**The survey numbers show how much the business is changing**

by Bob Papper

The latest RTDNA/Hofstra University Survey shows how much the TV business model is changing. There’s much less evidence of fundamental change in radio, but the evolution of strategies, priorities and news outlets in TV make clear that the TV business of today is a far cry from the television industry of just a few years ago.

**TV news departments are providing content over more outlets than ever before.**

Percentage of TV News Departments Providing Content to Other Media –2010

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Another local TV station | TV in another market | Cable TV channel | Local radio | Website not your own | Mobile device | Other |
| All TV | 32.7% | 13.8% | 10.7% | 52.0% | 13.8% | 44.9% | 13.8% |
| Big four affiliates | 33.5 | 12.5 | 9.7 | 52.8 | 12.5 | 46.0.0 | 14.8 |
| Other commercial | 23.5 | 23.5 | 23.5 | 35.3 | 29.4 | 41.2 | 5.9 |
| Market size: |  |  |  |  |  |  |  |
| 1-25 | 38.9 | 13.9 | 16.7 | 44.4 | 22.2 | 55.6 | 19.4 |
| 26-50 | 22.7 | 18.2 | 0 | 63.6 | 9.1 | 50.0 | 9.1 |
| 51-100 | 26.2 | 13.1 | 11.5 | 49.2 | 14.8 | 50.8 | 21.3 |
| 101-150 | 45.2 | 11.9 | 4.8 | 59.5 | 7.1 | 31.0 | 4.8 |
| 151+ | 28.6 | 14.3 | 17.1 | 48.6 | 14.3 | 37.1 | 8.6 |

Reversing a steady trend up, these numbers are almost uniformly downb from last year in every single category. Even more puzzling, mobile is actually slightly lower than a year ago, albeit less than 3 percent. ck other [This table is where you see that TV stations are not simply in the TV business – at least not just at their own stations. Nearly a third (32.7%) of TV news directors say that they run local news on another local or nearby station. That’s about the same as last year, and the percentage of stations running news on a cable channel is down slightly. But all other categories are up. “Mobile devices” is a new entry in this year's survey. Last year, it showed up under "other," but even if all of last year's "other" was mobile -- and it wasn't -- this year's figure would still represent a doubling in the last year. This year, "other" choices were spread over a wide range of activities, but the two most common were running material on one of the station's other digital channels and some sort of joint effort with a newspaper.

**Stations are heavily involved in cooperative ventures with others.** The table above deals with stations supplying news to other media. The next table deals with cooperative ventures among media outlets.

Aside from the local or nearby TV station for which you produce news, do you have a cooperative news gathering or coverage agreement with the following?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Another TV station | Local newspaper | Local radio station | Other | No |
| All TV | 23.6% | 23.6% | 27.7% | 4.0% | 38.6% |
| Market |  |  |  |  |  |
| 1 - 25 | 41.3 | 22.2 | 22.2 | 9.5 | 30.2 |
| 26 - 50 | 22.7 | 27.3 | 22.7 | 2.3 | 38.6 |
| 51 - 100 | 18.5 | 33.7 | 33.7 | 6.5 | 30.4 |
| 101 - 150 | 13.1 | 19.0 | 29.8 | 0 | 50.0 |
| 151+ | 28.6 | 14.3 | 25.4 | 1.6 | 42.9 |

Overall, more than 60 percent of stations say they're involved in some sort of cooperative news gathering or coverage agreement with another medium. Interestingly, stations in smaller markets are a little less likely to be involved in cooperative agreements than stations in larger markets. Stations with larger staffs, 31 and bigger, are also more likely to be involved in cooperative agreements than smaller operations.

ABC affiliates are a little less likely to be involved in these agreements than other affiliates. Otherwise, there were no meaningful differences by subset.

For those stations that are involved with cooperative agreements, we asked what they were sharing.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Information | Helicopter | Pool video | Other |
| All TV | 32.3% | 4.0% | 15.0% | 8.4% |
| Market |  |  |  |  |
| 1 - 25 | 30.2 | 19.0 | 33.3 | 7.9 |
| 26 - 50 | 31.8 | 2.3 | 15.9 | 9.1 |
| 51 - 100 | 44.6 | 1.1 | 13.0 | 10.9 |
| 101 - 150 | 22.6 | 0 | 2.4 | 7.1 |
| 151+ | 30.2 | 0 | 15.9 | 6.3 |

Generally, the larger the staff, the more likely that the station is sharing information, a helicopter, pool video and other. NBC and Fox affiliates are a little more likely than others to be sharing information; Fox and CBS stations were more involved with pool video; CBS stations were more involved in the other category. Stations in the Northeast were a little less likely to be involved in sharing information but more likely to be involved in sharing a helicopter and pool video.

The "other" category was all over the place. Various forms of shared content showed up most often with shared staff members coming in second.

For stations not involved in cooperative arrangements, we asked whether they were planning or discussing one. More than a quarter (28.6%) said yes. Most were in the three middle (26 – 101) market groups. This group was much less likely to include ABC affiliates and a little more likely to be in the Northeast or West.

**More and more stations are running more and more stations – digital ones.** And news departments are more and more likely to be involved in what airs on those other outlets.

Stations running material on another digital channel that news director oversees

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | All news channel | Weather channel | Other | No |
| All TV | 4.1% | 22.2% | 22.2% | 46.6% |
| Market: |  |  |  |  |
| 1 – 25 | 6.1 | 14.3 | 14.3 | 57.1 |
| 26 - 50 | 3.2 | 32.3 | 19.4 | 32.3 |
| 51 - 100 | 5.3 | 25.0 | 22.4 | 43.4 |
| 101 - 150 | 4.9 | 24.6 | 13.1 | 55.7 |
| 151+ | 0 | 16.7 | 41.7 | 39.6 |

So what's "other"? Seventeen news directors noted another TV station that they're running on a second (or third) digital channel. A dozen noted news programming -- just not all news. Seven noted weather radar. Four said informational programming, and four noted sports. Three said traffic; two said programming in another language; and one noted movies.

And plenty of news directors not already involved with another digital channel (or two) expect to be involved with it (or them) in the next year.

Plans for 2010 on another digital channel that news director oversees

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | All news channel | Weather channel | Other | No |
| All TV | 4.9% | 14.7% | 14.7% | 54.5% |
| Market: |  |  |  |  |
| 1 - 25 | 8.2 | 10.2 | 8.2 | 59.2 |
| 26 - 50 | 9.7 | 12.9 | 12.9 | 38.7 |
| 51 - 100 | 5.3 | 22.4 | 22.4 | 51.3 |
| 101 - 150 | 1.6 | 9.8 | 8.2 | 60.7 |
| 151+ | 2.1 | 14.6 | 16.7 | 58.3 |

Beyond news and weather, what are the plans? Seven news directors noted another station. Six said more news -- but not all news. Six also said they weren't sure. Four wouldn't say; two each said information or miscellaneous programming; one said foreign language programming.

**Of course, the number of social networking initiatives soared since last year.**

What is your TV station doing with social networking? 2010

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Covering the topic in newscasts | Incorporating it into storytelling | Integrating it on the website | Nothing |
| All TV | 66.9% | 58.3% | 76.3% | 8.6% |
| Market size: |  |  |  |  |
| 1-25 | 71.4 | 65.3 | 67.3 | 10.2 |
| 26-50 | 74.2 | 64.5 | 80.6 | 3.2 |
| 51-100 | 75.0 | 65.8 | 85.5 | 5.3 |
| 101-150 | 50.8 | 55.7 | 68.9 | 13.1 |
| 151+ | 66.7 | 39.6 | 77.1 | 10.4 |
| Staff size: |  |  |  |  |
| 51+ | 81.7 | 74.6 | 87.3 | 1.4 |
| 31 – 50 | 67.7 | 69.4 | 82.3 | 8.1 |
| 21 – 30 | 66.0 | 51.1 | 74.5 | 10.6 |
| 11 – 20 | 53.7 | 34.1 | 56.1 | 17.1 |
| 1 – 10 | 30.8 | 23.1 | 53.8 | 38.5 |

Other than, perhaps, mobile devices, nowhere in the survey do we see more difference from last year than in what stations are doing in social media. A year ago, almost 36 percent said they were doing nothing with social media. This year, that number is below 9 percent. Everything went up and went up substantially. Just about double in most cases.

Neither geography nor network affiliation made any meaningful difference.

Stations offered 157 examples of what they were doing with social media. Most talked about interacting with viewers and using Twitter (124 noted), Facebook (116 noted) and MySpace (8 noted) to promote newscasts or station activity. Several dozen also noted using Twitter, Facebook and the station website to help develop tips, story leads and contacts. Most of the stations said that most reporters and many of the anchors tweeted, and quite a few stations said that not only did they have a Facebook page, but so did individual newscasts. More than a dozen news directors noted efforts to get viewer feedback and comments, and several also noted requests for viewer pictures. Seven news directors talked about staff members who blog, and three noted live chats for viewer feedback.

Percentages add up to more than 100 percent because news directors could check all that apply.

Does the station or newsroom have a Facebook page?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Station only | Newsroom only | Both | No |
| All TV | 19.9% | 39.1% | 27.1% | 13.9% |
| Market |  |  |  |  |
| 1 - 25 | 8.2 | 36.7 | 34.7 | 20.4 |
| 26 - 50 | 12.9 | 35.5 | 35.5 | 16.1 |
| 51 - 100 | 26.3 | 43.3 | 25.0 | 5.3 |
| 101 - 150 | 24.6 | 37.7 | 21.3 | 16.4 |
| 151+ | 20.8 | 39.6 | 22.9 | 16.7 |
| Staff size |  |  |  |  |
| 51+ | 46.2 | 23.1 | 15.4 | 15.4 |
| 31 - 50 | 31.7 | 29.3 | 9.8 | 29.3 |
| 21 - 30 | 12.8 | 46.8 | 19.1 | 21.3 |
| 11 - 20 | 17.7 | 41.9 | 35.5 | 4.8 |
| 1 - 10 | 16.9 | 39.4 | 38.0 | 5.6 |

Note that having one or more Facebook pages is not a function of market size or staff size, although market and staff sizes do appear related to the approach the station takes to Facebook. Bigger markets and smaller staff sizes appear more likely just to have station Facebook pages. Network affiliation made no difference, other than a lower rate of Facebook involvement for non-network affiliates. Geography made relatively little difference, although stations in the Northeast were a little less likely to be involved in Facebook than others.

Is the newsroom actively involved with Twitter?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Constantly | Daily | Periodically | No |
| All TV | 36.1% | 35.3% | 16.1% | 12.5% |
| Market |  |  |  |  |
| 1 - 25 | 32.6 | 34.8 | 17.4 | 15.2 |
| 26 - 50 | 32.1 | 42.9 | 17.9 | 7.1 |
| 51 - 100 | 50.7 | 38.4 | 11.0 | 0 |
| 101 - 150 | 30.0 | 30.0 | 20.0 | 20.0 |
| 151+ | 27.7 | 34.0 | 17.0 | 21.3 |
| Staff size |  |  |  |  |
| 51+ | 46.4 | 39.1 | 14.5 | 0 |
| 31 - 50 | 41.0 | 37.7 | 16.4 | 4.9 |
| 21 - 30 | 35.6 | 40.0 | 11.1 | 13.3 |
| 11 - 20 | 25.6 | 25.6 | 23.1 | 25.6 |
| 1 - 10 | 0 | 15.4 | 7.7 | 76.9 |

Involvement with Twitter is less a function of market size -- at least directly -- than staff size. The bigger the station, the more likely that the newsroom will be involved with Twitter ... and the more likely that it will be more involved with Twitter.

**Two-thirds of TV stations say they have a 3-screen approach to news.**

Stations and a 3-screen -- on air, online, mobile -- approach to news

|  |  |  |
| --- | --- | --- |
|  | Yes | No |
| All TV | 68.8% | 31.2% |
| Market: |  |  |
| 1 - 25 | 76.2 | 23.8 |
| 26 - 50 | 80.0 | 20.0 |
| 51 - 100 | 74.6 | 25.4 |
| 101 - 150 | 61.7 | 38.3 |
| 151+ | 56.6 | 43.5 |

Generally, the larger the market, the more likely that the station has a 3-screen approach to news. NBC affiliates were more likely than other affiliates to have a 3-screen approach, and ABC affiliates were a little less likely than others to have one. Stations in the West were less likely than the rest of the country to have a 3-screen approach.

Almost all stations ranked the order of importance as: on air, followed by online, followed by mobile. However, NBC affiliates were a little more likely to place more importance online, and Fox affiliates were a little more likely to emphasize mobile, but both of those variances were small.

**Radio and Social Networking**

Clearly, radio news is lagging way behind TV in social networking.

What is your radio station doing with social networking? 2010

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Covering the topic in newscasts | Incorporating it into storytelling | Integrating it on the website | Nothing |
| All Radio | 15.8% | 9.9% | 26.6% | 61.1% |
| Market size: |  |  |  |  |
| Major | 25.8 | 19.4 | 32.3 | 61.3 |
| Large | 10.3 | 3.5 | 27.6 | 69.0 |
| Medium | 13.7 | 11.0 | 27.4 | 57.5 |
| Small | 15.9 | 7.3 | 21.7 | 62.3 |

The results on social networking depend a lot less on market size and a lot more on how many news people the station has. The big jump in social networking came with stations with three or more news people. Group-owned stations were noticeably more likely to be involved in social networking than independent stations.

Radio station news directors offered 45 examples of what they're doing. More than half noted both Facebook and Twitter. Just a few noted blogs and MySpace.

Does the station or newsroom have a Facebook page?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Station only | Newsroom only | Both | No |
| All Radio | 58.1% | 0.9% | 4.3% | 36.8% |
| Market |  |  |  |  |
| Major | 68.4 | 0 | 5.3 | 26.3 |
| Large | 50.0 | 0 | 16.7 | 33.3 |
| Medium | 75.0 | 0 | 0 | 25.0 |
| Small | 43.2 | 2.3 | 2.3 | 52.3 |

There were no consistent differences based on staffing, number of stations or ownership.

Is the newsroom actively involved with Twitter?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Constantly | Daily | Periodically | No |
| All Radio | 7.0% | 7.0% | 13.4% | 72.5% |
| Market |  |  |  |  |
| Major | 26.3 | 0 | 10.5 | 63.2 |
| Large | 5.3 | 5.3 | 10.5 | 78.9 |
| Medium | 4.3 | 15.2 | 8.7 | 71.7 |
| Small | 3.5 | 3.5 | 17.5 | 75.4 |

Overall, there was far less use of Twitter in radio than TV. Stations with large staffs were more likely to use Twitter, as were group-owned stations, but the vast majority in all cases used Twitter sparingly if at all.

Only one radio station in six (16.7 percent) said it was doing anything involving convergence. Non-commercial and stations with larger staffs were more likely to say yes.

Most common examples cited: efforts on the station's web site; working with a local TV station; working with a local newspaper; then a tie between mobile applications and public radio consortiums.

**TV and radio stations are not paying less attention to the web**

Who Has Web Sites? 2010

|  |  |  |  |
| --- | --- | --- | --- |
| All TV | 99.7% | All Radio | 96.7% |
| Market Size |  | Market Size |  |
| 1 - 25 | 100.0 | Major | 100.0 |
| 26 - 50 | 100.0 | Large | 100.0 |
| 51 - 100 | 100.0 | Medium | 97.8 |
| 101 - 150 | 98.8 | Small | 93.5 |
| 151+ | 100.0 |  |  |

Station web sites are nearly universal, but we found a TV station -- a Fox affiliate in the Midwest -- that said no, it didn't have one.

Radio rose slightly from a year ago, with all large and major market stations (that run local news) with a web site.

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? 2010

|  |  |  |  |
| --- | --- | --- | --- |
| All TV | 98.1% | All Radio | 72.2% |
| Market Size |  | Market Size |  |
| 1 - 25 | 97.9 | Major | 53.3 |
| 26 - 50 | 100.0 | Large | 71.4 |
| 51 - 100 | 98.6 | Medium | 76.7 |
| 101 - 150 | 95.1 | Small | 73.8 |
| 151+ | 100.0 |  |  |

In TV, as in the past, only the newsrooms with the smallest staffs don’t include local news. Radio numbers remained largely unchanged from a year ago.

Elements of Local News Web Sites 2010

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| TV | Text | | Still Pics | Audio | Strmng Audio | Live Cam | Nws Vid | Live Nwscsts | Rcrded Nwscsts | Blogs | Pdcsts | Assmble Own Nwscsts | Other |
| All TV: | | 94.9% | 94.5% | 65.2% | 33.2% | 61.3% | 96.9% | 35.9% | 37.5% | 69.9% | 10.2% | 2.7% | 9.0% |
| Markets 1 - 25 | | 93.5 | 84.8 | 69.6 | 43.5 | 69.6 | 97.8 | 39.1 | 28.3 | 71.7 | 6.5 | 2.2 | 6.5 |
| Markets 26 - 50 | | 90.0 | 96.7 | 70.0 | 50.0 | 83.3 | 96.7 | 43.3 | 33.3 | 90.0 | 26.7 | 3.3 | 10.0 |
| Markets 51 - 100 | | 95.9 | 98.6 | 76.7 | 43.8 | 60.3 | 97.3 | 47.9 | 37.0 | 74.0 | 16.4 | 5.5 | 8.2 |
| Markets 101 - 150 | | 96.6 | 96.6 | 55.2 | 17.2 | 55.2 | 96.6 | 32.8 | 31.0 | 60.3 | 3.4 | 1.7 | 8.6 |
| Markets 151+ | | 97.9 | 95.8 | 54.2 | 16.7 | 50.0 | 97.9 | 14.6 | 56.3 | 62.5 | 2.1 | 0 | 12.5 |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Radio | Text | | Still Pics | Audio | Strmng Audio | Live Cam | Nws Vid | Live Nwscsts | Rcrded Nwscsts | Blogs | Pdcsts | Other |
| All Radio: | | 87.5% | 51.0% | 55.8% | 41.3% | 2.9% | 11.5% | 9.6% | 21.2% | 20.2% | 23.1% | 2.9% |
| Major Market | | 92.3 | 76.9 | 61.5 | 46.2 | 0 | 23.1 | 23.1 | 38.5 | 30.8 | 53.8 | 15.4 |
| Large Market | | 92.9 | 35.7 | 64.3 | 42.9 | 14.3 | 14.3 | 14.3 | 14.3 | 28.6 | 21.4 | 0 |
| Medium Market | | 86.5 | 40.5 | 48.6 | 37.8 | 2.7 | 10.8 | 2.7 | 13.5 | 16.2 | 24.3 | 2.7 |
| Small Market | | 84.6 | 56.4 | 59.0 | 43.6 | 0 | 7.7 | 10.3 | 25.6 | 17.9 | 12.8 | 0 |

We appear to see a maturing of the web sites, especially in TV. Text, still pictures and news video are now essentially universal on TV web sites. The use of audio, live cameras, recorded newscasts and blogs all went up noticeably. But a number of areas either leveled off or fell: streaming audio, podcasts and assemble your own newscasts. Recorded newscasts edged up slightly, but the numbers suggest that, more and more, stations are deciding that certain web elements aren't working that well for them -- or aren't worth the effort -- and they're either scaling them back or not bothering with them at all. Allowing the audience to assemble their own newscasts actually peaked at around 10 percent a few years ago ... and has edged down ever since. Consistent with past results, the largest stations tend to have the most complex web sites. There are no meaningful distinctions based on network affiliation or geography, although PBS affiliates have far less complex web sites than their commercial counterparts.

Most of the radio numbers are pretty close to last year’s. The exceptions include audio, streaming audio and blogs -- all of which went up. Still pictures and news video both dropped slightly. Although we list the radio subset of market size, that actually has little to do with the complexity of radio websites today. The key determinant of complexity is how many people work in news. The consistent jump in website complexity comes when a station or group has at least three people in news.

What Do Users Want From the Station Web Site?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Rank | All TV - 2010 | All TV - 2009 | All Radio - 2010 | All Radio - 2009 |
| 1 | Local weather | Local news | Local news | Local weather |
| 2 | Local news | Local weather | Local weather | Local news |
| 3 | Other information | Local sports | Local sports | International news |
| 4 | Headlines | Headlines | Other information | National news |
| 5 | Local sports | National news | Weather elsewhere | Headlines |
| 6 | National news | Bios of on air talent | National news | Sports elsewhere |
| 7 | Health | Other information | Entertainment news | Consumer news |
| 8 | Weather elsewhere | Entertainment news | Live cameras | Education |
| 9 | Consumer news | Health | Bios of on-air talent | Health |
| 10 | Entertainment news | Weather elsewhere | Headlines | Bios of on-air talent |
| 11 | Bios of on-air talent | Consumer news | International news | Entertainment news |
| 12 | Education | Traffic | Consumer news | Weather elsewhere |
| 13 | Traffic | Live cameras | Sports elsewhere | Live cameras |
| 14 | Money | Money | Education | Local sports |
| 15 | Live cameras | Education | Food | Food |
| 16 | Food | Food | Traffic | Money |
| 17 | International news | Sports elsewhere | Money | Traffic |
| 18 | Sports elsewhere | International news | Health | Other |

For TV, local weather and local news led the list -- as they always do. "Other information" had never been as high as third place before. Only two other categories moved up or down more than two places: Education rose by three; bios of on-air talent fell by five.

The "other" category really does involve a wide array of choices. Among the top picks: photo galleries, school closings, video, user-generated content, contests and promotions and breaking news.

In radio, local news and local weather took the top two spots. They reversed position, as they have before. Local sports shot up to number three from last year's surprisingly low number 14. "Other" shot up as well. The most popular "other" included events/community calendar and program schedule, followed closely by contests and promotions and some form of commerce. Others moving up substantially: weather elsewhere, entertainment news and live cameras. Moving down substantially: headlines, international news, consumer news, sports elsewhere, education and health.

How Many People Work on the Web? 2010

|  |  |  |  |
| --- | --- | --- | --- |
|  | Full-time | Part-time | Total |
| All TV | 2.8 | 4.5 | 7.3 |
| Markets 1-25 | 3.4 | 2.7 | 8.3 |
| Markets 26-50 | 2.7 | 5.6 | 8.3 |
| Markets 51-100 | 2.6 | 2.4 | 4.9 |
| Markets 101-150 | 2.9 | 4.0 | 6.9 |
| Markets 151+ | 2.7 | 6.6 | 9.3 |
|  |  |  |  |
| All Radio | 1.2 | 1.8 | 3.0 |
| Major Market | 1.3 | 2.4 | 3.7 |
| Large Market | 1.5 | 1.9 | 3.4 |
| Medium Market | 1.3 | 2.0 | 3.3 |
| Small Market | 1.0 | 1.4 | 2.4 |

We compare web staffing – from one year to the next -- in two ways. First, the survey asks news directors to tell us how many full and part timers they have now -- and how many they had the year before. Then we also compare the "now" to what last year's respondents said for "now." Usually, the results are fairly close, but that's not the case this year. This year's respondents reported, overall, that they stayed about the same in web staff in the last year. But if we compare this year's answers to the answers we received last year, then web staffing went up one full time person and one part timer. Different news directors and different stations could account for some of the difference, but all categories and groupings are up over a year ago. Since one comparison is based on memory and the other on count, I suspect that web staffing really did go up noticeably in the last year. Overall, ABC and CBS stations tended to have bigger web staffs than Fox or NBC stations.

In radio, full time web staffing actually dropped slightly, but part time staffing rose some. On balance, radio web staffing rose by about half of a part time person, but that’s almost nothing. There were few differences based on sub-groupings, but group-owned stations tended to have slightly more web staffing than independent stations.

Do Other Staffers Help on the Web? 2010

|  |  |
| --- | --- |
| All TV | 70.9% |
| Markets 1-25 | 59.7 |
| Markets 26-50 | 63.9 |
| Markets 51-100 | 70.5 |
| Markets 101-150 | 75.7 |
| Markets 151+ | 79.2 |
|  |  |
| All Radio | 61.1% |
| Major Market | 57.3 |
| Large Market | 52.8 |
| Medium Market | 53.2 |
| Small Market | 73.5 |

Every year, the percentage of staffers working on the web goes up, and this year's number is up more than 10 percent. In fact, every market size except the biggest rose by at least that much; markets 1-25 went up only slightly less. Staffers in the Northeast are a little less likely than elsewhere to help with the web -- as are staffers at Fox affiliates.

The radio numbers are little different from a year ago.

Percentage of stations where staff has web responsibilities 2001-2010



The last decade has seen a nearly straight line up in percentage of TV news staffers who have at least some web responsibilities. Radio, in contrast, has varied over the years.

News Director Role with the Web Site 2010

|  |  |  |  |
| --- | --- | --- | --- |
|  | In Charge Overall | In Charge of News Content Only | No Management Role/Other |
| All TV | 22.5% | 70.0% | 7.5% |
| Markets 1-25 | 27.7 | 59.6 | 12.8 |
| Markets 26-50 | 16.7 | 76.7 | 6.7 |
| Markets 51-100 | 20.8 | 73.6 | 5.6 |
| Markets 101-150 | 19.3 | 73.7 | 7.0 |
| Markets 151+ | 28.3 | 65.2 | 6.5 |
|  |  |  |  |
| All Radio | 26.8% | 53.6% | 19.6% |
| Major Market | 44.4 | 33.3 | 22.2 |
| Large Market | 27.3 | 54.5 | 18.2 |
| Medium Market | 12.8 | 66.7 | 20.5 |
| Small Market | 35.1 | 45.9 | 18.9 |

On the surface, there doesn't appear to be much change in the website management role of news directors from a year ago, but there are actually two striking differences. There was a near doubling of the percentage of Fox news directors who are now in charge of the station's web site overall. At the same time, the percentage of independent news directors who oversee the station's web site plummeted. The two balanced each other out, so the overall numbers appear largely unchanged.

Overall, the radio numbers are little changed from a year ago. Radio news directors are more likely to be in charge overall at independent stations, as they were last year as well.

TV Station Website Traffic During the Past 30 Days

|  |  |  |
| --- | --- | --- |
|  | Page Views (in millions) | Unique Visitors (in thousands) |
| All TV | 4.5 | 284.8 |
| Market Size |  |  |
| 1-25 | 7.2 | 480.8 |
| 26-50 | 16.5 | 481.2 |
| 51-100 | 3.1 | 351.0 |
| 101-150 | 1.9 | 137.2 |
| 151+ | 0.8 | 75.3 |

Total TV page views are way up over a year ago, but unique visitors are up only slightly. The lower numbers for the largest markets appear to be the result of low page views and visitors to some of the smaller independents in the biggest markets.

Too few radio news directors report web traffic, so I still don’t consider the numbers to be reliable enough to report.

Making Money? 2010

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Profit | Breaking Even | Loss | Don’t Know |
| All TV | 35.0% | 7.4% | 14.4% | 43.2% |
| Markets 1-25 | 34.1 | 2.4 | 14.6 | 48.8 |
| Markets 26-50 | 46.4 | 7.1 | 17.9 | 28.6 |
| Markets 51-100 | 47.1 | 2.9 | 14.3 | 35.7 |
| Markets 101-150 | 26.8 | 10.7 | 8.9 | 53.6 |
| Markets 151+ | 21.3 | 14.9 | 19.1 | 44.7 |
|  |  |  |  |  |
| All Radio | 9.7% | 11.7% | 15.5% | 63.1% |
| Major Market | 8.3 | 0 | 8.3 | 83.3 |
| Large Market | 0 | 25.0 | 25.0 | 50.0 |
| Medium Market | 15.4 | 10.3 | 15.4 | 59.0 |
| Small Market | 7.7 | 10.3 | 15.4 | 66.7 |

These may be tough economic times, but TV station web sites have continued to climb in profitability -- up 4.3 percent in the last year. A sizeable percentage of news directors still don't know the answer. The bigger the staff, the more likely that the web site makes a profit. The profitability numbers run from a low of 8.3 percent at the smallest staff sizes straight up to 50% at the biggest stations. For whatever reason, news directors at ABC affiliates are less likely to know about web profitability than other news directors.

Radio web sites didn't fare as well as TV. The percentage making a profit and breaking even both fell, although modestly. The percentage losing rose. Nearly two-thirds of radio news directors didn't know whether the web site made a profit. Web sites at group-owned stations tended to do better than independents.

Profitability of station websites over time



Note that over the past decade, TV has gone almost steadily up in profitability even as radio has generally moved up and down.

**TV and radio technology**

Percentage of stations broadcasting local news in high definition

|  |  |
| --- | --- |
|  | Percent Yes |
| All TV | 33.1% |
| Market: |  |
| 1 - 25 | 67.4 |
| 26 - 50 | 65.5 |
| 51 - 100 | 23.3 |
| 101 - 150 | 20.0 |
| 151+ | 10.4 |

The critical distinction is market size, with two-thirds of the top 50 markets already running local news in HD and all other market sizes below one-quarter. There's no meaningful difference by geography, but ABC affiliates in the survey were a little less likely to broadcast local news in HD than other affiliates.

A quarter of those who said they were not already broadcasting local news in HD said they planned to do so this year. Again, the bigger the market, the more likely they were to say yes to this year. Forty percent of the news directors in top 25 markets said yes to this year if they weren't already doing it. That dropped to 15 percent for markets 151+.

In radio, we asked -- as we have in the past -- about the use of digital technologies in news gathering. Digital technology use in radio news has continued to edge up.

Which of the following technologies are you using for news?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Digital audio recording | Digital editing & mixing | Digital or cell phones | Field laptops for editing | MP3 |
| All radio | 62.6% | 54.2% | 39.4% | 12.3% | 50.7% |
| Market |  |  |  |  |  |
| Major | 58.1 | 48.4 | 32.3 | 19.4 | 41.9 |
| Large | 55.2 | 37.9 | 31.0 | 17.2 | 41.4 |
| Medium | 63.0 | 57.5 | 39.7 | 9.6 | 43.8 |
| Small | 66.7 | 59.4 | 44.9 | 10.1 | 65.2 |

Overall, the numbers didn't change much between commercial and non-commercial, number of staff or stations, group ownership or region.

Percentage of news material...

|  |  |  |  |
| --- | --- | --- | --- |
|  | Gathered digitally | Mixed & edited digitally | Played back or aired digitally |
| All radio | 76.6% | 80.9% | 82.5% |
| Market |  |  |  |
| Major | 89.4 | 88.1 | 93.1 |
| Large | 93.1 | 87.7 | 85.9 |
| Medium | 74.4 | 78.3 | 81.8 |
| Small | 70.2 | 78.1 | 77.6 |

Non-commercial stations were more likely to be more digital. So were bigger stations and stations in the Northeast. Number of stations or group ownership made no difference.

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**About the Survey**

The RTDNA/Hofstra University Survey was conducted in the fourth quarter of 2009 among all 1,770 operating, non-satellite television stations and a random sample of 4,000 radio stations. Valid responses came from 1,355 television stations (76.6 percent) and 203 radio news directors and general managers representing 301 radio stations.

Some data sets (e.g. the number of TV stations originating local news, getting it from others and women TV news directors) are based on a complete census and are not projected from a smaller sample.