**The Changing TV News Business ... and Newer Media**

by Bob Papper

The latest RTDNA/Hofstra University Survey shows again that the TV news business isn't limited to TV anymore. These numbers actually reflect a drop in most categories from a year ago. Although the numbers are down, they're not down much, and we might simply be seeing more specialization. So, whether the drop in these numbers represents a stabilization or retrenchment is something I won't know for another year. Still, more than three-quarters (78.4%) of stations provide local news content to one or more other media -- beyond their own station or website.

 **TV news departments are providing content to a variety of other outlets**

Percentage of TV News Departments Providing Content to Other Media – 2011

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Another local TV station | TV in another market | Cable TV channel | Local radio | Website not your own | Mobile device | Other |
| All TV | 25.1%  | 10.2%  | 9.9%  | 43.1%  | 9.9%  | 42.0%  | 8.2%  |
| Big four affiliates | 26.7  | 8.5  | 10.4  | 44.3  | 9.8  | 45.0  | 8.8  |
| Other commercial  | 12.0  | 32.0  | 8.0  | 28.0  | 8.0  | 20.0  | 4.0  |
| Market size: |  |  |  |  |  |  |  |
| 1-25 | 26.3  | 15.8  | 15.8  | 33.3  | 12.3  | 42.1  | 10.5  |
| 26-50 | 27.3  | 7.3  | 16.4  | 41.8  | 14.5  | 41.8  | 9.1  |
| 51-100 | 27.9  | 7.0  | 8.1  | 41.9  | 8.1  | 53.5  | 11.6  |
| 101-150 | 26.7  | 9.3  | 7.0  | 47.7  | 10.5  | 34.9  | 4.7  |
| 151+ | 15.3  | 13.6  | 5.1  | 49.2  | 5.1  | 35.6  | 5.1  |

Even more puzzling than the overall, slight downward trend is that mobile is actually slightly lower than a year ago, too, albeit less than 3 percent. "Other" was most often a digital channel or a newspaper. Over three-quarters of all groupings of stations (by staff size, region, etc.) provide content to others ... with three exceptions: the smallest newsrooms (1 - 10 staffers), other commercial and non-commercial stations. Those three are all around 60%, rather than the 80% of every other group.

I asked a separate question this year on whether a station was producing news on another local or nearby station. Logic suggests that that number should mirror the number for "another local TV station," but it doesn't. The table above found 25.1% of stations say they produce news on another local TV station . But 30.4% said they're producing news that runs on another local or nearby station. It's hard to imagine that the difference hinges on "nearby." Those 30.4% said they were producing news on an average of 1.42 stations. I track stations that get news from another station, but if this number is correct, then there are a lot more of those stations receiving news than I'm aware of. It's possible that the difference involves other digital channels, which I could well be behind in tracking as opposed to more distinctly separate stations.

**Stations remain 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. Overall, the numbers are down slightly from last year, but, still, 59% of stations have a cooperative arrangement with another medium.

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 | 21.5%  | 25.6%  | 28.2%  | 3.8%  | 41.0%  |
| Market |  |  |  |  |  |
| 1 - 25 | 51.0  | 16.3  | 16.3  | 8.2  | 30.6  |
| 26 - 50 | 14.6  | 31.3  | 25.0  | 4.2  | 41.7  |
| 51 - 100 | 12.8  | 34.6  | 32.1 | 2.6  | 41.0  |
| 101 - 150 | 13.6  | 27.2  | 37.0  | 3.7  | 42.0  |
| 151+ | 25.0  | 14.3 | 23.2  | 1.8  | 48.2  |

Overall, 59% of stations say they're involved in some sort of cooperative news gathering or coverage agreement with another medium. That's actually down a percent from a year ago. The steady rise in cooperation with another TV station or a local radio station has stabilized, and so has the steady drop in the percentage of TV stations working with a local newspaper. Cooperative ventures with newspapers have been dropping steadily since 2005, but it actually edged up 2% this year. Overall, the larger the market, the more likely to see a station involved in some sort of cooperative arrangement, but specific cooperative choices also tend to be more and more market specific. Another TV station is much more likely to be a top 25 market phenomenon Local newspaper tends to be higher in markets 26 - 150. Radio mostly goes up as market size falls (except the smallest markets, which drop again). Generally, the bigger the staff, the more likely a station is to be involved in some sort of cooperative arrangement. CBS stations were more likely to be involved in cooperative ventures than all the other affiliates, and they were especially likely to be involved with local radio (which is now a corporate strategy among CBS owned stations). About two-thirds of the "other" category involved radio or cable.

Cooperative ventures rose substantially during the severe economic downtown in the last few years. It will be interesting to see if a reviving economy and revenue growth leads to fewer cooperative arrangements.

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Information | Helicopter | Pool video | Other |
| All TV | 78.5%  | 10.2%  | 35.5%  | 18.3%  |
| Market |  |  |  |  |
| 1 - 25 | 65.7  | 42.9  | 65.7  | 14.3  |
| 26 - 50 | 72.4  | 13.8  | 31.0  | 27.6  |
| 51 - 100 | 86.7  | 0  | 28.9  | 15.6  |
| 101 - 150 | 83.3  | 0  | 25.0  | 16.7  |
| 151+ | 79.3  | 0  | 31.0  | 20.7  |

All the categories here more than doubled since last year. The percentage sharing information was slightly lower for the biggest stations in the biggest markets, but otherwise there was little difference no matter how I broke down the categories. Pool video varied more. Fox affiliates were a little more likely to cooperate there, and ABC affiliates were less likely to do so. Helicopter was market specific, not surprisingly. Almost 43% of top 25 markets report sharing a chopper. That dropped to just under 14% in markets 26 - 50, but the survey doesn't pick up whether that's because there's less sharing or fewer choppers. Most of the "other" category involved content, but news directors were more specific -- most often noting video and packages.

A year ago, we asked stations not involved in cooperative arrangements 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. There's no evidence in this year's survey that those plans resulted in new arrangements. This year, almost a quarter (24.8%) say they're planning or discussing a new cooperative arrangement. Most likely: bigger markets and CBS and Fox affiliates.

**Stations are running information on their digital channels.**

This again, is an area of greater expectation than reality.

Stations running material on another digital channel that news director oversees

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | All news channel | Weather channel | Other | No |
| All TV | 3.4%  | 26.6%  | 24.6%  | 51.2%  |
| Market: |  |  |  |  |
| 1 – 25 | 4.4  | 20.0  | 15.6  | 60.0  |
| 26 - 50 | 6.5  | 32.6  | 30.4  | 39.1 |
| 51 - 100 | 6.8  | 33.8  | 33.8  | 37.8  |
| 101 - 150 | 0  | 29.7  | 17.6  | 58.1  |
| 151+ | 0  | 13.0  | 24.1  | 63.0  |

A year ago, almost 46% of news directors noted they were involved in plans for content on the station's digital channels. A year later, the evidence says that few of those plans went anywhere. Some of the numbers are up a little (weather and other), but some are down a little (all news and whether they're doing anything at all). Interestingly, 8.3% of stations with 51+ news employees are now running an all news channel. More than a quarter of TV stations are running a weather channel. Most often, "other" meant another station on another digital channel; just behind that was news but not all news. Well behind were entertainment and sports. Fox stations are markedly less likely to be involved in these things overall and in each area specifically. Stations in the West also tended to be less involved than stations in other areas.

**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 | 69.9%  | 30.1%  |
| Market: |  |  |
| 1 - 25 | 63.6  | 36.4  |
| 26 - 50 | 82.6  | 17.4  |
| 51 - 100 | 84.0  | 16.0  |
| 101 - 150 | 64.1  | 35.9  |
| 151+ | 52.8  | 47.2  |

Three-screen numbers are virtually unchanged from a year ago. The bigger the news department, the more likely the station has a 3-screen approach. Network affiliation made no difference, although non-affiliates seldom had 3-screen approaches. Geography made little difference.

Overwhelmingly, news directors ranked the order of importance as 1: TV; 2: Online; 3: Mobile. Only a handful of news directors deviated from that sequence.

**High Definition**

Percentage of stations broadcasting local news in high definition

|  |  |
| --- | --- |
|  | Percent Yes |
| All TV | 40.3%  |
| Market: |  |
| 1 - 25 | 68.2 |
| 26 - 50 | 61.7  |
| 51 - 100 | 48.7  |
| 101 - 150 | 24.7  |
| 151+ | 9.3  |

Overall, this year's percentage of stations broadcasting in high definition is up 7% from a year ago. As in the past, the bigger the market and the bigger the station, the more likely it is to broadcast in HD. Stations with 51+ news staff report 81.7% are broadcasting in HD.

**One-Man-Bands 2011 -2010 Update**

Call them one-man-bands (admittedly old school), multimedia (MMJ) or backpack journalists -- their use has been growing over the last four years -- but not as much as a lot of people seem to think.

The use of one-man-bands (multimedia or backpack journalists) rose about 3.7% in the last year. That's a slightly higher rate of growth than a few years ago. Overall, in the four years that I've tracked this, the use of one-man-bands has increased 3-4% a year.

Percentage of TV Newsrooms Reporting Using One-Man-Bands - 2011

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Yes, Mostly Use OMB | Yes, Use Some OMB | Yes, But Not Much Use | No, Do Not Use |
| All TV | 35.6%  | 32.4%  | 16.0%  | 16.0%  |
| Market size: |  |  |  |  |
| 1-25 | 16.7  | 35.4  | 14.6 | 33.3  |
| 26-50 | 10.2  | 38.8  | 28.6  | 22.4  |
| 51-100 | 21.8  | 46.2  | 16.7  | 15.4  |
| 101-150 | 53.1  | 21.0  | 16.0  | 9.9  |
| 151+ | 67.9  | 21.4  | 5.4  | 5.4  |
| Staff size: |  |  |  |  |
| 51+ | 6.7  | 40.0  | 25.0  | 28.3  |
| 31-50 | 20.8  | 40.3  | 23.6  | 15.3  |
| 21-30 | 40.4  | 32.7  | 13.5  | 13.5 |
| 11-20 | 69.2  | 21.2  | 5.8  | 3.8  |
| 1-10 | 65.6  | 12.5  | 9.4  | 12.5 |

In the last year, the biggest change came in the top 50 markets, where we've seen 10-15 point drops in the "not much" category and a corresponding increase in the "use some" grouping. Other than stations in the Northeast being much less likely to have one-man-bands than stations elsewhere, there are no big differences by geography or network affiliation.

This year, for the first time, I asked how many one-man-bands a station employed.

How many OMBs do you employ? 2011

|  |  |  |
| --- | --- | --- |
|  | Average | Median |
| All TV | 4.5 | 3.5 |
| Markets 1-25 | 4.6 | 2 |
| Markets 26-50 | 3.2 | 2 |
| Markets 51-100 | 3.8 | 3 |
| Markets 101-150 | 5.0 | 4 |
| Markets 151+ | 5.8 | 5 |
| Staff size |  |  |
| 51+ | 4.5 | 3 |
| 31 - 50 | 4.3 | 4 |
| 21 - 30 | 6.0 | 4 |
| 11 - 20 | 4.7 | 5 |
| 1 - 10 | 3.1 | 3 |

This table gives a different dimension on how widespread the use of one-man-bands is, and the median, or midpoint of the numbers, probably gives a better picture of how the typical TV station operates.

These numbers are very much market-dependent. The typical station in markets 1 - 50 has 2 one-man-bands. In markets 51 - 100, there are three. Markets 101 - 150 have four; and markets 151+ come in at five.

I also asked what the one-man-bands did before they were one-man-bands. Most often, they were either reporters or in college. Less often, they were photographers. Even less often, they were something else. But the answer varied by market size and staff size. In the largest markets and in newsrooms with the largest staff sizes, OMBs were most likely to have been reporters and then photographers. In markets 101+, OMBs were a little more likely to have been college students than reporters.

Almost 43% (42.9%) said the use of OMBs changed who they hired; 38.1% said it didn't change, and 19% said it did sometimes. Not surprisingly, generally, the smaller the market and the smaller the station, the less likely that the use of OMBs changed who they hired. Many -- if not most -- of them have always hired one-man-bands.

If the use of one-man-bands has changed how a station hires, we asked how? All told, 149 news directors answered that question. Over 40% wrote about new and more skills that the people hired must bring to the job. Almost 29% specifically noted that hires had to know how to shoot or how to shoot and edit. Several news directors mentioned that must want to shoot and edit or get involved with various new media skills. Some news directors simply noted that all future hires would be OMBs, and a number of news directors also talked of looking for web skills.

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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.