data is that, every year, radio news directors oversee the news on more and more stations. This year, the typical radio news director oversaw four stations – that's up a full station from a year ago.

TV Staff Size – 2005

	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	35.0	30.0	155	4.8	3.0	105	39.8	34.0	175
Big four affiliates	37.3	31.0	155	5.0	3.0	105	42.4	36.0	175
Other commercial	34.3	28.5	100	4.6	3.5	22	38.9	33.5	100
Market size:									
1-25	56.6	56.0	155	8.7	7.0	34	65.3	64.0	175
26-50	51.2	51.5	120	5.4	4.0	21	56.6	59.0	125
51-100	36.6	36.0	100	4.2	3.0	21	40.8	42.0	100
101-150	24.0	26.0	43	4.6	1.5	105	28.7	28.5	120
151+	17.7	20.0	48	2.8	2.0	12	20.5	21.5	58

The median staff size in TV news stayed the same as a year ago, but the average rose by 3.1 percent. That's the second-highest staffing level ever. Employment growth was inconsistent across markets, going up slightly in markets 1-25, 101-150 and 150+ but dropping a fraction in markets 26-50 and 51-100. Mostly the big got a little bigger, with only very minor changes outside the top 25 markets. That's why the average rose, but the median stayed the same. The use of part-timers jumped a year ago but held steady this time around. Historically, Fox-affiliated newsrooms have been smaller than other network affiliates, but the difference is now insignificant. Newsrooms in the Northeast tend to be bigger, and newsrooms in the West tend to be smaller.

Staff Size Changes ... the past year

	Increase	Decrease	Same	Don't Know
All TV news	29.2%	18.8%	41.3%	10.7%
Big four affiliates	33.2	18.5	41.2	7.1
Other commercial	8.6	25.7	28.6	37.1

Overall, two-thirds of TV news staffs increased or remained the same. But the gap between increased and decreased narrowed this past year as the percentage increasing went down (13.8 percent) and the percentage decreasing rose (16.0 percent). News departments at CBS, Fox and NBC affiliates were most likely to grow. News

departments at ABC stations were most likely to hold even, and non-network affiliates commonly downsized.

Planned Staff Changes ... the next year

	Increase	Decrease	Same	Not sure
All TV news	22.3%	10.3%	48.0%	19.4%
Big four affiliates	23.5	8.9	53.5	14.1
Other commercial	5.7	22.9	17.1	54.3

Almost half the stations expect to hold staff steady with twice as many of the rest expecting an increase as expecting a decrease. That's the good news. These numbers don't usually change much from year to year, but that's not true this time around. The percentage of planned staff increases is down 28.3 percent from a year ago while planned staff decreases are more than double a year ago. The bigger the market, the more likely to expect planned growth. NBC affiliates were half as likely to expect growth and twice as likely to expect a decrease. Stations in the West tend to expect more growth than stations elsewhere, but stations in the West have tended to lag behind other regions in staff size.

Hours of Local TV News per Day – 2005

	Average weekday	Weekday maximum	Average Saturday	Saturday maximum	Average Sunday	Sunday maximum
All TV news	3.6	20.0	1.4	20.0	1.4	20.0
Big four affiliates	3.8	20.0	1.5	20.0	1.5	20.0
Other commercial	3.5	9.0	1.3	4.5	1.2	4.0
Market size:						
1-25	3.5	7.5	2.5	20.0	2.7	20.0
26-50	4.3	7.5	1.8	4.5	1.9	4.5
51-100	3.9	15.0	1.5	4.5	1.3	4.5
101-150	3.5	20.0	0.9	3.0	0.8	3.0
151+	2.6	4.5	0.7	1.2	0.7	3.0
Staff size:						
Staff 51+	5.0	9.0	2.6	5.5	2.6	5.0
Staff 31-50	3.9	15.0	1.4	4.5	1.4	4.5

Staff 21-30	3.5	20.0	1.0	2.0	0.9	2.0
Staff 11-20	2.7	7.5	0.7	1.2	0.6	2.5
Staff 1-10	1.3	5.0	0.9	20.0	0.9	20.0
Affiliation:						
ABC	3.6	15.0	1.8	20.0	1.8	20.0
CBS	4.2	7.5	1.6	5.0	1.5	5.0
Fox	3.1	7.5	0.8	1.5	1.0	4.0
NBC	3.9	20.0	1.6	4.5	1.5	5.0
PBS	1.2	5.0	0.5	0.5	0	0

The average amount of news per week remained exactly the same as a year ago – at the highest level ever. The weekday average actually dropped by 6 minutes, but the Sunday average rose by the same amount. As usual, stations in the West ran less news than other regions, and Fox stations tended to run a little less news than other affiliates.

Amount of News Changes ... the past year

	Increase	Decrease	Same	Don't know
All TV News	29.7%	10.6%	59.0%	0.7
Big four affiliates	32.4	9.4	57.7	0.5
Other commercial	2.9	22.9	71.4	2.9
Market size:				
1-25	36.1	2.8	61.1	0
26-50	31.3	16.7	52.1	0
51-100	31.2	9.1	59.7	0
101-150	25.8	16.1	58.1	0
151+	26.0	6.0	64.0	4.0

Almost 60 percent of TV news directors reported keeping the amount of news steady last year; three times as many said the amount of news increased rather than decreased. But, again, the picture is markedly different than a year ago. The percentage increasing is down 28.3 percent from last year while the percentage dropping is more than double.

Amount of News Planned ... the next year

	Increase	Decrease	Same	Not sure
All TV news	24.9%	8.8%	60.8%	5.5%
Big four affiliates	25.4	5.6	64.3	4.7
Other commercial	11.4	34.3	45.7	8.6

Market size:				
1-25	24.3	8.1	67.6	0
26-50	36.2	2.1	55.3	6.4
51-100	26.0	10.4	57.1	6.5
101-150	22.6	14.5	56.5	6.5
151+	16.0	6.0	72.0	6.0

More than 60 percent of TV news directors expect the amount of news to remain the same, and the percentage expecting an increase far exceeds those expecting a drop. At the same time, the trend is down. A year ago, almost 38 percent of news directors said they expected the amount of news to increase the next year – compared to just under 25 percent this time. Non-network affiliates are the least likely to expect growth in the amount of news, but there are no other patterns based on staff size, network affiliation or geography.

TV News Budget ... the past year

	Increase	Decrease	Same	Don't know
All TV news	44.2%	19.2%	26.0%	10.6%
Big four affiliates	49.3	16.4	27.5	6.8
Other commercial	11.4	37.1	17.1	34.3
Market size:				
1-25	50.0	13.9	27.8	8.3
26-50	59.6	14.9	14.9	10.6
51-100	45.9	21.6	25.7	6.8
101-150	37.7	18.0	27.9	16.4
151+	29.8	25.5	34.0	10.6

TV news budgets were most likely to go up, but fewer of them rose in the last year (down 13.7 percent) and more were likely to decrease (up 39.1 percent) than a year ago. Again, non-network affiliates led the retreat. Budgets in the smallest markets were least likely to go up, while budgets for the largest newsrooms were most likely to increase. ABC affiliates were far less likely to increase than others, but there was no budget pattern by region.

TV News Profitability ... 1997 to 2005

	2005	2004	2003	2002	2001	2000	1999	1998	1997
Showing profit	44.5%	58.4%	55.3%	54.9%	56%	58%	57%	63%	62%
Breaking even	24.2	10.4	13.6	11.6	13	11	9	11	6
Showing loss	12.1	9.2	9.2	11.2	10	11	11	10	8
Don't know	19.2	22.0	21.9	22.3	21	20	23	16	24

This is the biggest change – and the biggest drop – since we've been reporting these numbers. Note that the biggest shift involves movement from profit to break even. We cannot compare these numbers before 1997 because the wording of the question changed.

TV News Profitability ... by Size and Affiliation - 2005

	Showing profit	Breaking even	Showing loss	Don't know
Market size				
1-25	37.8%	35.1%	16.2%	10.8%
26-50	48.9	19.1	12.8	19.1
51-100	51.4	23.6	11.1	13.9
101-150	45.9	19.7	9.8	24.6
151+	33.3	27.1	12.5	27.1
Staff size:				
51+	66.0	19.1	10.6	4.3
31-50	51.4	27.1	8.6	12.9
21-30	40.7	25.9	11.1	22.2
11-20	29.4	20.6	20.6	29.4
1-10	23.3	20.0	20.0	36.7
Affiliation:				
ABC	44.1	28.8	11.9	15.3
CBS	62.7	6.8	11.9	18.6
Fox	66.7	14.8	7.4	11.1
NBC	51.6	24.2	8.1	16.1
Big four affiliates	54.6	19.3	10.1	15.9
Other commercial	5.7	51.4	17.1	25.7

There's no pattern by market size or geography, but the biggest news departments were much more likely than others to make a profit. Fox and CBS affiliates were the most likely to show a profit; ABC affiliates the least. Non-affiliate news operations seldom made a profit (5.7 percent).

Percentage of TV Station Revenue Produced by News - 2005

	Average	Median	Minimum	Maximum	Not sure
All TV news	42.8%	45.0%	12.0%	75.0%	74.0%
Market size:					
1-25	37.9	40.0	12.0	60.0	81.9
26-50	40.7	40.0	20.0	75.0	68.1
51-100	42.8	45.0	19.0	63.0	68.1
101-150	47.1	50.0	26.0	65.0	77.0
151+	43.3	50.0	12.0	60.0	79.2
Staff size:					
51+	43.6	40.0	24.0	63.0	61.7
31-50	42.4	45.0	19.0	63.0	61.4
21-30	46.6	50.0	25.0	65.0	81.5
11-20	47.8	51.0	30.0	60.0	82.4
1-10	16.0	16.0	12.0	20.0	93.3
Affiliation:					
ABC	47.3	50.0	30.0	60.0	72.9
CBS	47.0	45.0	25.0	75.0	54.2
Fox	30.6	29.0	19.0	49.0	70.4
NBC	42.5	45.0	25.0	60.0	82.3
Big four affiliates	44.2	45.0	19.0	75.0	70.0
Other commercial	30.5	30.0	12.0	50.0	88.6

The percentage of station revenue from news dropped to 42.8 percent from last year's 46.1 percent. But last year was way up from the year before -- 39.7 percent -- and this year's number is higher than it has been for five of the last eight years that we've asked this question. The numbers are fairly constant across most groups but lower among the smallest newsrooms and the largest markets because of the non-affiliated stations.

Note that almost three-quarters of the news directors say they're unsure of the percentage of station revenue produced by news.

Radio

Ninety percent of radio newsrooms are now centralized, supplying news to as many as eight stations within a market -- most typically four stations. That's the highest it has ever been. Last year, the median was three stations. Consolidation in radio has led to a

steady shift in the number of stations that each news director reports on and forces us to keep adjusting how we collect radio data. That, in turn, makes long term comparisons difficult.

Radio Staff Size - 2005

	Avg. full-time	Median full-time	Max full-time	Avg part-time	Med part-time	Max part-time	Avg total staff	Med total staff	Max total staff
All radio news	3.0	2.0	14	1.6	1.0	21	4.6	3.0	25
Market size:									
Major	7.4	7.0	14	3.3	1.5	11	10.7	8.5	25
Large	3.9	4.0	11	1.8	1.0	6	5.7	5.0	13
Medium	2.1	2.0	7	1.8	1.0	21	3.9	3.0	22
Small	1.7	1.5	3	0.7	0	3	2.4	1.5	6

Last year, we reported that it appeared that radio news staff size had fallen sharply, but that a change in how we gathered the data – because of consolidation – could have caused the appearance of a drop. This year, the numbers are back nearly to the levels of two year’s ago. On the other hand, those people handle news on more stations. That’s why comparisons are so difficult.

Average Minutes of Locally-Produced Radio News - 2005

	All radio	Major market	Large market	Medium market	Small market
Weekdays:					
AM drive	18.1	27.9	24.1	11.7	19.2
Midday	8.7	29.1	6.6	6.3	7.5
PM drive	8.0	21.2	9.3	4.5	7.7
Night	4.6	15.3	12.1	0.7	0.8
Total weekday	39.4	93.5	52.1	23.2	35.2
Saturday:					
AM drive	5.2	8.3	5.8	3.6	5.9
Midday	2.3	6.7	2.6	1.2	2.3
PM drive	2.1	7.1	2.5	1.1	1.8
Night	1.5	6.5	2.4	0.6	0.5
Total Saturday	11.1	28.6	13.3	6.5	10.5
Sunday:					

AM drive	6.8	14.7	5.0	2.2	1.6
Midday	1.7	5.5	2.7	0.9	0.9
PM drive	1.7	6.1	2.4	1.0	0.8
Night	1.4	6.5	2.4	0.6	0.1
Total Sunday	11.6	32.8	12.5	4.7	3.4

As with staff size, the data is hard to compare from year to year because of consolidation. And, as with staff size, the amount of news also appears to be closer to the data from two years ago. Compared to last year, both major and large markets have more news but medium and small markets are the same or lower. Stations in the Northeast had more news than elsewhere.

Changes in Radio News, Staff and Budget in the last 12 months and planned for the future – 2005

	Increase	Same	Decrease	Note sure
Total news staff the past year	22.9%	65.6%	11.5%	0
Plan to change amount of staff next year	10.3	76.3	1.0	12.4
Amount of news the past year	40.2	50.5	7.2	2.1
Plan to change amount of news next year	29.9	63.9	0	6.2
Change in news budget from the year before	17.5	53.6	11.3	17.5

These numbers haven't changed a great deal in the last few years, and most of them remain fairly steady this year as well. As far as staff size is concerned, non-commercial news operations are more than twice as likely to have added staff as commercial stations and are much more likely to plan future staff increases. The biggest markets are also more likely to plan staff growth. As far as amount of news is concerned, there were no significant differences based on commercial/non-commercial, staff size, market size or region. Group-owned stations were less likely to have increased the amount of news last year and more likely to have cut it back. As far as planned changes are concerned, non-commercial stations and those in the biggest markets are most likely to plan to increase the amount of news. Non-commercial stations are three times as likely to have had budget increases as commercial stations, and stations with the biggest

staffs, in the largest markets and independents were all more likely to have budget increases than other stations.

Radio News Profitability ... 1997 to 2005

	2005	2004	2003	2002	2001	2000	1999	1998	1997
Showing profit	19.6%	22.5%	25.2%	15.2%	17%	25%	19%	22%	23%
Breaking even	14.4	17.1	13.8	13.9	17	15	18	14	20
Showing loss	3.1	7.2	2.4	7.3	0	7	6	6	6
Don't know	62.9	53.2	58.6	63.6	66	53	57	58	51

Most radio news directors really don't know about radio news profitability. We cannot compare these numbers before 1997 because the wording of the question changed.

Radio News Profitability by Market Size - 2005

	Showing profit	Breaking even	Showing loss	Don't know
Major market	15.4%	0	0	84.6%
Large market	31.6	31.6	0	36.8
Medium market	21.2	6.1	6.1	66.7
Small market	12.5	18.8	3.1	65.6

Major markets are those with 1 million or more potential 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.

Number of Stations Where the Radio News Director Oversees the News – 2005

One	26.8%
Two-Three	18.6
Four	16.5
Five-Six	19.6
Seven-Eight	18.6
Average	3.75
Median	4.0
Maximum	8

The percentage of news directors overseeing one station's news department is down only slightly. The two to three station percentage is way down, but the four and seven-

eight totals are way up. That's moved the average number of stations overseen to 3.75 and the median number up a full point to 4.0. In the last two years, the average has gone from 2.9 to 3.0 to 3.75 and the median from 2.0 to 3.0 to 4.0.

What Else Radio News Directors Do – 2005

Announcing (including sports and weather)	27.7%
Public Affairs	23.1
Production	13.8
Talk show host	13.8
Operations	13.8
Program Director	7.7
General Manager	6.2
Other	24.6

Two-thirds (67 percent) of radio news directors report that they also have other responsibilities at the station. That's actually down from nearly three-quarters last year. News directors are most likely to have other responsibilities at commercial stations and stations with smaller staffs and in the smallest markets.

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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. Data for the number of stations originating local news and getting it from others is based on a complete census and is not projected from a smaller sample.

Percentage of TV News Departments Providing Content to Other Media – 2004

	Station website	Another TV station	Cable TV channel	Local radio
All TV	70.4%	22.6%	11.7%	44.9%
Big four affiliates	73.4	22.4	14.0	47.7
Other commercial	80.0	22.9	0	45.7
Market size:				
1-25	67.6	16.2	5.4	27.0
26-50	68.8	27.1	20.8	52.1
51-100	72.7	20.8	15.6	48.1
101-150	71.0	32.3	4.8	46.8
151+	70.0	14.0	10.0	44.0

Almost all of these numbers are up from a year ago, although the increases are uniformly small.

Over 40 percent (42.5 percent) of TV news directors report that their news department is doing something that involves “convergence” -- most commonly with a newspaper.

Type of Convergence Partner	Percent of the stations of those involved in convergence
Newspaper(s)	39.8
Newspaper and radio	15.7
Web site(s)	14.5
Radio station(s)	12.0
Other	18.1

Average Number of Newsroom Workers by Position - 2005

	All TV News	Markets 1-25	Markets 26-50	Markets 51-100	Markets 101-150	Markets 151+
News Director	1.0	1.0	1.0	1.0	0.9	1.0
Assistant News Director	0.4	0.7	0.6	0.4	0.2	0.1
Managing Editor	0.3	0.6	0.4	0.4	0.1	0.2
Executive Producer	0.8	1.9	1.3	0.8	0.4	0.3
News Anchor	4.8	6.1	5.3	5.4	3.9	3.4
Weathercaster	2.5	2.7	2.6	3.0	2.2	2.1
Sports Anchor	1.5	1.6	1.6	1.7	1.4	1.2
News Reporter	6.2	8.4	8.2	6.4	4.9	3.9

Sports Reporter	0.6	0.5	0.5	0.7	0.7	0.4
Assignment Editor	1.6	3.2	2.8	1.4	0.6	0.6
News Producer	4.4	6.2	6.8	5.3	2.6	1.4
News Writer	0.5	2.1	1.0	0.2	0.1	0.1
News Assistant	0.7	1.5	0.4	1.0	0.4	0.3
Photographer	7.6	11.5	12.6	8.9	4.0	2.7
Tape Editor	2.1	4.7	3.5	2.1	0.9	0.3
Graphics Specialist	0.5	1.6	0.5	0.4	0.1	0.1
Internet Specialist	0.3	0.8	0.5	0.3	0.1	0.2

News Director Age

While the age of TV news directors this year ranged from 24 to 70, the average and median came in at 44. In 1998, the average and median were 41. Market size, staff size, network affiliation and geography don't alter the number more than two to three years one way or the other.

Typically, news directors have held that position at that station for about three years, although the average is 4.52 – brought up by some long-term news directors. Longevity also doesn't vary much by staff size, network affiliation or region, but news directors in the very largest markets have been news director a little less than other market sizes.

Radio news directors aren't much different, with the average and median age at 42. Again, market size, staff size and region make little difference. The news directors at independent – rather than group-owned -- stations tend to be slightly younger – at 38 years old.