**Increasing Maturity on the Web**

by Bob Papper

You'd think the web was old media, given how few changes I found this year for both TV and radio in the latest RTDNA/Hofstra University Annual Survey. Still, there's always some change, and some of that may provide real insight on where we're heading.

Who Has Web Sites? 2011

|  |  |  |  |
| --- | --- | --- | --- |
| All TV | 99.4% | All Radio | 92.6% |
| Market Size |  | Market Size |  |
| 1 - 25 | 97.9 | Major | 100 |
| 26 - 50 | 100 | Large | 90.9 |
| 51 - 100 | 100 | Medium | 95.9 |
| 101 - 150 | 98.8 | Small | 85.0 |
| 151+ | 100 |  |  |

As with last year, we only found two small television stations that run local news that don't have websites.

Radio is down just slightly from a year ago.

How Many Web Sites Include Local News? 2011

|  |  |  |  |
| --- | --- | --- | --- |
| All TV | 100.0% | All Radio | 82.9% |
| Market Size |  | Market Size |  |
| 1 - 25 | 100 | Major | 95.2 |
| 26 - 50 | 100 | Large | 90.0 |
| 51 - 100 | 100 | Medium | 80.4 |
| 101 - 150 | 100 | Small | 76.5 |
| 151+ | 100 |  |  |

All the TV stations that run local news and have a website include local news on the site.

Radio is up more than 10 points since last year. The larger the staff and the more stations in the local group, the more likely that the station(s) has local news on the web.

Elements of Local News Web Sites 2011 -2010

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| TV | Text | Still Pics | Audio | Strmng Audio | Live Cam | Nws Vid | Live Nwscsts | Rcrded Nwscsts | Blogs | Pdcsts | Assmble Own Nwscsts | Mobile related | Other |
| All TV: | 93.9% | 91.6% | 62.8% | 34.3% | 53.7% | 96.4% | 36.9% | 42.4% | 62.5% | 14.2% | 3.2% | 56.0% | 6.1% |
| Markets 1 - 25 | 91.3 | 84.8 | 69.6 | 41.3 | 63.0 | 95.7 | 50.0 | 45.7 | 65.2 | 19.6 | 0 | 63.0 | 2.2 |
| Markets 26 - 50 | 91.8 | 91.8 | 61.2 | 42.9 | 69.4 | 98.0 | 44.9 | 38.8 | 75.5 | 20.4 | 6.1 | 67.3 | 4.1 |
| Markets 51 - 100 | 96.2 | 97.4 | 78.2 | 38.5 | 66.7 | 97.4 | 42.3 | 42.3 | 75.6 | 16.7 | 2.6 | 57.7 | 14.1 |
| Markets 101 - 150 | 96.3 | 93.8 | 51.3 | 30.0 | 38.8 | 95.0 | 30.0 | 42.5 | 48.8 | 11.3 | 5.0 | 52.5 | 3.8 |
| Markets 151+ | 91.1 | 85.7 | 53.6 | 21.4 | 35.7 | 96.4 | 21.4 | 42.9 | 50.0 | 5.4 | 1.8 | 42.9 | 3.6 |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Radio | Text | Still Pics | Audio | Strmng Audio | Live Cam | Nws Vid | Live Nwscsts | Rcrded Nwscsts | Blogs | Pdcsts | User Assmbl | Mobile related | Other |
| All Radio: | 87.8% | 61.1% | 58.9% | 50.0% | 7.8% | 32.2% | 11.1% | 33.3% | 24.4% | 34.4% | 2.2% | 7.8% | 2.2% |
| Major Market | 90.0 | 70.0 | 65.0 | 75.0 | 20.0 | 45.0 | 25.0 | 35.0 | 40.0 | 55.0 - | 0 | 20.0 | 0 |
| Large Market | 88.9 | 55.6 | 55.6 | 55.6 | 11.1 | 22.2 | 11.1 | 33.3 | 22.2 | 44.4 | 0 | 11.1 | 0 |
| Medium Market | 89.2 | 59.5 | 56.8 | 40.5 | 0 | 35.1 | 0 | 29.7 | 27.0 | 32.4 | 5.4 | 0 | 2.7 |
| Small Market | 83.3 | 58.3 | 58.3 | 41.7 | 8.3 | 20.8 | 16.7 | 37.5 | 8.3 | 16.7 | 4.2 | 8.3 | 4.2 |

A year ago, I noted that the numbers for TV websites made it look like the medium is starting to mature, with relatively small changes from one year to the next. This year's figures appear to bear that out. Live cameras and blogs are down a little; recorded newscasts are up. Mobile is a new, separate category, so I can't compare it to previous numbers. But overall, the TV numbers for what's on the website look at lot like last year's.

In radio, the level of website complexity is generally up this year, with the biggest jump in news video -- up 20 points from a year ago. Still pictures, streaming audio, recorded newscasts and podcasts were all up around 10 points from a year ago. Bigger stations and bigger markets led the way; the smallest stations were largely unchanged from a year ago.

What Do Users Want From the Station Web Site?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Rank | All TV - 2011 | All TV - 2010 | All Radio - 2011 | All Radio - 2010 |
| 1 | Local news | Local weather | Local news | Local news |
| 2 | Local weather | Local news | Local weather | Local weather |
| 3 | Local sports | Other information | Local sports | Local sports |
| 4 | News headlines | Headlines | School closings\* | Other information |
| 5 | School closings\* | Local sports | National news | Weather elsewhere |
| 6 | Photo galleries\* | National news | News headlines | National news |
| 7 | Contests/  Promotions\* | Health | Contests/  Promotions\* | Entertainment news |
| 8 | Entertainment news | Weather elsewhere | Entertainment news | Live cameras |
| 9 | National news | Consumer news | Other information | Bios of on-air talent |
| 10 | Bios of on-air talent | Entertainment news | Photo galleries\* | Headlines |
| 11 | Other information | Bios of on-air talent | Bios of on-air talent | International news |
| 12 | Traffic | Education | Traffic | Consumer news |
| 13 | Live cameras | Traffic | Sports elsewhere | Sports elsewhere |
| 14 | User-generated content\* | Money | International news | Education |
| 15 | Weather elsewhere | Live cameras | User-generated content\* | Food |
| 16 | Education | Food | Education | Traffic |
| 17 | Health | International news | Consumer news | Money |
| 18 | Consumer news | Sports elsewhere | Money | Health |
| 19 | Money |  | Food |  |
| 20 | International news |  | Health |  |
| 21 | Food |  | Weather elsewhere |  |
| 22 | Sports elsewhere |  | Live cameras |  |

\*New choices in the 2011 Survey

Local news, weather and sports took the top three spots (in that order) for both TV and radio this year. That's where I most often see them. A direct comparison with previous years is harder because I added four new categories this time around: school closings, contests/promotions, photo galleries and user-generated content. Three of the four new entries finished among the top 10 for both TV and radio this year. I suspect that user-generated content, which came in 14 and 15, respectively, will make it up there in the not too distant future.

"Other information" came in 11th in TV and 9th in radio. In television, the top "other" items noted were bizarre news or bizarre videos and obituaries. In radio, the top "other" group included Twitter, vlogs and YouTube videos.

Percentage of web content that's only on the web - 2011

|  |  |
| --- | --- |
|  |  |
| All TV | 28.6% |
| Markets 1-25 | 35.6 |
| Markets 26-50 | 28.3 |
| Markets 51-100 | 31.3 |
| Markets 101-150 | 26.1 |
| Markets 151+ | 24.0 |
|  |  |
| Staff size |  |
| 51+ | 32.8 |
| 31 - 50 | 30.6 |
| 21 - 30 | 26.9 |
| 11 - 20 | 24.5 |
| 1 - 10 | 27.3 |

This is a new question this year. Overall, the bigger the market and the bigger the station, the more material on a station's website that's only on the web (and not from or on air). Network affiliation made little difference, although NBC affiliates were a little lower than others. Other commercial stations (many of which are in larger markets) were higher than network affiliates, and non-commercial stations were significantly lower. Region made no difference.

Percentage of web content that's user-generated - 2011

|  |  |
| --- | --- |
|  |  |
| All TV | 8.9% |
| Markets 1-25 | 6.5 |
| Markets 26-50 | 8.7 |
| Markets 51-100 | 9.4 |
| Markets 101-150 | 10.2 |
| Markets 151+ | 8.2 |
|  |  |
| Staff size |  |
| 51+ | 9.4 |
| 31 - 50 | 9.0 |
| 21 - 30 | 11.3 |
| 11 - 20 | 10.4 |
| 1 - 10 | 1.5 |

Another new question, the use of user-generated content appears to be a philosophical one rather than a function of the usual parameters. Non-commercial stations were virtually non-existent in this category. Other commercial stations were much lower than the big four affiliates, although NBC affiliates were lower than the rest. The differences were small, but stations in the Midwest and West were a little lower than stations in the Northeast and South.

How Many People Work on the Web? 2011

|  |  |  |  |
| --- | --- | --- | --- |
|  | Full-time | Part-time | Total |
| All TV | 2.1 | 1.9 | 4.1 |
| Markets 1-25 | 3.5 | 2.0 | 5.9 |
| Markets 26-50 | 2.6 | 1.1 | 3.9 |
| Markets 51-100 | 2.0 | 1.4 | 2.9 |
| Markets 101-150 | 1.5 | 2.8 | 4.7 |
| Markets 151+ | 1.2 | 2.3 | 3.3 |
|  |  |  |  |
| All Radio | 1.2 | 1.0 | 1.9 |
| Major Market | 1.5 | 0.9 | 1.9 |
| Large Market | 1.3 | 1.1 | 2.3 |
| Medium Market | 1.2 | 1.4 | 2.2 |
| Small Market | 0.9 | 0.8 | 1.4 |

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." Until two years ago, the results were fairly close, but that's not the case again this year. A year ago, stations reported that their web staff stayed about the same, but I showed the actual number going up. This year, news directors report that web staff rose slightly, but I show actual web employment having dropped just over a half a full time position. Markets 1 - 50 are very close between the two measurements, but that's not the case for markets 51+. Different news directors and different stations could account for some of the difference, but I'd expect the numbers to be closer and more variable (up and down) rather than all in one direction. Since one comparison is based on memory and the other on count, I suspect that web staffing really did go down slightly in the last year. There were no meaningful staff differences based on network affiliation or geography.

In TV, full time web staffing is surprisingly similar among station groupings -- except for stations with the biggest staffs (51+), which are noticeably bigger (1.5 full timers more than any of the others).

Radio web staffing is unchanged from a year ago. The stations included in the survey this year reported that they were up one-tenth of 1 full timer in the last year, but, once again, last year's stations reported exactly the same number of full timers as this year. Bigger markets and stations with bigger staffs had only slightly more people working on the web. Group-owned stations tended to have a larger web staff than independent stations.

Do Other Staffers Help on the Web? 2011

|  |  |
| --- | --- |
| All TV | 80.2% |
| Markets 1-25 | 73.9 |
| Markets 26-50 | 75.4 |
| Markets 51-100 | 80.7 |
| Markets 101-150 | 80.9 |
| Markets 151+ | 86.0 |
|  |  |
| All Radio | 86.1% |
| Major Market | 87.3 |
| Large Market | 81.9 |
| Medium Market | 94.0 |
| Small Market | 78.3 |

In terms of newsroom staffers helping with the web, TV jumped by 10 points in the last year, mostly because larger stations went up so much and got a lot closer to the participation rates of smaller stations. Even stations with 51+ staffers passed 70%.

Radio jumped 25 points, mostly as a result of huge increases among medium, large and major market numbers.

Percentage of stations where staff has web responsibilities 2001-2010

The bottom line for both TV and radio is simple: Newsroom employees should view the web as part of their job, regardless of station or market.

News Director Role with the Web Site 2011

|  |  |  |  |
| --- | --- | --- | --- |
|  | In Charge Overall | In Charge of News Content Only | No Management Role/Other |
| All TV | 22.3% | 72.0% | 5.7% |
| Markets 1-25 | 33.3 | 55.6 | 11.1 |
| Markets 26-50 | 25.0 | 72.9 | 2.1 |
| Markets 51-100 | 23.3 | 72.6 | 4.1 |
| Markets 101-150 | 14.1 | 80.8 | 5.1 |
| Markets 151+ | 21.4 | 71.4 | 7.1 |
|  |  |  |  |
| All Radio | 23.1% | 64.8% | 12.1% |
| Major Market | 22.2 | 55.6 | 22.2 |
| Large Market | 22.2 | 77.8 | 0 |
| Medium Market | 17.6 | 70.6 | 11.8 |
| Small Market | 30.0 | 60.0 | 10.0 |

As far as the role of the news director is concerned, overall, the numbers for both television and radio are little changed from a year ago. In TV, news directors at Fox affiliates are twice as likely to be in charge overall as news directors from other network affiliates. In radio, the percentage of news directors with no management role dropped, and the percentage in charge of news went up.

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.

TV Station Website Traffic During the Past 30 Days

|  |  |  |
| --- | --- | --- |
|  | Page Views (in millions) | Unique Visitors (in thousands) |
| All TV | 3.0 | 409.6 |
| Market Size |  |  |
| 1-25 | 4.6 | 837.5 |
| 26-50 | 4.6 | 465.6 |
| 51-100 | 3.4 | 404.1 |
| 101-150 | 1.7 | 243.1 |
| 151+ | 0.9 | 176.3 |

Total TV page views are down from a year ago, but unique visitors are up significantly.

Radio web traffic numbers are still reported by too few news directors to be viewed as reliable. Still, overall, the average number of page views in radio was 455,400, and the average number of unique visitors was 209,400. Way too few radio news directors reported numbers to be able to break down the web traffic any more than those overall figures.

Is the Website Making Money? 2011

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Profit | Breaking Even | Loss | Don’t Know |
| All TV | 31.6% | 10.7% | 15.1% | 42.6% |
| Markets 1-25 | 35.0 | 7.5 | 12.5 | 45.0 |
| Markets 26-50 | 24.4 | 17.8 | 15.6 | 42.2 |
| Markets 51-100 | 41.3 | 9.3 | 12.0 | 37.3 |
| Markets 101-150 | 26.9 | 11.5 | 15.4 | 46.2 |
| Markets 151+ | 28.3 | 7.5 | 20.8 | 43.4 |
|  |  |  |  |  |
| All Radio | 16.1% | 9.7% | 11.8% | 62.4% |
| Major Market | 11.1 | 5.6 | 5.6 | 77.8 |
| Large Market | 11.1 | 0 | 22.2 | 66.7 |
| Medium Market | 16.2 | 10.8 | 13.5 | 59.5 |
| Small Market | 20.7 | 13.8 | 10.3 | 55.2 |

TV website profitability is down slightly. Generally, the bigger the staff, the more likely it is that the website makes money. The profitability percentage was either up or the same for markets 1 - 25 and 101+, but markets 26 - 100 fell. A higher percentage of CBS affiliates report a profitable website than other affiliates, and ABC reports a lower percentage, but more CBS news directors know website profitability and fewer ABC ones do, so the difference may just be a function of who knows the answer to the question.

Radio web sites didn't fare as well as TV, but the percentage reporting a profit rose from under 10% last year to over 16% this year, and that's the highest it's ever been. All market sizes went up.

Profitability of station websites over time

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

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**About the Survey**

The RTDNA/Hofstra University Survey was conducted in the fourth quarter of 2010 among all 1,729 operating, non-satellite television stations and a random sample of 3,000 radio stations. Valid responses came from 1,360 television stations (78.7 percent) and 203 radio news directors and general managers representing 603 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.