**What's new online for TV and radio**

by Bob Papper

* The most important new thing online
* A change in TV and radio website sales
* New profitability numbers

With web numbers stabilizing in the RTDNA/Hofstra University Annual Survey, it was time to learn what stations were doing that was new and different. This past year's survey asked more open-ended questions than ever before. And I got more answers than ever before, too.

What's the most important new thing you're doing online?

I've asked the question before, but I've never received so many -- or so many different -- answers. The top answer was simply more social media and more emphasis on social media. But that's really just an umbrella for the many specifics that about 200 news directors noted.

Just behind that overall remark on social media came more content, more emphasis on content and more and better storytelling online. In fact, that was the theme of many of the answers, which tended to talk about adding photos and videos, slideshows and user-generated content, chats and more web-only content.

This was also a big year for website redesign, with quite a few news directors noting new, upgraded or re-designed websites. And that's apart from the many who talked about redesigning their mobile sites and even more who redesigned their Facebook pages -- especially to enhance interaction and story referrals.

Quite a few stations added streaming newscasts -- in some cases all of the station's newscasts -- and nearly as many stations added or expanded the live streaming of news events. Some just added more streaming video, and quite a few made sure the experience was good for mobile users, too.

A lot of stations added mobile and tablet apps. Some of those were for redesigned mobile websites and more and more for specific content, including weather, local sports, restaurant inspection reports, sex offender locators and more.

A fair numbers of stations also made behind the scenes changes. There was the technical side, with new content management software, new servers and other backbone improvements, and there was also an increase in people hired specifically to oversee or expand social media and online content. In some cases, this was simply a shifting of existing staff rather than staff additions.

A few other specific things caught my eye. Several stations made special and apparently long-lasting changes to political coverage online. One station noted a daily talk show online, but my favorite might be the station that added "morning home delivery" for people in the community to replace the newspaper, which was cutting back on production.

Radio's list tended to parallel TV. Well out ahead: More and/or improved news content. Well behind that came streaming ... which had a modest lead over a new/redesigned and/or relaunched website. Farther back were notes on Facebook, video and sports. Then came random mentions for Twitter, mobile, social media, blogs and podcasts.

Note that 28.1% of radio news directors answered nothing; 28.2% of TV news directors said the same.

Who has web sites? 2013

|  |  |  |  |
| --- | --- | --- | --- |
| All TV | 100% | All Radio | 92.2% |
| Market Size |  | Market Size |  |
| 1 - 25 | 100 | Major | 96.0 |
| 26 - 50 | 100 | Large | 100 |
| 51 - 100 | 100 | Medium | 95.0 |
| 101 - 150 | 100 | Small | 81.2 |
| 151+ | 100 |  |  |

I didn't find a single TV station (that runs local news) that doesn't have a website. Second year in a row for that.

Radio went back down the four points it had gone up a year ago. Smaller stations with smaller staffs were less likely than others to have a website, but even some very large operations reported not having one.

How many web sites include local news? 2013

|  |  |  |  |
| --- | --- | --- | --- |
| All TV | 100% | All Radio | 81.1% |
| Market Size |  | Market Size |  |
| 1 - 25 | 100 | Major | 82.6 |
| 26 - 50 | 100 | Large | 71.9 |
| 51 - 100 | 100 | Medium | 89.1 |
| 101 - 150 | 100 | Small | 76.3 |
| 151+ | 100 |  |  |

In TV, every website includes local news. That's been true for the last three years. Radio numbers are largely unchanged from a year ago.

Elements of local news web sites - 2013

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| TV | Text | Still Pics | Audio | Strmng Audio | Live Cam | Nws Vid | Live Nwscsts | Rcrded Nwscsts | Blogs | Pdcsts | User assmbl | Mobile related | User gnrtd | Event cal | Other |
| All TV: | 90.2% | 93.9% | 53.7% | 33.8% | 60.1% | 96.3% | 44.6% | 31.4% | 46.3% | 9.1% | 2.7% | 64.2 | 65.5% | 68.9% | 2.4% |
| Mrkts 1 - 25 | 83.0 | 88.7 | 66.0 | 47.2 | 60.4 | 96.2 | 60.4 | 30.2 | 62.3 | 7.5 | 3.8 | 56.6 | 66.0 | 67.9 | 0 |
| Mrkts 26 - 50 | 92.9 | 95.2 | 66.7 | 40.5 | 71.4 | 95.2 | 47.6 | 33.3 | 45.2 | 19.0 | 0 | 59.5 | 61.9 | 54.8 | 4.8 |
| Mrkts 51 - 100 | 92.5 | 93.8 | 56.2 | 36.2 | 75.0 | 95.0 | 48.8 | 30.0 | 48.8 | 8.8 | 1.2 | 70.0 | 75.0 | 77.5 | 1.2 |
| Mrkts 101 - 150 | 93.0 | 95.8 | 42.3 | 23.9 | 52.1 | 98.6 | 36.6 | 33.8 | 42.3 | 7.0 | 4.2 | 62.0 | 67.6 | 67.6 | 0 |
| Mrkts 151+ | 88.0 | 96.0 | 42.0 | 24.0 | 38.0 | 96.0 | 30.0 | 30.0 | 32.0 | 6.0 | 4.0 | 70.0 | 50.0 | 70.0 | 8.0 |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Radio | Text | Still Pics | Audio | Strmng Audio | Live Cam | Nws Vid | Live Nwscsts | Rcrded Nwscsts | Blogs | Pdcsts | User Assmbl | Mobile related | User gnrtd | Event cal | Other |
| All Radio: | 82.4% | 64.7% | 66.4% | 58.8% | 9.2% | 28.6% | 12.6% | 34.5% | 22.7% | 34.5% | 0 | 14.3% | 4.2% | 43.7% | 3.4% |
| Major Market | 78.9 | 73.7 | 68.4 | 68.4 | 15.8 | 47.4 | 5.3 | 21.1 | 57.9 | 52.6 | 0 | 31.6 | 0 | 42.1 | 0 |
| Large Market | 95.7 | 73.9 | 78.3 | 65.2 | 13.0 | 34.8 | 8.7 | 30.4 | 39.1 | 39.1 | 0 | 17.4 | 0 | 65.2 | 8.7 |
| Medium Market | 72.9 | 56.2 | 66.7 | 50.0 | 8.3 | 18.8 | 20.8 | 45.8 | 35.4 | 35.4 | 0 | 8.3 | 8.3 | 35.4 | 4.2 |
| Small Market | 89.7 | 65.5 | 55.2 | 62.1 | 3.4 | 27.6 | 6.9 | 27.6 | 17.2 | 17.2 | 0 | 10.3 | 3.4 | 41.4 | 0 |

In TV, there were increases in mobile (up about 8.5) and small increases in live cameras, live newscasts and user-generated content. There were small drops in blogs and event calendars. Blogs have been dropping fairly steadily for the last few years.

"Other" is extremely small this year in TV, and most of what stations listed as other (like streaming newscasts and streaming video) really go under other headings.

Radio websites appear largely unchanged, with two exceptions. Streaming audio rose about 9 points from last year. That was fueled primarily by small markets and secondarily by large ones. And a growth in large market non-commercial podcasts led the overall podcast percentage up by about 8 points from a year ago.

**Selling stuff on the web**

Fewer stations are selling stuff on TV station websites -- 27.6% -- down from 31% last year. With the top markets, 1-25, and the smallest newsrooms, 1 - 10, running behind all the others.

The most common things that stations mention selling online are local, daily deals and coupons. Those two were half the list. Stations are also selling sponsorships of specific sections of the website -- like weather or local sports, and stations are selling what one news director described as "advertorial" expert videos and another described as advertiser placement of experts. Some are running auctions. Among the items being sold: books, gift certificates, DVDs of news stories, TV antennas, weather apparel and one runs a "general store" where it sells general merchandise.

The percentage of radio stations that sell things on the web also fell slightly from last year's 22.4% to this year's 20.7%. Relatively few non-commercial stations sold things on the web, and the best predictor of web sales was number of local stations in a group. The more stations, the more likely that the stations sold things online.

Most of the radio comments about what the station sold on the website referenced ads -- in general, along with banners, and classified. Some mentioned coupons and gift certificates. A few noted station clothing, t-shirts and swag.

**Is the station involved in any local Groupon/Social Living type offerings?**

Typically, these usually involve half-price offers with the proceeds commonly split between the station and the retailer, but the deals can vary quite a bit. In TV, participation in these offerings plunged from last year's 44.5% to 31.5% this year. Again, small newsrooms in the biggest markets were the least likely to be involved. Independents and ABC affiliates were less likely than others to participate, while stations in the Northeast were a little more likely to be involved.

Radio dropped as well. Only half as many (8.2% vs. 15%) radio stations said they were involved in any Groupon/Social Living type offerings this year compared to last year.

**Paywalls**

Two TV stations reported having a paywall -- leaving 99.3% of TV station websites free and open. For those stations without paywalls, I asked if they were considering it. Just over 5% said yes. That's the same as last year -- which clearly didn't happen. The few considering paywalls were scattered across all groups -- except the Northeast, where no stations said they were considering a paywall.

Radio was the same as last year, with 96.4% reporting no paywall (versus 96.6% a year ago). Of those without paywalls, 96.8% said they are not considering one. That's also about the same as a year ago (97.6%). All of the stations considering paywalls were in markets below 250,000 population, and most were standalone stations.

**Apps**

The percentage of TV stations with apps rose almost 10 points to 87.8% this year. The bigger the staff, the more likely to have an app; market size was irrelevant. The typical (median) station had 2, and the average, at 1.9, was almost identical. Again, staff size accounted for most of the difference. No station had more than 10 apps. Only 3.3% of TV stations charged for apps; that's half the number that charged a year ago. Most of those were in the biggest markets, and more were ABC affiliates than anything else.

In radio, the average station had 0.6 apps. That's up from 0.4 last year, but the median (typical) remained at 0. Only in the very biggest markets were a majority of stations likely to have an app. As with last year, no radio station charged for an app.

Percentage of web content that's only on the web - 2013

|  |  |
| --- | --- |
| All TV | 23.8% |
| Markets 1-25 | 27.0 |
| Markets 26-50 | 23.8 |
| Markets 51-100 | 25.4 |
| Markets 101-150 | 21.1 |
| Markets 151+ | 22.7 |
|  |  |
| Staff size |  |
| 51+ | 26.3 |
| 31 - 50 | 26.0 |
| 21 - 30 | 20.4 |
| 11 - 20 | 23.3 |
| 1 - 10 | 19.0 |
|  |  |
| All Radio | 14.7% |
| Major market | 9.3 |
| Large market | 18.5 |
| Medium market | 13.5 |
| Small market | 16.6 |

For the second year in a row, the amount of web only content actually went down slightly from the year before. For both TV and radio. Last year, I noted that I was surprised that the radio numbers were as high as they were. This year, they're not. Overall, radio is down 10 points from a year ago, and every market size dropped in percentage.

Percentage of web content that's user-generated - 2013

|  |  |
| --- | --- |
| All TV | 8.0% |
| Markets 1-25 | 5.2 |
| Markets 26-50 | 7.7 |
| Markets 51-100 | 9.4 |
| Markets 101-150 | 7.5 |
| Markets 151+ | 9.7 |
|  |  |
| Staff size |  |
| 51+ | 7.2 |
| 31 - 50 | 10.2 |
| 21 - 30 | 7.9 |
| 11 - 20 | 7.8 |
| 1 - 10 | 4.6 |
|  |  |
| All Radio | 3.2% |
| Major market | 3.1 |
| Large market | 2.8 |
| Medium market | 4.3 |
| Small market | 2.0 |

User-generated content in TV is another question that didn't move from last year. Overall, the radio number for user-generated content is half what it was last year. Again, every market size went down in percentage.

How many people work on the web? 2013

|  |  |  |  |
| --- | --- | --- | --- |
|  | Full-time | Part-time | Total |
| All TV | 2.1 | 0.8 | 2.8 |
| Markets 1-25 | 3.8 | 0.8 | 4.7 |
| Markets 26-50 | 2.4 | 0.9 | 3.2 |
| Markets 51-100 | 1.9 | 0.9 | 2.8 |
| Markets 101-150 | 1.4 | 0.7 | 2.2 |
| Markets 151+ | 1.1 | 0.6 | 1.7 |
|  |  |  |  |
| All Radio | 0.7 | 1.1 | 1.8 |
| Major Market | 1.0 | 0.6 | 1.6 |
| Large Market | 1.1 | 1.2 | 2.2 |
| Medium Market | 0.5 | 1.1 | 1.6 |
| Small Market | 0.6 | 1.2 | 1.8 |

This year, TV stations report that they're up about a fifth of a person over last year, but that doesn't line up with what news directors said last year. As usual. Overall, full time web staff is identical to last year, and part time help is down slightly.

In radio, news directors reported that web staffing dropped slightly from the year before. They're right, but the slide was small.

Do other staffers help on the web? 2013

|  |  |
| --- | --- |
| All TV | 71.6% |
| Markets 1-25 | 51.7 |
| Markets 26-50 | 61.6 |
| Markets 51-100 | 74.3 |
| Markets 101-150 | 80.2 |
| Markets 151+ | 82.3 |
|  |  |
| All Radio | 51.9% |
| Major Market | 54.2 |
| Large Market | 35.2 |
| Medium Market | 64.3 |
| Small Market | 46.4 |

Last year, I reported that these numbers on staff participation on the website appear to have plateaued. This year, they've dropped about 7 points in TV ... with all market sizes falling. Not a lot, but it's a noticeable change.

Radio numbers fell even more than TV -- dropping from almost 68% last year to just shy of 52%. Every market size contributed to the decrease, and there were only minor differences looking at stations in a group, region, etc.

News director role with the web site - 2013

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | In Charge Overall | In Charge of News Content Only | Other | No Management Role |
| All TV | 22.4% | 71.0% | 3.4% | 3.1% |
| Markets 1-25 | 23.1 | 63.5 | 5.8 | 7.7 |
| Markets 26-50 | 22.0 | 65.9 | 7.3 | 4.9 |
| Markets 51-100 | 24.1 | 74.7 | 1.3 | 0 |
| Markets 101-150 | 22.5 | 71.8 | 2.8 | 2.8 |
| Markets 151+ | 19.1 | 76.6 | 2.1 | 2.1 |
|  |  |  |  |  |
| All Radio | 15.0% | 57.9% | 22.1% | 5.0% |
| Major Market | 14.3 | 66.7 | 14.3 | 4.8 |
| Large Market | 10.7 | 53.6 | 25.0 | 10.7 |
| Medium Market | 13.2 | 66.0 | 17.0 | 3.8 |
| Small Market | 21.1 | 44.7 | 31.6 | 2.6 |

Most of these numbers are similar to a year ago as far as TV is concerned.

In radio, the biggest change is the growth of "no role" for news directors -- up from last year's 7.5% to this year's 22.1%. That might be a survey anomaly, but that category grew by 4 points a year ago, so it does suggest a trend. In charge overall fell by 6 and "other" fell by 11.

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 - 2013

|  |  |  |
| --- | --- | --- |
|  | Page Views (in millions) | Unique Visitors (in thousands) |
| All TV | 3.67 | 459.5 |
| Market Size |  |  |
| 1-25 | 7.60 | 811.5 |
| 26-50 | 6.08 | 679.9 |
| 51-100 | 4.04 | 490.9 |
| 101-150 | 1.37 | 250.3 |
| 151+ | 1.50 | 231.5 |

TV page views rose slightly from last year, but unique visitors fell. All market sizes went up in page views except 101 - 150, and all market sizes fell in unique visitors except 151+.

Radio web traffic numbers are reported by too few radio news directors for me to break down the numbers by specific groups, but the overall numbers should provide some guidance. Overall, radio traffic was 582,600 page views in a month and 152,800 unique visitors. As with TV, that's down in page views from a year ago, but slightly up in unique visitors.

Is the Website Making Money? 2013

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Profit | Breaking Even | Loss | Don’t Know |
| All TV | 39.1% | 7.8% | 7.8% | 45.2% |
| Markets 1-25 | 29.8 | 4.3 | 14.9 | 51.1 |
| Markets 26-50 | 42.5 | 10.0 | 2.5 | 45.0 |
| Markets 51-100 | 51.3 | 7.7 | 5.1 | 35.9 |
| Markets 101-150 | 32.8 | 9.0 | 9.0 | 49.3 |
| Markets 151+ | 34.7 | 8.2 | 8.2 | 49.0 |
|  |  |  |  |  |
| All Radio | 10.9% | 15.2% | 17.4% | 56.5% |
| Major Market | 25.0 | 20.0 | 10.0 | 45.0 |
| Large Market | 6.7 | 3.3 | 16.7 | 73.3 |
| Medium Market | 9.6 | 11.5 | 17.3 | 61.5 |
| Small Market | 8.3 | 27.8 | 22.2 | 41.7 |

The bigger the newsroom, the more likely the station made a profit on the web, peaking at almost 51% profitability for stations with newsrooms bigger than 51. Given that ABC affiliates were less likely than others to be involved with Groupon types of things, it's probably no surprise that ABC affiliates were also less likely to make money on the web.

Radio profitability numbers slid (again) from the year before. Other than the biggest markets, web profitability was hard to find in radio.

Profitability of station websites over time

At 39.1%, the level of TV website profitability is slightly behind last year's record high. Radio continues its up and down ride.

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**About the Survey**

The RTDNA/Hofstra University Survey was conducted in the fourth quarter of 2012 among all 1,732 operating, non-satellite television stations and a random sample of 3,000 radio stations. Valid responses came from 1,377 television stations (79.5%) and 217 radio news directors and general managers representing 575 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.