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

**TV news employment slips slightly ... little change in radio**

**by Bob Papper**

* TV news employment slides down
* The number of newsrooms goes up for a change
* Radio news little changed ... as usual

The latest RTDNA/Hofstra University Annual Survey found a mixed picture on TV news staffing. The average size of a local TV newsroom fell slightly, but the median size remained exactly the same. The average dropped because fewer than usual really large stations returned the survey this year. That happens some years.

The number of TV stations originating local news actually went up by two this year -- to 719 stations. That reverses an eight-year trend of fewer newsrooms. I put the total local TV news employment at 27,300, down about 400 from last year.

The American Society of News Editors (ASNE) has delayed the release of this year's newspaper numbers until sometime "this summer." Last year's numbers from ASNE found that newspaper newsroom staff fell 6.4% from the year before. That's approaching three times the previous year's drop of 2.4%. That took the total daily newspaper news staff down from the record low of 40,600 two years ago to a new record low of 38,000 last year, spread among nearly 1,400 newspapers (twice the number of local TV newsrooms). I'll update the comparison between TV and newspaper as soon as ASNE releases the new numbers.

The average TV station hired 5.5 replacements during 2013 and 1.3 new, additional positions. Replacements are down 0.1, but new hires are up 0.4 from a year ago.

Top replacement hires:

1. Reporters ... barely edging out #2.

2. Producers ... way ahead of #3.

3. Anchors ... well ahead of #4.

4. Photographers ... just about double #5.

5. MMJs ... a little ahead of #6.

6. Weather ... modestly ahead of #7.

7. Sports ... noticeably ahead of closely ranked #8, #9 and #10.

8. Assignment editor

9. Executive producer

10. Web/social media

There are quite a few meaningful differences this year versus last. A year ago, reporters came out well ahead of producers; this year, they're almost dead even. Last year, photographers came in well ahead of anchors; this year, they're reversed. MMJs remained at #5, but the numbers were down. APs (associate or assistant producers or news assistants) almost disappeared from last year's list, and they failed to make a comeback this year either.

The top new hires usually look a lot like the replacement list. Not so much this year:

1. Producers ... clearly ahead of #2.

2. Reporters ... way ahead of #3.

3. Anchors ... almost double #4.

4. Web/social media ... not far ahead of tied #5 and #6 and almost tied #7.

5. Photographers

6. MMJ

7. Weather ... just edging out #8.

8. Assignment editor

TV staff size – 2014

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Avg full-time | Median full-  time | Maximum full-time | Avg part-time | Median part-time | Maximum part-time | Avg total staff | Median total | Maximum  total staff |
| All TV | 36.1 | 31 | 115 | 4.5 | 2 | 197 | 40.6 | 34 | 214 |
| Big four affiliates | 37.9 | 32 | 115 | 4.6 | 2 | 197 | 42.5 | 35 | 214 |
| Other commercial | 27.9 | 18 | 100 | 4.1 | 2 | 19 | 33.3 | 18 | 110 |
| Non-commercial | 5.4 | 3.5 | 18 | 2.6 | 1 | 8 | 8 | 7.5 | 18 |
| Market size: |  |  |  |  |  |  |  |  |  |
| 1-25 | 56.2 | 68 | 115 | 4.9 | 3 | 20 | 60.1 | 70 | 124 |
| 26-50 | 56.8 | 57 | 99 | 4.8 | 4 | 16 | 63 | 62 | 109 |
| 51-100 | 37.2 | 36.5 | 92 | 3.9 | 2 | 20 | 40.6 | 40 | 92 |
| 101-150 | 26.6 | 25 | 62 | 6 | 2 | 197 | 32.4 | 28 | 214 |
| 151+ | 19 | 19 | 35 | 2.8 | 1 | 17 | 22.1 | 21 | 52 |

The average full time staff dropped by two this year, although the median size remained exactly the same. It's clear that the fall in average staff size occurred because fewer very large top 25 stations filled out employment numbers. That happens some years. But it's also clear that overall employment didn't go up. Most of the numbers of full-timers are pretty consistent with last year's figures. Average part time numbers also fell -- virtually all in the top 25 market, network-affiliated stations. The drop in staffing occurred mostly among Fox affiliates and stations in the Midwest.

Staff size changes … the past year

|  |  |  |  |
| --- | --- | --- | --- |
|  | Increase | Decrease | Same |
| All TV news | 46.2% | 10.7% | 43.1% |
| Big four affiliates | 46.8 | 9.5 | 43.7 |
| Other commercial | 50 | 19.2 | 30.8 |

As usual, the bigger the station, the more likely it was to get even bigger. The percentage of stations adding staff rose about one and a half points from a year ago, but the percentage cutting rose by 2. ABC affiliates were a little less likely to grow than others, but they were a bit more likely to grow a year ago. Stations in the Northeast and South were more likely to increase staff than stations in the Midwest and West. That's different from last year -- except for the West, which has lagged for a few years now.

Planned staff changes … the next year

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Increase | Decrease | Same | Not sure |
| All TV news | 43.4% | 1.9% | 45.9% | 8.9% |
| Big four affiliates | 42.9 | 2.1 | 45.7 | 9.2 |
| Other commercial | 53.8 | 0 | 38.5 | 7.7 |

News directors clearly feel more bullish about 2014. There was a jump of 9 points in expectations of staff increases, and that optimism is across most station groupings. The smallest newsrooms and the smallest markets don't share this optimism, but most others do. CBS affiliates are a little less bullish, but the differences aren't large.

TV news budget … the past year

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Increase | Decrease | Same | Don’t know |
| All TV news | 52.2% | 7.3% | 34.3% | 6.2% |
| Big four affiliates | 54.1 | 7 | 33.2 | 5.7 |
| Other commercial | 45.5 | 13.6 | 31.8 | 9.1 |
| Market size: |  |  |  |  |
| 1-25 | 47.6 | 11.9 | 35.7 | 4.8 |
| 26-50 | 51.5 | 9.1 | 33.3 | 6.1 |
| 51-100 | 54.3 | 7.4 | 33.3 | 4.9 |
| 101-150 | 55.4 | 2.7 | 37.8 | 4.1 |
| 151+ | 47.7 | 9.1 | 29.5 | 13.6 |

The last time a majority of news departments saw budget increases was 2006-2007, just before the housing implosion and resulting recession. Last year was close, but this time it finally made it. Budget growth was led by most of the network affiliates -- except Fox -- and the largest stations. The Midwest and West lagged behind the Northeast and South.

TV news profitability … 2000 - 2014

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | 2000 | 2005 | 2010 | 2011 | 2012 | 2013 | 2014 |
| Showing profit | 58% | 44.5% | 47.8% | 57.4% | 59.3% | 65.7% | 57.6% |
| Breaking even | 11 | 24.2 | 14.6 | 9.3 | 7.7 | 4.9 | 9.4 |
| Showing loss | 11 | 12.1 | 8.3 | 6.9 | 3.7 | 4.2 | 1.8 |
| Don’t know | 20 | 19.2 | 29.2 | 26.3 | 29.3 | 22.7 | 28.3 |

After hitting its highest level last year since 1995, the profit percentage dropped back to 2011 levels -- although most of the difference could well come from a sizeable increase in the percentage of news directors saying they didn't know about station profitability. Missing percentages are non-commercial stations.

TV news profitability … by size and affiliation – 2014

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Showing profit | Breaking even | Showing loss | Don’t know |
| Market size: |  |  |  |  |
| 1-25 | 42.2% | 13.3% | 0 | 33.3% |
| 26-50 | 47.1 | 14.7 | 5.9 | 32.4 |
| 51-100 | 66.2 | 10 | 0 | 21.2 |
| 101-150 | 63 | 6.8 | 1.4 | 27.4 |
| 151+ | 56.8 | 4.5 | 4.5 | 34.1 |
| Staff size: |  |  |  |  |
| 51+ | 63 | 11.1 | 3.7 | 22.2 |
| 31-50 | 65.2 | 5.8 | 0 | 29 |
| 21-30 | 65.5 | 7.3 | 1.8 | 25.5 |
| 11-20 | 58.3 | 13.9 | 2.8 | 22.2 |
| 1-10 | 4 | 24 | 0 | 44 |
| Affiliation: |  |  |  |  |
| ABC | 63.1 | 7.7 | 0 | 29.2 |
| CBS | 60.5 | 5.3 | 1.3 | 32.9 |
| Fox | 38.1 | 28.6 | 4.8 | 28.6 |
| NBC | 61.2 | 7.1 | 3.5 | 28.2 |
| Big four affiliates | 59.5 | 8.5 | 2 | 30 |
| Other commercial | 57.1 | 23.8 | 0 | 19 |

Note that the percentage showing a loss is extremely low.

Percentage of TV station revenue produced by news – 2014

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Average | Median | Minimum | Maximum | Not sure |
| All TV news | 50% | 50% | 10% | 70% | 79.1% |
| Market size: |  |  |  |  |  |
| 1-25 | 45.3 | 42 | 35 | 60 | 82.9 |
| 26-50 | 53.3 | 52.5 | 35 | 70 | 81.2 |
| 51-100 | 48.1 | 50 | 10 | 70 | 74 |
| 101-150 | 47.1 | 47 | 30 | 70 | 78.6 |
| 151+ | 60.7 | 65 | 50 | 70 | 83.3 |
| Staff size: |  |  |  |  |  |
| 51+ | 49.4 | 46 | 31 | 70 | 67.3 |
| 31-50 | 47.8 | 48.5 | 30 | 70 | 78.8 |
| 21-30 | 48.9 | 52.5 | 10 | 70 | 70.4 |
| 11-20 | 51.6 | 48.3 | 45 | 65 | 89.2 |
| 1-10 | \* | \* | \* | \* | 96.2 |
| Affiliation: |  |  |  |  |  |
| ABC | 53 | 54 | 30 | 70 | 87.7 |
| CBS | 47.7 | 47 | 31 | 70 | 71.6 |
| Fox | 46 | 46 | 32 | 60 | 90.5 |
| NBC | 50.6 | 55 | 10 | 70 | 75.6 |
| Big four affiliates | 49.5 | 50 | 10 | 70 | 78.7 |
| Other commercial | 51 | 45 | 35 | 70 | 75 |

\* Insufficient data

There was another small jump in the total revenue produced by news, and this is the first time that both average and median news revenue have been half of total station revenue. But there's a caution in the numbers. As I've pointed out before, a high percentage of news directors say they don't know the answer to this question.

**Radio Staffing**

The typical (median) radio news operation had a full time news staff of one -- the same as it's been since I started doing these surveys 20 years ago. Radio news remains highly centralized, with the typical news director overseeing the news on two stations, with 86% of all multi-station local groups operating with a centralized newsroom.

Radio staff size – 2014

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Avg. full-time | Median full-time | Max full-time | Avg part-time | Med part-time | Max part-time | Avg total staff | Med total staff | Max total staff |
| All radio news | 2.3 | 1 | 23 | 2.3 | 1 | 35 | 4.6 | 3 | 40 |
| Market size: |  |  |  |  |  |  |  |  |  |
| Major | 5.2 | 4 | 23 | 3 | 3 | 17 | 8.2 | 5 | 40 |
| Large | 3.7 | 2.5 | 14 | 3.3 | 1.5 | 15 | 7 | 6 | 20 |
| Medium | 2.1 | 2 | 8 | 2.6 | 1 | 35 | 4.6 | 3 | 35 |
| Small | 1.1 | 1 | 9 | 1.5 | 1 | 13 | 2.6 | 2 | 16 |

A mixed picture on staffing changes in radio this year. Bottom line: the typical radio station has one full time person in news. That's been true -- and unchanged -- for at least a couple decades. Total radio news employment is up this year versus last year, but not in the way radio news people would like. Full time radio news employment dropped by 0.2, while average part time employment rose by 0.5. That's true pretty much across the board and across varying market sizes. As usual, non-commercial staff size is about double commercial stations. A group of 2 or more stations in a market didn't change that typical one news person. At three or more stations, the typical news department had two people in news instead of one. Geography made little difference in the numbers.

Changes in radio staff and budget in the last 12 months and planned for the future – 2014

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Increase | Decrease | Same | Not sure |
| Total news staff the past year | 13.8% | 8.2% | 77.4% | 0.6% |
| Plan to change amount of staff next year | 12.3 | 2.5 | 75.3 | 9.9 |
| Change in news budget from the year before | 12.3 | 5.6 | 66.7 | 15.4 |

Most of these numbers are similar to last year. Staff increases were again a function of commercial/non-commercial and market size. Non-commercial stations were three times as likely to increase staff as commercial stations. Major markets were a little more likely to increase staff, and the smallest markets were a lot less likely to add staff. Almost a third of non-commercial stations think they'll add news staff this year, but less than 5% of commercial stations think so. Stations in the Northeast were a little more likely to add staff last year, but they're at the bottom in terms of expecting to add staff this year.

Radio news profitability … 2000 - 2014

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | 2000 | 2005 | 2010 | 2011 | 2012 | 2013 | 2014 |
| Showing profit | 25% | 19.6% | 13.9% | 23.0% | 14.6% | 14.3% | 12.5% |
| Breaking even | 15 | 14.4 | 13.9 | 21.5 | 19.5 | 17.4 | 11.2 |
| Showing loss | 7 | 3.1 | 9.8 | 9.6 | 10.4 | 11.8 | 10.6 |
| Don't know | 53 | 62.9 | 62.3 | 45.9 | 55.5 | 33.5 | 41.2 |
| Non-profit |  |  |  |  |  | 23.0 | 24.4 |

Usually, profitability is a function of market size, with the biggest markets most likely to report making money on news. Not this year. This time around, the smaller the market, for the most part, the more likely for the news director to say that the station made money on news. Stations in the Northeast were a little more likely to report a profit on news, and stations in the South a little less likely.

I usually don't report the percentage of radio station revenue derived from news because so few news directors say they know the answer. With over a quarter of news directors and general managers reporting, they say that average station revenue from news was 21% ... but the median percentage was just 2%. You get that kind of variation because you have a number of all-news stations at the high end, but most stations are in the 0 - 2% range.

Radio news profitability by market size – 2014

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Showing profit | Breaking even | Showing loss | Don’t know | Non-profit |
| Major market | 6.7% | 6.7% | 13.3% | 33.3% | 40% |
| Large market | 4 | 4 | 8 | 28 | 56 |
| Medium market | 13.8 | 6.9 | 6.9 | 55.2 | 17.2 |
| Small market | 16.1 | 19.4 | 14.5 | 35.5 | 14.5 |

Major markets are those with 1 million or more potential 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.

As always, it's also hard to project radio hiring based on the survey responses. Only half the news directors answered the question, and there's no way to know whether a non-answer means there was no hiring or whether it's just a non-answer. The median number of hires -- both replacements and new positions -- was zero. That doesn't mean there was no hiring, but more than half the stations reported they hired no one in news. Of those that did hire, they hired an average of 0.3 people as replacements and 0.2 people in new positions. That's almost exactly the same as last year. Bottom line: another in a series of weak years for radio news employment.

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**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.