**The evolving TV news business isn't evolving as much anymore**

by Bob Papper

* A more stable news business environment
* Cooperative ventures common but stable
* Where new technologies are heading this year in TV and radio

The latest RTDNA/Hofstra University Survey continues to show that the TV news business isn't limited to TV anymore. But the numbers also show a stabilization in the reach of a TV newsroom. Still, more than three-quarters (75.5%) 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 – 2012

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Another local TV station | TV in another market | Cable TV channel | Local radio | Website not your own | Mobile device | Other |
| All TV | 23.6%  | 12.7%  | 8.6%  | 43.3%  | 10.2%  | 41.1%  | 8.9%  |
| Big four affiliates | 24.7  | 12.5  | 9.1  | 44.3  | 10.5  | 43.2  | 9.1  |
| Other commercial  | 5.6  | 22.2  | 0  | 27.8  | 5.6  | 27.8  | 11.1  |
| Market size: |  |  |  |  |  |  |  |
| 1-25 | 24.1  | 13.8  | 15.5  | 36.2  | 17.2  | 37.9  | 1.7  |
| 26-50 | 20.0  | 7.5  | 10.0  | 35.0  | 7.5  | 32.5  | 12.5  |
| 51-100 | 25.0  | 13.0  | 6.5  | 46.7  | 9.8  | 47.8  | 12.0  |
| 101-150 | 26.9  | 7.7  | 3.8 | 42.3  | 6.4  | 38.5  | 7.7  |
| 151+ | 17.4  | 23.9  | 10.9  | 54.3  | 10.9  | 43.5  | 10.9  |

The likelihood of stations being involved in running content on other media tends to go up as market size drops. In the top 50 markets, 68.3% of stations run content on other media. In markets 51+, that percentage rises to 79.0%.

But trying to discern trends in this category is becoming increasingly difficult. Last year, most numbers were down slightly -- including mobile. I assumed that was an anomaly that would be corrected this year. Not the case. Half of these numbers are down again, albeit marginally, and mobile is among those. Overall, there are really no big changes up or down, but that's a change from a few years ago as more and more stations expanded into more and more areas. The expansion is apparently over, and TV news expansion into other areas appears to have stabilized. At least for now. There are really no consistent sub-groups based on market size or staff size, affiliation or geography. "Other" was split fairly evenly among newspaper, web-related and digital channels.

**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. Still, a majority 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 | 21.2%  | 25.2%  | 23.8%  | 4.6%  | 47.5%  |
| Market |  |  |  |  |  |
| 1 - 25 | 47.5  | 27.9  | 19.7  | 4.9  | 31.1  |
| 26 - 50 | 30.6  | 40.8  | 16.3  | 6.1  | 40.8  |
| 51 - 100 | 9.8  | 28.4  | 27.5  | 5.9  | 45.1  |
| 101 - 150 | 14.3  | 21.4  | 23.8  | 3.6 | 57.1  |
| 151+ | 14.3  | 6.1  | 28.6  | 2.0  | 63.3  |

Last year I noted that cooperative ventures had been growing during a down or uncertain economy ... and that it would be interesting to see how they hold up as the economy improves. Well, the evidence suggests that they're shrinking. Another TV station, newspaper and local radio all fell from last year, although not much. "Other" went up slightly, and "no" (not involved in a cooperative venture) rose by 6.5%.

Both the amount of cooperative ventures and the kind vary by market size. "Another TV station" is more than twice as likely in the two largest market sizes (1 - 50) compared to others, while cooperative ventures with a radio station tend to go up as market sizes fall. Cooperative ventures with a local newspaper rose for the top 50 markets, but it fell by 6 - 8 points in all the other market sizes. In the past, cooperative ventures were more likely in larger markets and bigger shops than smaller ones, and that is dramatically more true this year than in the past. Fox affiliates were much more likely than any other affiliates to be involved with another TV station. "Other" was mostly a mix of websites and cable.

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Information | Helicopter | Pool video | Other |
| All TV | 81.6%  | 15.1%  | 33.6%  | 14.5%  |
| Market |  |  |  |  |
| 1 - 25 | 67.6  | 48.6  | 51.4  | 21.6  |
| 26 - 50 | 70.8  | 20.8  | 41.7  | 4.2  |
| 51 - 100 | 91.1  | 0 | 26.7  | 13.3  |
| 101 - 150 | 93.1  | 0  | 27.6  | 10.3  |
| 151+ | 82.4  | 0  | 11.8  | 23.5  |

This area, too, has largely stabilized. Information went up slightly; pool video and "other" both dropped. Helicopter rose from 10 to 15%, and now almost half of all top 25 market stations that are sharing are sharing a chopper. The percentage also rose for markets 26 - 50. "Other" was most often video, vosots, packages and live shots as well as web related and then a few scattered other areas.

Almost a quarter (24.8%) of stations not involved in a cooperative news gathering or coverage arrangement reported that they were planning or discussing such an arrangement. But an even higher number (28.6%) said that last year, and there's little evidence that much ever came of it.

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

This has also been an area of greater expectation than reality.

Stations running material on another digital channel that news director oversees 2012

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | All news channel | Weather channel | Other | No |
| All TV | 5.1%  | 19.9%  | 26.3%  | 55.9%  |
| Market: |  |  |  |  |
| 1 – 25 | 13.2  | 18.9  | 20.8  | 56.6  |
| 26 - 50 | 0  | 20.0  | 32.5  | 52.5 |
| 51 - 100 | 4.7  | 23.5  | 31.8  | 50.6  |
| 101 - 150 | 4.2  | 23.6  | 20.8  | 56.9  |
| 151+ | 2.1  | 8.5  | 25.5  | 66.0  |

In the last year, there has been growth in all news digital channels, from 3.4 to 5.1%. Weather is down by 7%; "other" is up slightly, and "no" is up almost 5% from a year ago. All news channels now show up in markets 101+; they didn't until this year. The percentages for all news channels fell among markets 26 - 100, but all news channels in the top 25 tripled in the last year. NBC and then ABC affiliates are most likely to operate all news channels. Weather channels dropped among all groups. "Other" included 35 various affiliate stations (CW, MyNet, MeTV, RTV, etc.). Six noted various news or newscasts on another digital channel or channels. Four noted sports, and a couple noted an independent station or just working on development plans.

Three years ago, quite a few stations expected to be running other operations, including all news, on their extra digital channels. While there has been some movement, it's clear that many of those plans have either been dropped or slowed down.

**TV stations have a 3-screen approach to news**

Stations and a 3-screen -- on air, online, mobile -- approach to news - 2012

|  |  |  |
| --- | --- | --- |
|  | Yes | No |
| All TV | 82.2%  | 17.8%  |
| Market: |  |  |
| 1 - 25 | 78.4  | 21.6  |
| 26 - 50 | 87.5  | 12.5  |
| 51 - 100 | 85.5  | 14.5  |
| 101 - 150 | 83.1  | 16.9  |
| 151+ | 73.8  | 26.2  |

After little change last year, the number of stations involved in a 3-screen approach to news has again jumped significantly -- up over 12% since last year. Generally, the bigger the newsroom, the more likely that the station has a 3-screen approach to news. For all groupings, the ranking continues to be TV number 1 ... web number 2 ... and mobile number 3.

In a new question, I asked whether news directors consider the tablet a 4th screen. Overall, news directors are split pretty evenly on the question. Forty-five percent said yes. Just over 41% said no. Almost 14% said they didn't know.

**High Definition**

Percentage of stations broadcasting local news in high definition - 2012

|  |  |  |
| --- | --- | --- |
|  | Yes | No |
| All TV | 60.1%  | 39.9% |
| Market: |  |  |
| 1 - 25 | 83.0  | 17.0 |
| 26 - 50 | 72.5  | 27.5 |
| 51 - 100 | 71.6  | 28.4 |
| 101 - 150 | 44.6  | 55.4 |
| 151+ | 26.1  | 73.9 |

The percentage of stations running local news in HD grew by almost 20% in the last year. All categories went up, although markets 51 - 100 grew the most, and are now just behind markets 26 - 50.

**New Technology - 2012**

A new question this year asked news directors what technology they're looking to purchase this year. A total of 235 news directors answered that question. Just over a third of the news directors said video-over-cellular technology like LiveU or TVU. Half that number noted new portable/HD cameras. Thirty noted some sort of HD/studio/control room upgrade. At about half as many as that, the next group included portable editors, desktop editing, new cell phone technology, weather and iPads. Next came server/archive/storage, web-related, and traffic. Then it was one or two for a bunch of other things.

**One-Man-Bands - 2012 Update**

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

Percentage of TV Newsrooms Reporting Using One-Man-Bands - 2012

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Yes, Mostly Use OMB | Yes, Use Some OMB | Yes, But Not Much Use | No, Do Not Use |
| All TV | 39.3%  | 30.5%  | 16.1%  | 14.1%  |
| Market size: |  |  |  |  |
| 1-25 | 18.2  | 23.6  | 27.3  | 30.9  |
| 26-50 | 25.0  | 25.0  | 32.5  | 17.5  |
| 51-100 | 26.1  | 50.0  | 10.2  | 13.6  |
| 101-150 | 56.0  | 22.7  | 13.3  | 8.0  |
| 151+ | 74.5  | 19.1  | 4.3  | 2.1  |
| Staff size: |  |  |  |  |
| 51+ | 7.7  | 40.0  | 27.7  | 24.6  |
| 31-50 | 26.0  | 45.5  | 13.0  | 15.6  |
| 21-30 | 57.9  | 26.3  | 8.8  | 7.0  |
| 11-20 | 80.5  | 7.3  | 9.8  | 2.4  |
| 1-10 | 71.4  | 9.5  | 9.5  | 9.5  |

I've been tracking the use of one-man-bands (multimedia or backpack journalists) for five years now. Generally, the use of OMBs has gone up about 3% a year, and that's about right for this year as well. The biggest growth has been in markets 26 - 50, where many of the stations that a year ago said they used one man bands "some" have moved into the use "mostly" category. But the changes aren't at all uniform. The biggest stations (51+ news staffers) are almost unchanged from a year ago, and the movement toward more and more one man bands appears a bit more erratic and a little slower this year than in the past.

**Radio Technology**

Periodically, we ask radio news directors about the use of digital technology in the newsroom.

Which of the following technologies are you using on a daily basis in the newsroom?

|  |  |
| --- | --- |
| Digital audio recording | 94.6% |
| Digital editing and mixing | 83.0 |
| Digital or cellular phones | 68.7 |
| Field laptops for editing | 32.0 |
| MP3 | 78.9 |

Everything except field laptops for editing went up about 30 points compared to the last time I checked two years ago. Field laptops went up about 20 points. There were relatively minor differences between commercial and non-commercial stations. Commercial stations were more likely to use digital or cell phones and MP3, but non-commercial were more likely to use field laptops for editing. The best predictor of digital technology was staff size. The bigger the staff, the more digital technologies the station used. Market size made relatively little difference. Groups tended to have a little more digital technology, but the difference was small. Stations in the Northeast tended to lag the rest of the country.

The overall average of news material gathered digitally was just shy of three-quarters, but that's deceptive. A handful of laggards brought down the average. Overwhelmingly, stations gathered almost all their material digitally. The smallest stations in the smallest markets brought down the average.

Just over three-quarters of radio news material was mixed and edited digitally, but, again, most stations did all their mixing and editing digitally, with a few small operations bringing down the average.

More than three-quarters of all news material was played back or aired digitally. Again, most stations were all digital.

A new question this year asked what new technology the station was looking at this year:

None/nothing 37.7%

More or all digital equipment 18.0

Internet-related 13.9

Studio equipment 7.4

Cameras 6.6

Not sure 6.6

Digital phones 5.7

Mobile-related 4.9

Transmitter 2.5

HD 2.5

One news director was hoping for iPads ... and another was hoping that his station would stay on the air. The percentages add up to a little more than 100 percent because a few news directors noted more than one thing.

***Bob Papper is the Lawrence Stessin Distinguished Professor of Journalism 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 Communication at Hofstra University and the Radio Television Digital News Association.***

**About the Survey**

The RTDNA/Hofstra University Survey was conducted in the fourth quarter of 2011 among all 1,735 operating, non-satellite television stations and a random sample of 3,000 radio stations. Valid responses came from 1,238 television stations (71.4%) and 260 radio news directors and general managers representing 743 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.