

# **The (News) Doctor is In: The (Real) State of the Industry**

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**RTNDA ... Tuesday, April 21, 2009**

**Bob Papper  
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# **There are fewer newspaper reporters ... I can tell**

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**Staffing**

**Salaries**

**News**

**Revenue & Profitability**

**Where we're headed**

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# **There are fewer jobs in TV**

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**In 2008, there was a 4.3% drop in TV news staffing ... a loss of about 1,200 jobs.**

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# **By the numbers ... staffing**

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**Almost 4 times as many  
stations reported cutting staff  
(56.0%) as adding staff (15.8%)**

**Markets 1 – 100 most likely to  
cut ... all over 60%**

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# **By the numbers ... staffing**

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**CBS affiliates most likely to see cuts: 62.9% Fox the least: 36.1%**

**The West got hit the hardest: 62.7% ... the Northeast the least: 43.8%**

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# **Radio largely unchanged**

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**Mostly, staffing stayed the same (79.4%) ... with just about the same percentage saying they cut as added ... but typically that's 1 person**

**The amount of news dropped slightly**

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# **Radio largely unchanged**

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**Three-quarters say they plan to run the same amount of news as last year ... and over 80% plan the same staffing level**

**Few radio news directors say they know about radio news profitability**

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# **Bad news on salaries**

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**Overall, during 2008, TV news salaries dropped 4.4%**

## **Hardest hit:**

**News reporters -13.3%**

**News anchors -11.5%**

**Weathercasters -9.1%**

**Sports anchors -8.9%**

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# **Bad news on salaries**

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**Overall, during 2008, radio news salaries dropped 1.8%**

**Inflation in 2008: 3.8%**

**So, TV news real wages dropped 8.2%  
... and radio dropped 5.6%**

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# **But the picture is more complicated than that ...**

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**It's not all about TV**

**Between 2007 and 2008,  
U.S. employment dropped 4.7%**

**In 2008, U.S. employment  
dropped 3.8%**

**We're in a recession, and TV isn't  
faring much worse than anything else**

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# **Doing more with less (fewer)**

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**The typical TV station added a half hour of local news per weekday in 2008 ... setting a new record for the amount of news: 4.6 hours per weekday**

**Saturday and Sunday remain at 1.7 hours each**

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# **By the numbers ... news**

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**Top 50 markets most likely to increase the amount of news**

**Independents most likely to cut**

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# **By the numbers ... amount of news**

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**Most stations stayed the same  
(65.9%)**

**Three times as many stations added  
news (29.9%) as cut news (8.5%)**

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# **By the numbers ... amount of news**

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**Two-thirds of the newscasts added were on weekdays.**

**Most common:**

- **10 pm**
  - **5 am and 7 am**
  - **Noon**
  - **7 pm and 5 pm**
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# **By the numbers ... amount of news**

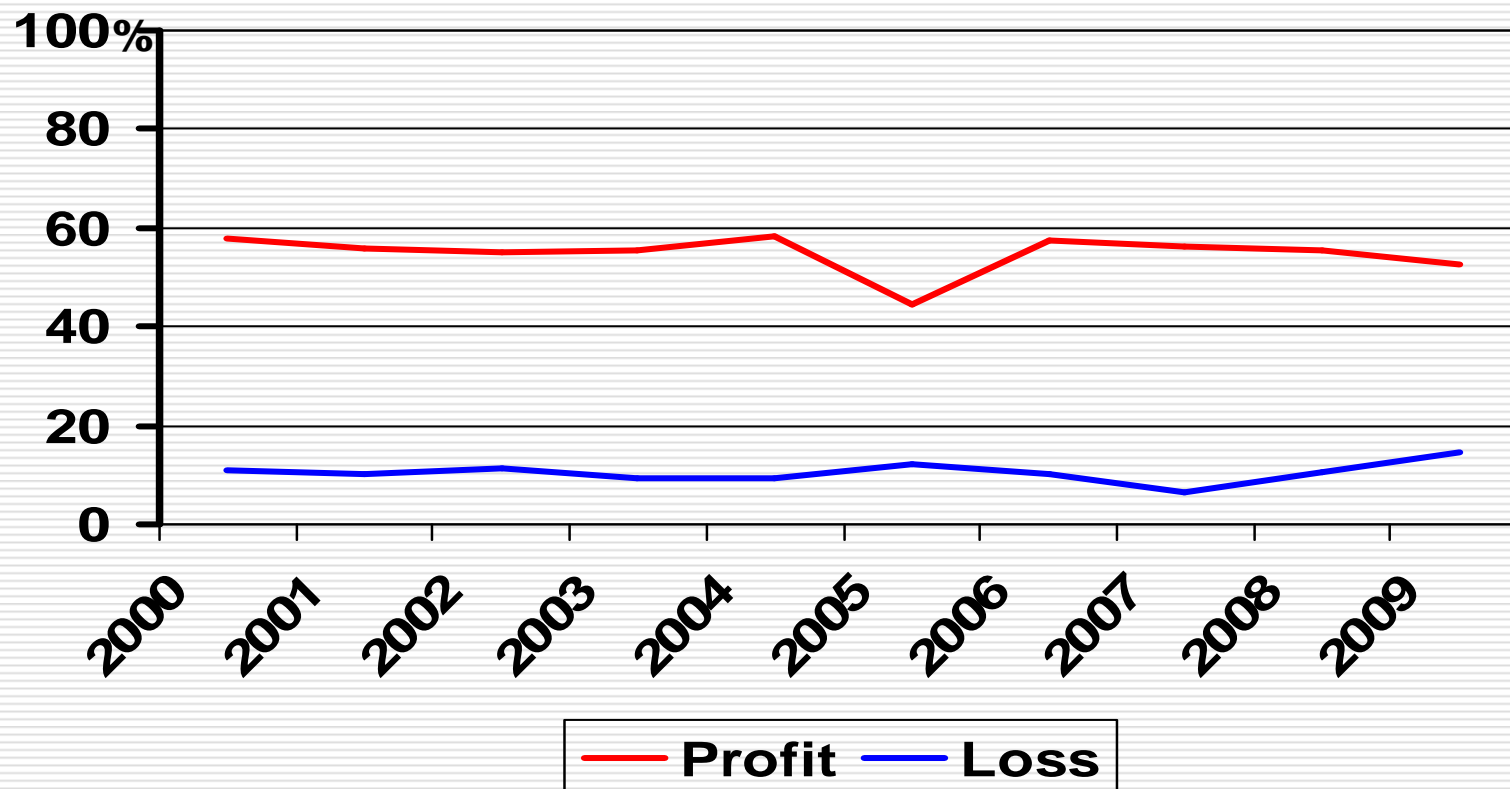
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**Few newscasts were cut ... and most were scattered ... but there were multiple cuts at noon and 11 pm**

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# TV news still makes money

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# **TV news still makes money**

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**And over 40% of station revenue still comes from news.**

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# **TV stations running local news**

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**2008 started with 774 stations  
originating local news**

**The year ended with 770**

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# **TV stations running local news**

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**So far in 2009 ... 3 stations have stopped originating local news ... and 3 stations have started or announced the start-up of local news**

**Still at 770**

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# **TV stations running local news**

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**In 2008, 2 of the 4 stations that stopped originating local news started running local news from another station.**

**In 2009, 2 of the 3 stations that stopped originating local news started running local news from another station.**

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# **TV stations running local news**

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**That brings the total number of stations running local news from another station to 205**

**And the total number of stations running local news to 975**

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# **Where are we headed?**

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**We're still in a recession!**

**In staffing, we're not done with cuts yet**

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# **By the numbers ... staffing**

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**A plurality (43.3%) expect no staffing changes in 2009**

**But almost 3 times as many stations expect to cut staff this year (31.6%) as expect to add staff (9.3%) ... 15.8% say they don't know**

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# **By the numbers ... staffing**

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**In 2009 ...**

**No discernible pattern yet ... other than biggest markets and biggest news departments most likely to cut**

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# **The good news ...**

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**TV isn't newspaper**

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# **Newspaper in crisis ...**

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**In 2008, newspapers cut  
newsroom staff by 10% – 20%**

**Since January 1, 2008, at least  
16 daily newspapers and 124 weeklies  
have ceased publication**

**I think 2009 will be worse**

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# **Amount of news in TV**

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**In 2009 ...**

**Yes, there's regular talk about low-rated stations dropping news ...**

**they've been saying that for more than a decade ...**

**maybe this is the year it'll really happen**

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# **Amount of news**

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**In 2009 ...**

**But I don't think so**

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# **Amount of news ... 2009**

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**Most stations (60.2%) plan no change in the amount of news this year ... but 6 times as many plan to add news (23.9%) as cut back (4.0%)**

**That's the lowest percentage expecting an increase that I've seen**

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# **Amount of news ... 2009**

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**The smaller the staff, the more likely to expect an increase in the amount of news**

**CBS and Fox affiliates most likely to expand local news**

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# **Amount of news ... 2009**

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**I expect relative stability ...  
although we may see some cuts in  
secondary and tertiary newscasts**

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# **Bottom line ...**

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**2009 will be a tough year ...**

**2010 will be a lot better**

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# **Predicting the future ...**

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**Despite dire predictions to the contrary ...**

**I don't expect to see many stations eliminate local news this year ... and most of those that do will be CW, MyNet, Hispanic and independents**

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# **Predicting the future ...**

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**Downward pressure on salaries  
will continue this year ...  
especially on higher end salaries  
... especially at stations not  
number 1 or strongly competitive**

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# **Predicting the future ...**

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**Cooperative deals will continue among stations and between stations and newspapers ... at least until Congress or the Justice Department starts to raise questions**

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# **Predicting the future ...**

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**In 2010, as the economy and advertising start to pick up ...**

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# **Predicting the future ...**

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## **Look for further news expansion:**

- **More stations doing news**
  - **More digital stations doing all news**
  - **More news on stations**
  - **A big jump in staffing**
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# **One-man-bands** (with apologies)

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**Don't believe everything you hear ...  
or read**

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# **One-man-bands** (with apologies)

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<b>Stations mostly using OMB ...</b>	<b>26.4%</b>
<b>Stations using some OMB ...</b>	<b>28.4%</b>
<b>Stations use OMB – but not much ...</b>	<b>19.7%</b>
<b>Stations do not use OMB ...</b>	<b>25.5%</b>

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# One-man-bands (with apologies)

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	<b>2007</b>	<b>2009</b>
<b>Stations mostly using OMB</b>	<b>22.3%</b>	<b>26.4%</b>
<b>Stations using some OMB</b>	<b>26.9%</b>	<b>28.4%</b>
<b>Stations use OMB – but not much</b>	<b>22.3%</b>	<b>19.7%</b>
<b>Stations do not use OMB</b>	<b>28.6%</b>	<b>25.5%</b>

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# **One-man-bands** (with apologies)

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## **Comparing 2008 use with 2007**

<b>Stations used OMB more ...</b>	<b>13.7%</b>
<b>Stations used OMB less ...</b>	<b>15.8%</b>
<b>Stations used OMB about the same ...</b>	<b>70.5%</b>

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# **One-man-bands** (with apologies)

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## **Expected use in 2009 compared to 2008**

**Stations expect to use OMB more ...**

**36.4%**

**Stations expect to use OMB less ...**

**2.1%**

**Stations expect to use OMB about the same ...**

**61.5%**

**They said that in 2007, too ...**

**but not quite as much**

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