An introductory note, if you will. 2014 marks my 20th year conducting the

RTDNA (before that, RTNDA) Annual Survey. First at Ball State University and now at Hofstra University. It has been my privilege to do this, and I want to thank RTDNA, Ball State and Hofstra for the support and opportunity to keep this going. Most of all, I want to thank all of you who spend what I know is way too much time poring over the way too many questions that I ask on this survey. Thank you.

- Bob Papper

**What's new online in 2014 for TV and radio**

**by Bob Papper**

* The most important new thing online
* TV and radio websites diverge on sales
* New profitability numbers

As web numbers have largely stabilized in the RTDNA/Hofstra University Annual Survey, I've shifted focus more to learn what stations are doing that's 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 love (and appreciate) that more than 200 news directors are answering this question every year. The trick is to categorize the answers in a way that makes them meaningful for people reading this.

First, the answers this year were quite different from the year before. Last year, it was all about an increased emphasis on the use of social media, then online content and website redesign.

This year, content was king. By a lot. The specifics varied from more slide shows, more web-only content, more special features, more detailed content that couldn't fit into the newscast stories, more specialized content. Just plain more content.

Noticeably behind that was a tie between live streaming and some form of reorganization of web/social media strategy, posting, philosophy, execution. Most of the live streaming involved newscasts, but quite a few news directors noted breaking news, trial coverage, local sports and a variety of other things.

Well behind that ... another cluster. Facebook-related emphasis, likes, postings ... mobile offerings and special mobile-related content ... and a variety of interactive elements. That last item included an emphasis on user-generated content, contests, and just general interaction with the audience.

In numbers well behind last year, it appears that stations that didn't redesign their websites in 2012 did it in 2013. The number of stations noting that they were focusing on Twitter was much smaller than in years past. That was followed by a handful of stations that noted that they hired people specifically for online or social media.

All told, almost three-quarters of the news directors (73.5%) said they started something important online last year.

TV news directors ... in their own words:

"A change in systems and procedures to put us in a better position to fulfill our brand and images based on extensive local viewer research."

"Adding a ton more video content ... along with short webcasts when our newscasts are pre-empted by sporting events. And, we added a share-it section for viewers to post pictures and video."

"Analyzing clicks and page views to focus on the most popular content for users."

"Creating a series of non-broadcast interstitials for online usage focusing on community (and larger) issues."

"Executed a tactical plan to expand the content of news stories on the website. As our broadcast stories had to change to avoid repetition, those changes naturally added detail and elements to the web story."

"Going BIG on the big stories -- integrating online and mobile in EVERY cast."

"Redesigned website; live streamed all newscasts and ability to provide multiple live streams on a daily basis."

"We have had an increased focus on photo galleries. They are our biggest driver of page views and unique visitors."

The percentage of new elements was a lot lower in radio, where barely a majority (54.8%) said they started something new and important online this past year. At the top of the list -- and the overwhelming winner -- more and/or better content, especially local. Nothing else even came close to half as many mentions. Well back, came a new website or new website design, followed by live streaming. Then came various aspects of social media: increases in social media presence, an emphasis on Facebook and new or expanded use of Twitter. Well back from that came more chat/interaction with the audience.

Radio news directors ... in their own words:

"Added additional content beyond stories, including web-only content."

"Building out key topic sub-sites (politics, immigration, education, etc.)."

"Hired 1.5 web producers to produce maps, graphs, etc., to accompany stories and series."

"Making sure all locally produced stories are on web."

"Positioned news on Facebook and Twitter in a way that allowed people to create conversations around it."

Who has web sites? 2014

|  |  |  |  |
| --- | --- | --- | --- |
| All TV | 100%  | All Radio | 96.3%  |
| Market Size |  | Market Size |  |
| 1 - 25 | 100  | Major | 100  |
| 26 - 50 | 100  | Large | 100  |
| 51 - 100 | 100  | Medium | 94.7  |
| 101 - 150 | 100  | Small | 95.3  |
| 151+ | 100  |  |  |

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

Radio still hasn't hit 100%, although it's higher than last year. Interestingly, there was no pattern to the random collection of radio stations without web sites -- other than that they were all in markets of a quarter million people or less.

How many web sites include local news? 2014

|  |  |  |  |
| --- | --- | --- | --- |
| All TV | 100%  | All Radio | 79.7%  |
| Market Size |  | Market Size |  |
| 1 - 25 | 100  | Major | 66.7  |
| 26 - 50 | 100  | Large | 84.6  |
| 51 - 100 | 100  | Medium | 86.8 |
| 101 - 150 | 100  | Small | 74.6  |
| 151+ | 100  |  |  |

In TV, every website includes local news. That's been true for the last four years. Radio numbers are largely unchanged from a year ago. Again, there was no pattern to the radio, although all stations that were part of groups of 6 or more stations in one market -- or had 10 or more news employees -- put local news online.

Elements of local news web sites - 2014

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| TV | Nws Vid | Still Pics | Text | Event cal | Audio | Mobile related  | User gnrtd | Live Cam | Live Nwscsts | Blogs | Strmng Audio | Rcrded Nwscsts | Pdcsts | User assmbl | Other |
| All TV: | 98.6%  | 94.7%  | 89.7%  | 72.6%  | 53.7%  | 60.9%  | 59.4%  | 58.4%  | 54.1%  | 38.4%  | 32.7%  | 28.5%  | 6.4%  | 1.8%  | 1.1%  |
| Mrkts 1 - 25 | 95.9  | 85.7  | 73.5  | 53.1  | 57.1  | 51  | 51  | 61.2  | 63.3  | 32.7  | 40.8  | 22.4  | 14.3  | 2  | 2  |
| Mrkts 26 - 50 | 100  | 91.2  | 91.2  | 79.4  | 52.9  | 70.6  | 79.4  | 76.5  | 73.5  | 52.9  | 44.1  | 29.4  | 11.8  | 0  | 0  |
| Mrkts 51 - 100 | 100  | 97.5  | 93.8  | 78.8  | 50  | 67.5  | 66.2  | 65  | 62.5  | 51.2  | 36.2  | 27.5  | 5  | 2.5  | 0  |
| Mrkts 101 - 150 | 98.6  | 98.6  | 97.3  | 71.6  | 56.8  | 58.1  | 56.8  | 52.7  | 40.5  | 24.3  | 23  | 29.7  | 2.7  | 1.4  | 2.7 |
| Mrkts 151+ | 97.7  | 95.5  | 86.4  | 79.5  | 52.3  | 56.8  | 45.5  | 38.6  | 36.4  | 34.1  | 25  | 34.1  | 2.3  | 2.3  | 0  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Radio | Text | Still Pics | Audio | Strmng Audio | Event cal | Pdcsts | Nws Vid | Rcrded Nwscsts | Blogs | Live Nwscsts | Mobile related | User gnrtd | Live Cam | User Assmbl  | Other |
| All Radio: | 85.1%  | 73.6%  | 70.2%  | 62.8%  | 42.1%  | 30.6%  | 27.3%  | 24.8%  | 19.8%  | 13.2%  | 13.2%  | 6.6%  | 1.7%  | 0  | 4.1%  |
| Major Market | 100  | 100  | 100  | 70  | 30  | 70  | 60  | 20  | 40  | 30  | 10  | 10 | 0  | 0  | 0  |
| Large Market | 90.5  | 90.5  | 81  | 66.7  | 57.1  | 33.3  | 28.6  | 19  | 14.3  | 14.3  | 28.6  | 9.5  | 0  | 0  | 0  |
| Medium Market | 80.4  | 73.9  | 65.2  | 69.6  | 47.8  | 32.6  | 30.4  | 28.3  | 23.9  | 13  | 17.4  | 4.3  | 0  | 0  | 4.3  |
| Small Market | 84.1  | 59.1  | 63.6  | 52.3  | 31.8  | 18.2  | 15.9  | 25  | 13.6  | 9.1  | 2.3  | 6.8  | 4.5  | 0  | 6.8  |

In TV, there are only three meaningful changes from a year ago. Live newscasts rose by almost 10 points. Blogs fell by about 8 points; and podcasts fell by about 3. Blogs have been steadily dropping in TV for the last several years.

There were more changes in radio websites than in TV. There were modest gains in still pictures, audio, streaming audio and user-generated content. There were drops in live cameras, blogs, and podcasts. The rest all held steady.

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

**Selling stuff on the web**

Fewer and fewer TV stations are selling stuff on station websites, 24.8%, down from 27.6% last year and 31% the year before. That cutbacks are all across the board, although CBS affiliates and stations in the Northeast are a little more likely to sell stuff online than others.

I suspect that we've been seeing a decline here because there's been more TV money recently in retransmission revenue -- without any meaningful additional investment in producing that revenue -- rather than investing resources into generating smaller dollars on the web. Look for that to change in a few years after the retransmission pot of gold starts to stabilize.

In contrast to TV, the percentage of radio stations that sell stuff on the web rose this year. Up from last year's 20.7% to this year's 24.5%. And in contrast to years past, non-commercial stations were even more likely to sell stuff online (32.6%) than commercial stations (21.2%), although those sales included memberships. Stations in the biggest markets were the most likely to sell stuff; otherwise, there were no other patterns.

As far as what radio stations are selling, top on the list was an online store or local products and services. Then came station or network branded stuff. Then ads, public radio memberships and then auctions and sponsorships.

**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 44.5% two years ago to 31.5% last year to 23.3% this year.

Only 12% of radio stations said they were involved in any local Groupon/Social Living type offerings. That's up slightly from last year's 8.2% but down from 15% two years ago.

**Paywalls**

Three TV stations reported having paywalls this year. That's a 50% increase from the two that had paywalls a year ago, but it still doesn't look like a trend. All three were outside the top 50 markets. For those stations without paywalls, I asked if they were considering it. Just over 4% said yes. That's slightly lower than last year's 5% -- which was the same as the year before. Clearly that consideration didn't materialize. The few considering paywalls were scattered across all groups, peaking with ABC affiliates at just over 7%.

Radio was the same as last year, with 97.1% reporting no paywall (versus 96.4% a year ago). Of those without paywalls, 97.6% said they are not considering one. That's also about the same as a year ago (96.8%).

**Percentage of web content that's only on the web - 2014**

|  |  |
| --- | --- |
| All TV | 22.1%  |
| Markets 1-25 | 25.1  |
| Markets 26-50 | 27.7  |
| Markets 51-100 | 23.9  |
| Markets 101-150 | 18.1  |
| Markets 151+ | 19.4  |
|  |  |
| Staff size |  |
| 51+ | 27.3  |
| 31 - 50 | 23  |
| 21 - 30 | 19.6  |
| 11 - 20 | 19  |
| 1 - 10 | 17.2  |
|  |  |
| All Radio | 21.5%  |
| Major market | 29.3  |
| Large market | 15.9  |
| Medium market | 22.9  |
| Small market | 20.9  |

I keep waiting to see these numbers go up in TV, but for the third year in a row, they're actually down from the year before. Not much ... but a little.

Radio, however moved even with TV this year ... with a 50% increase over last year. Major markets and commercial stations led the way in the increase.

**Percentage of web content that's user-generated - 2014**

|  |  |
| --- | --- |
| All TV | 7.5%  |
| Markets 1-25 | 5.7  |
| Markets 26-50 | 12.2  |
| Markets 51-100 | 7.6  |
| Markets 101-150 | 6.7  |
| Markets 151+ | 7.1  |
|  |  |
| Staff size |  |
| 51+ | 8.2  |
| 31 - 50 | 7.5  |
| 21 - 30 | 6.4  |
| 11 - 20 | 7.6  |
| 1 - 10 | 5.6  |
|  |  |
| All Radio | 5.7%  |
| Major market | 3  |
| Large market | 6.6  |
| Medium market | 6.2  |
| Small market | 5.6  |

This is another area I keep expecting to see growth ... which doesn't come. The overall number in TV is actually down half a point, although the percentages went up in the top 50 markets.

Radio went up, but the numbers remain extremely small.

**How many people work on the web? 2014**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Full-time | Part-time | Total |
| All TV | 2.0  | 1.1  | 3.1  |
| Markets 1-25 | 3.6  | 1.1  | 4.6  |
| Markets 26-50 | 2.7  | 0.6  | 3.3  |
| Markets 51-100 | 1.9  | 0.8  | 2.7  |
| Markets 101-150 | 1.3  | 1.6  | 2.9  |
| Markets 151+ | 1.5  | 1 | 2.5  |
|  |  |  |  |
| All Radio | 1  | 0.9  | 2  |
| Major Market | 1.3  | 1  | 2.3  |
| Large Market | 1  | 0.7  | 1.7  |
| Medium Market | 1.5  | 0.9  | 2.4  |
| Small Market | 0.5  | 1.1  | 1.6  |

Overall, TV stations are up about a third of a person over last year, but all of that comes from a modest increase in part time help. Full-timers are unchanged.

Radio went the opposite direction, with a slight increase in full timers but a small drop in part time.

**Do other staffers help on the web? 2014**

|  |  |
| --- | --- |
| All TV | 76.7%  |
| Markets 1-25 | 61.3  |
| Markets 26-50 | 73  |
| Markets 51-100 | 78.8  |
| Markets 101-150 | 79.9  |
| Markets 151+ | 84.8  |
|  |  |
| All Radio | 60.1%  |
| Major Market | 68.6  |
| Large Market | 67.2  |
| Medium Market | 56.8  |
| Small Market | 57.9  |

Last year, overall, TV staff participation in the web dropped by about 7 points; this year it's up by about 5. Basically back where it was.

Radio dropped from 68% two years ago to 52% last year. This year it's in between at 60.1%

**News director role with the web site - 2014**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | In Charge Overall | In Charge of News Content Only | Other | No Management Role |
| All TV | 23.8%  | 69.7%  | 4.3%  | 2.2%  |
| Markets 1-25 | 28.6  | 57.1  | 6.1  | 8.2  |
| Markets 26-50 | 30.3  | 66.7  | 3  | 0  |
| Markets 51-100 | 26.6  | 68.4  | 5.1  | 0  |
| Markets 101-150 | 21.9  | 72.6  | 2.7  | 2.7  |
| Markets 151+ | 11.6  | 83.7  | 4.7 | 0  |
|  |  |  |  |  |
| All Radio | 16.9%  | 44.6%  | 5.4%  | 33.1%  |
| Major Market | 13.3  | 33.3  | 26.7  | 26.7  |
| Large Market | 12  | 60  | 0  | 28  |
| Medium Market | 13.7  | 49  | 2  | 35.3  |
| Small Market | 22.8  | 36.8  | 5.3  | 35.1  |

Overall, the TV numbers are little changed from a year ago. But that actually masks an increase in the percentage of news directors who are in charge overall in markets 100 and larger, and a sharp decrease in the percentage of news directors in charge overall in markets 151+. Too early to call it a trend, but I'll keep an eye on it.

Most of the "other" involves stations that have a separate person in charge of the website ... who works with the news director.

The biggest change in radio is the jump in "no role" in website management ... from 22.1% last year to 33.1% this year. I'll watch that, too, to see if a trend is developing.

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 - 2014**

|  |  |  |
| --- | --- | --- |
|  | Page Views (in millions) | Unique Visitors (in thousands) |
| All TV | 3.84  | 467  |
| Market Size |  |  |
| 1-25 | 9.42  | 919.8  |
| 26-50 | 6.47  | 814.6  |
| 51-100 | 3.75  | 419  |
| 101-150 | 1.72  | 242.9  |
| 151+ | 1.42  | 400  |

Both TV page views and unique visitors rose modestly from a year ago ... led by growth in the top 50 markets.

Radio station web traffic is reported by too few news directors for me to break down the numbers beyond overall. And even those numbers are thinly reported. Based on the few dozen news directors and general managers who reported, average monthly radio station page views were 206,000 and average monthly unique visitors were 56,000. Both numbers are down from last year.

**Is the website making money? 2014**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Profit | Breaking Even | Loss | Don’t Know |
| All TV | 37%  | 7.4%  | 5.9%  | 49.6%  |
| Markets 1-25 | 27.9  | 7  | 9.3  | 55.8  |
| Markets 26-50 | 39.4  | 12.1  | 3  | 45.5  |
| Markets 51-100 | 50.6  | 7.6  | 5.1  | 36.7  |
| Markets 101-150 | 27.8  | 8.3  | 6.9  | 56.9  |
| Markets 151+ | 34.9  | 2.3  | 4.7  | 58.1  |
|  |  |  |  |  |
| All Radio | 15.4%  | 14%  | 11.2%  | 59.4%  |
| Major Market | 21.4 | 14.3  | 0  | 64.3  |
| Large Market | 16  | 4  | 12  | 68  |
| Medium Market | 16.7 | 16.7  | 12.5  | 54.2  |
| Small Market | 12.5  | 16.1  | 12.5  | 58.9  |

The bigger the TV newsroom, the more likely the station made a profit on the web, peaking at almost 54% profitability for stations with newsrooms bigger than 51. Fox affiliates lagged well behind other network affiliates in profitability, but Fox news directors were also much less likely to know about profitability than other news directors.

Radio was back up some from a year ago, but as the graph below shows, radio has bounced up and down for the 16 years I've been asking the question.

Profitability of station websites over time

The last two years in TV are down from the profitability peak of 2012. Radio continues its up and down ride.

***Bob Papper is Emeritus Distinguished Professor of Journalism at Hofstra University and has worked extensively in radio and TV news. This research was supported by the Lawrence Herbert 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 2013 among all 1,659 operating, non-satellite television stations and a random sample of 3,263 radio stations. Valid responses came from 1,300 television stations (78.4%) and 249 radio news directors and general managers representing 649 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.