

TV Web Sites Continue Growth ... Not So Radio

by Bob Papper

The latest RTNDA/Hofstra University Survey shows strong user growth and increasing complexity among TV station web sites. In contrast, radio web sites are largely stagnant and, in some cases, show more retrenchment than expansion.

Who Has Web Sites? 2008

All TV	97.6%	All Radio	89.2%
Market Size		Market Size	
1 - 25	94.3	Major	90.0
26 - 50	100.0	Large	100.0
51 - 100	100.0	Medium	92.6
101 - 150	96.5	Small	81.3
151+	100.0		

In TV, station web sites – at least among stations that run local news – are nearly universal. Every station with more than 30 news employees had a web site. Only a literal handful of the very smallest network affiliates don't have a web site. In fact, only small, independent stations came in below 90 percent.

Radio is little changed from a year ago, with the smallest markets remaining at just over 81 percent having web sites. The bigger the radio news staff, the more likely that the radio station had a web site; small stations in the South were less likely to have web sites than others – at least among those radio stations that run local news.

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.

How Many Web Sites Include Local News? 2008

All TV	96.9%	All Radio	65.8%
Market Size		Market Size	
1 - 25	93.9	Major	88.9
26 - 50	97.7	Large	80.0
51 - 100	96.4	Medium	60.0
101 - 150	100.0	Small	65.9
151+	98.2		

Among the TV stations with web sites, nearly every station in every category includes local news--except those stations with just 1-10 newsroom employees. And at 81.8 percent, even that group is up 9 percent from a year ago.

Whether a radio station with a web site includes local news depends on market size and staff size. Stations or clusters of stations with three or more newspeople overwhelmingly (about 90 percent) included local news on the web site; stations or groups with just one or two newspeople came in just over half (55 percent). There were no differences based on commercial/noncommercial, group or independent or geography.

Elements of Local News Web Sites 2008

TV	Text	Still Pics	Audio	Strmng Audio	Live Cam	Nws Vid	Live Nwscsts	Rcrded Nwscsts	Blogs	Pdcsts	Assmble Own Nwscsts
All TV:	97.8%	90.3%	58.6%	34.2%	49.5%	91.8%	21.3%	48.0%	52.7%	16.9%	7.8%
Markets 1 - 25	91.7	87.5	64.6	45.8	64.6	87.5	37.5	50.0	66.7	20.8	10.4
Markets 26 - 50	97.7	88.4	72.1	41.9	65.1	93.0	23.3	44.2	67.4	32.6	4.7
Markets 51 - 100	98.8	96.3	67.1	37.8	54.9	97.6	25.6	40.2	62.2	23.2	8.5
Markets 101 - 150	98.8	89.0	54.9	30.5	43.9	92.7	18.3	57.3	42.7	11.0	7.3
Markets 151+	100.0	87.0	31.5	18.5	27.8	85.2	7.4	46.3	33.3	3.7	7.4

Radio	Text	Still Pics	Audio	Strmng Audio	Live Cam	Nws Vid	Live Nwscsts	Rcrded Nwscsts	Blogs	Pdcsts	Other
All Radio:	48.6%	30.4%	25.4%	23.9%	2.9%	5.1%	4.3%	11.6%	8.0%	13.0%	2.2%
Major Market	45.5	27.3	45.5	54.5	9.1	9.1	18.2	18.2	0	27.3	9.1
Large Market	55.6	38.9	38.9	38.9	11.1	5.6	11.1	16.7	16.7	44.4	0

Medium Market	46.4	32.1	28.6	23.2	0	5.4	1.8	8.9	14.3	10.7	3.6
Small Market	51.0	28.6	14.3	14.3	2.0	4.1	2.0	12.2	0	2.0	0

For the second year in a row, there were big jumps in TV web site complexity. There were 10 percent jumps – and more – for the inclusion of audio, news video, recorded newscasts and blogs. Smaller growth for still pictures, live cameras, and live newscasts. Other areas – including streaming audio and podcasts remained the same, and allowing users to assemble their own newscasts actually slid back a bit. Not surprisingly, the complexity of what’s on the web is heavily dependent on market size and staff size: generally the bigger the station, the more complex the web site. There were no consistent differences based on region of the country or network affiliation, although web sites at independent stations were generally far less complex than at network affiliates.

Radio presents a more puzzling picture. Although there was no difference in the percentage of radio stations that had web sites this year versus last, almost all measures of complexity actually dropped from a year ago, although some barely slid down. There were few consistent differences across most of the variables--region, group ownership, commercial/non-commercial or number of stations--but radio web sites were not likely to have many of the listed elements unless they had five or more news employees. Most puzzling is the percentage of radio stations saying that they have text on their web site. All the percentages this year on text – across the board – are just over half what they were a year ago.

What Do Users Want From Your Site?

Rank	All TV This Year - 2008	All TV Last Year - 2007	All Radio This Year - 2008	All Radio Last Year - 2007
1	Local news	Local weather	Local news	Local news
2	Local weather	Local news	Local weather	Consumer news
3	Headlines	Live cameras	Local sports	Other information
4	Local sports	Headlines	Other information	Local weather

5	Other information	Local sports	Bios of on-air talent	Entertainment news
6	Education	Money	National news	Food
7	Weather elsewhere	Other info	Entertainment news	Live cameras
8	Entertainment news	Entertainment news	Traffic	Local sports
9	Sports elsewhere	Traffic	International news	Weather elsewhere
10	National news	Consumer news	Weather elsewhere	Health
11	Live cameras	Education	Headlines	International news
12	Traffic	National news	Sports elsewhere	Headlines
13	Health	Sports elsewhere	Health	Talent bios
14	Food	Weather elsewhere	Education	Traffic
15	International news	Food	Money	Education
16	Consumer news	International news	Consumer news	Money
17	Money	Health	Live cameras	National news
18	Bios of on-air talent	Talent bios	Food	Sports elsewhere

For TV, local news and local weather led the list – for the seventh straight year – although they swapped positions (as they have before). Most items changed little, and only four moved up more than two places: Education from 11 to 6, Weather elsewhere from 14 to 7, Sports elsewhere from 13 to 9 and Health from 17 to 13. Another four categories moved down more than two places: Live cameras dropped from 3 to 11, Traffic from 9 to 12, Consumer news from 10 to 16 and Money plunged from 6 to 17.

In radio, local news and weather returned to the top two spots this year. Moving up more than two places: Local sports rose from 8 to 3; Bios from 13 to 5, National news from 17 to 6, Traffic from 14 to 8 and Sports elsewhere from 18 to 12. Dropping more than two: Health from Consumer news from 2 to 16, Food from 6 to 18, Live cameras from 7 to 17 and Health from 10 to 13.

How Many People Work on the Web? 2008

	Full-time	Part-time	Total
All TV	1.96	2.14	4.10
Markets 1-25	2.12	0.65	2.77
Markets 26-50	2.35	4.94	7.29
Markets 51-100	2.47	2.15	4.61
Markets 101-150	1.66	2.07	3.72
Markets 151+	1.38	1.69	3.08
All Radio	2.0	1.6	3.6
Major Market	1.5	1.7	3.2
Large Market	2.2	1.6	3.8
Medium Market	2.0	1.6	3.6
Small Market	2.0	1.6	3.6

It's always a little hard to get a handle on this data because each year we ask not only how many web staffers a station employed this year but also how many they employed the previous year. And for the last two years, the pattern of the answers has been the same. In TV, stations report (as they did last year) that they added almost one full time staffer and almost a half a part timer. But when we compare the actual figures for this year to last year's actual employment, there's almost no difference. It's true that different stations report the results from year to year, but the pattern has been consistent. Overall, we see a small drop in web staffing among the smaller markets, an increase in middle size markets, and dead even at the very top (which includes many of the smallest newsrooms). Not surprisingly, web staffing is a function of newsroom staffing: the bigger the newsroom, the bigger the web staff, with the largest stations averaging four full timers and two part time. Stations in the West tended to have smaller web staffs than stations elsewhere, and ABC and Fox affiliates tended to have smaller web staffs than CBS and NBC affiliates. Independents and PBS affiliates were well behind any of the network affiliates.

The only staffing pattern in radio was that group-owned stations tended to have much larger web staffs than independent stations.

Do Other Staffers Help on the Web? 2008

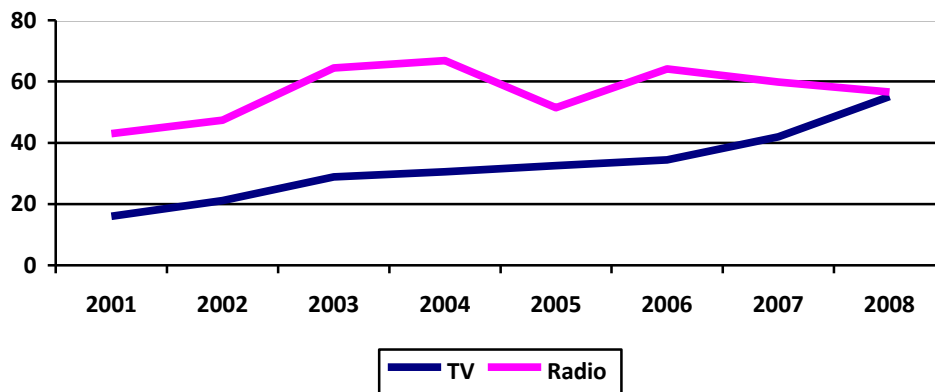
All TV	55.1%
Markets 1-25	36.5
Markets 26-50	48.0
Markets 51-100	54.3
Markets 101-150	60.9
Markets 151+	65.0
All Radio	56.6%
Major Market	53.7
Large Market	72.6
Medium Market	51.3
Small Market	56.4

The TV numbers in this category represent one of the biggest changes in the last year. This is the first time that a majority of news directors said that news staffers have at least some web responsibilities. That's up from 41.9 percent last year, which was up from 34.4 percent the year before. Generally, the smaller the market, the more likely news staff were to have web responsibilities.

Interestingly, the relationship to staff size was less pronounced. The biggest news departments (51+) were lower (45.2 percent) than other groupings, but all the other staff size groupings ranged from 53.3 percent to 62.1 percent.

Overall, radio was unchanged from a year ago, and there were no consistent differences across most of the variables. One exception: News directors at group-owned stations were much more likely (66.6 percent versus 44.6 percent) to say that the staff had at least some web responsibilities.

Percentage of stations where staff has web responsibilities 2001-2008



I first asked this question in 2001, and the percentage of news directors saying that station staff had at least some web responsibilities has risen steadily ever since, from 16 percent in 2001 to 55.1 percent now. Radio, in contrast, has varied over the years, starting at 43 percent in 2001 to 56.6 percent today.

News Director Role with Web Site 2008

	In Charge Overall	In Charge of News Content Only	No Management Role/Other
All TV	18.1%	80.0%	1.9%
Markets 1-25	31.1	66.7	2.2
Markets 26-50	13.6	81.8	4.5
Markets 51-100	15.0	83.8	1.3
Markets 101-150	20.0	77.5	2.5
Markets 151+	15.4	84.6	0
All Radio	25.5%	55.1%	19.4%
Major Market	28.6	57.1	14.3
Large Market	16.7	66.7	16.7
Medium Market	20.0	55.6	24.4
Small Market	33.3	51.5	15.2

The percentage of TV news directors in charge of the station's web site overall dropped by 7 percent, but the bigger change, over time, has been the decrease in the percentage of news directors who have no role in the web site. Two years ago, that stood at 15.1 percent. It dropped in half to 7 percent last year and now down to under 2 percent. Eighty percent of TV news directors are now in charge of the news content on the web, with most of the rest in charge of the whole web

site. TV news directors are most likely to be in charge overall in top 25 markets and at the largest stations. They are least likely to be in charge overall at Fox affiliates (9.1 percent).

Radio news directors are more likely to be in charge of station web sites overall this year than last, but there are no consistent patterns by staff size, market size, group/independent or region.

TV Station Website Traffic During the Past 30 Days

	Page Views (in millions)	Unique Visitors (in thousands)
All TV	2.78	280
Market Size		
1-25	3.44	460
26-50	6.87	390
51-100	2.25	250
101-150	2.02	320
151+	0.46	90

There has been a huge jump in traffic at TV station web sites in the last year – and a big jump in the number of TV news directors who know what the number is. In the past, I’ve worried about the reliability of the numbers because of the comparatively few TV news directors who knew what they were. That’s no longer the case. Overall, in the last year, local TV station web site traffic has gone up 54.4 percent in page views and is up 76 percent in unique visitors. Markets 26 – 50 again lead in page views, but that’s likely due to relatively lighter web traffic at the many small stations in top 25 markets. Overall, CBS affiliates had the most traffic and Fox affiliates the least.

The number of radio news directors reporting web traffic has always been too small to be reliable, and this year is on the low side as well. Still, the average radio station reported 212,000 page views and 37,000 unique visitors. Both numbers are only 1,000 more than the figures I didn’t report last year.

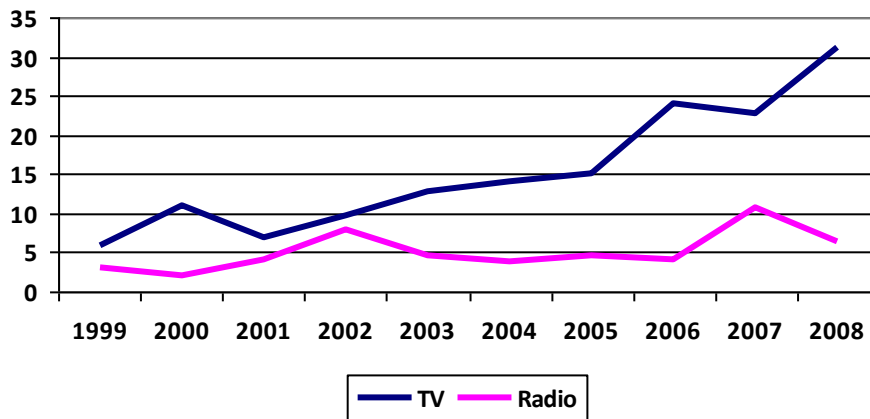
Making Money? 2008

	Profit	Breaking Even	Loss	Don't Know
All TV	31.2%	9.6%	15.8%	43.4%
Markets 1-25	28.3	15.2	17.4	39.1
Markets 26-50	38.1	7.1	14.3	40.5
Markets 51-100	42.5	7.5	10.0	40.0
Markets 101-150	24.1	10.1	17.7	48.1
Markets 151+	23.6	10.9	21.8	43.6
All Radio	6.5%	10.9%	12.0%	70.6%
Major Market	14.3	0	14.3	71.4
Large Market	21.4	7.1	7.1	64.3
Medium Market	0	16.2	8.1	73.0
Small Market	6.1	9.1	18.2	66.7

TV web site profitability hit a new high this year – up almost 9 percent from a year ago. Breaking even dropped by 1.6 percent – as did showing a loss. The profitability gains came from a modest improvement in markets 101 – 150 and a big jump in markets 51 – 100. The others were all close to a year ago. The bigger the station, the more likely for the web site to make a profit, with stations with 51+ newspeople at 47.5 percent profitability and stations with 31 – 50 news staffers at 41.5 percent profitability. There was no meaningful difference based on network affiliation.

In contrast, radio fell in profitability from last year's 10.7 percent to this year's 6.5 percent. Breaking even had a similar drop and showing a loss slid slightly. The biggest jump came in radio news directors who said they didn't know – up from last year's 57 percent to this year's 69.6 percent.

Profitability of station websites over time



I've asked about web profitability for exactly a decade, so it's interesting to take a look at the trend lines for TV and radio over that time. With two small dips, TV website profitability has moved steadily up from 6 percent in 1999 to 31.2 percent this year. Radio, in contrast, has mostly gone up and down, starting at 3 percent in 1999 and coming in at 6.5 percent this year.

Bob Papper is professor and chair of the Department of Journalism, Media Studies, and Public Relations at Hofstra University and has worked extensively in radio and TV news. This research was supported by the School of Communications at Hofstra University and the Radio Television News Directors Association.

About the Survey

The RTNDA/Hofstra University Survey was conducted in the fourth quarter of 2007 among all 1,647 operating, non-satellite television stations and a random sample of 2,000 radio stations. Valid responses came from 1,241 television stations (75.3 percent) and 138 radio news directors and general managers representing 271 radio stations.