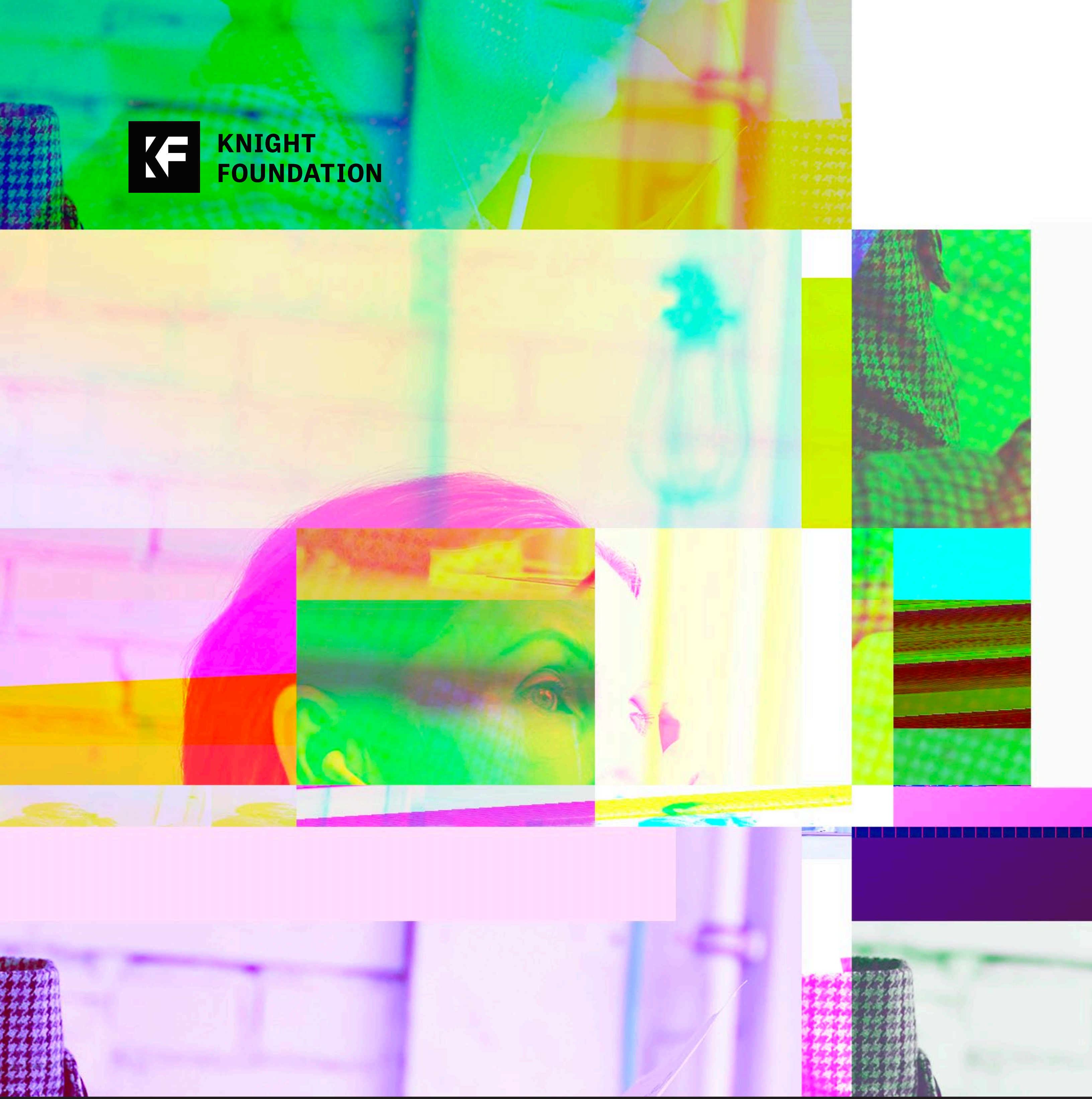

KNIGHT FOUNDATION

Local TV News and the New Media Landscape: Part 1

THE STATE OF THE INDUSTRY

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INNOVATION AND
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The views and analyses in these reports are the authors' alone. All analysis of data commissioned from Nielsen by the John S. and James L. Knight Foundation was performed by the researchers, independent of Nielsen.

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IN ORDER TO ASSESS WHERE LOCAL TELEVISION NEWS IS GOING, IT'S CRITICAL TO DETERMINE EXACTLY WHERE IT IS TODAY. That's not nearly as easy to do as it may seem. While local TV news has been the predominant supplier of local news for some time,[1] it's not alone in the field, and it's not always clear how all the competitors line up. Who's ascendant and who's not?

Historically, the major players have been local television stations, local newspapers and local radio stations. But there are new, digital-only local news producers. To what extent do they alter the local news supply balance? It's clear that more and more people get their local news online, but isn't most of that news actually produced by the same legacy players that have been doing so all along: television, newspaper and radio? How has the shift to digital impacted the producers of news? Among the new entries and legacy suppliers of local digital news, who dominates the field?

The future will be determined by the intersection of two related, but not completely interdependent trend lines: news consumption and the costs and revenue involved in its production. For television, revenue remains strong, costs are dropping as technology gets cheaper, and the regulatory environment is likely to allow further consolidation. Those are positive trends for local TV news versus competitors.

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- **Local TV news is profitable**, and the deluge of political money every two years, along with retransmission fees, provides a variety of strong revenue streams unavailable to other media.
- **Local TV consolidation has increased dramatically since 2000, allowing cost savings and revenue opportunities.** The current regulatory environment is favorable for more consolidation in the future.
- **Competitors have far bigger problems than TV news — at least for now.** Newspapers have been losing circulation long before the internet, and many papers may not survive beyond the next five years or so. Radio — as it has in the past — is holding its own. Not growing, not shrinking. Just there.
- **New competitors in online-only information websites aren't much of a threat.** There are only a handful — literally, a handful that might be self-sustaining, and it's unlikely that any are making a meaningful return on investment. At the same time, there are a few reader-supported, foundation-supported and/or education-supported websites that are making a mark.
- **Social media are an important news distribution platform and a dominant player in the battle for advertising dollars, but they produce little to no original news content**, and they don't seem interested in developing their own newsrooms... or sharing their revenue with news producers.

TV REVENUE REMAINS STRONG

Local television news continues to make money, and stations — and the companies that own them — continue to invest in news and are buying more stations. "Local TV news is a strong profit center," according to Mark Fratrik, senior vice president and chief economist at BIA Kelsey, a financial services firm that follows media, "and groups will continue to invest in local TV news."

And with many stations consolidating operations, costs are going down and revenues are rising. Just under 30 percent of TV stations are involved in some sort of "shared services" (or similar) arrangement with another station. In these arrangements, one station oversees or even conducts most or all of another station's operation. Across the country, there are now 703 local TV newsrooms which produce local news for 1,072 stations.

Consolidation has meant both cost savings and revenue growth. There have been savings in facilities by combining newsrooms and stations; there have been savings in salaries by running the same or essentially the same newscasts on multiple stations; centralized control rooms and graphic production have reduced costs; outlets have probably held down wages because there are fewer competing options for staff.

TV still generates most of its income from advertising and, for stations that run local news, more than half of total station revenue (median 55 percent) comes from news. Station websites have also become increasingly profitable, though they still generate a small share of profits. Digital advertising accounted for $2.12 billion in 2016, compared to $18.06 billion from over the air advertising.[2]

The seemingly endless political cycle helps the bottom line as well. “Political money has really saved the business, says Justin Neilson, senior research analyst and media consultant at SNL Kagan, “and the money keeps going up and up.’’ Even numbered years — both presidential elections years and state and congressional-only elections — add more than $2 billion to local TV revenue. But the biggest growth area for local stations has been the steady jump in cable and satellite carriage fees. Labeled “retransmission,” this is the money cable, satellite and telecommunications carriers pay to broadcasters to include those local channels on the cable or satellite systems. In less than a decade, the percentage of station revenue from retransmission has gone from near zero to 24 percent of total station revenue, and financial research firm SNL Kagan estimates that retransmission revenue will rise by at least 50 percent in the next five years.

In addition to retransmission fees, some stations are generating as much as 5 percent of their total revenue from “multicasting:” transmitting additional digital signals, typically programmed with low-cost, but well-known movies and TV shows, which in turn open up more opportunities for selling advertising.[3]

While revenue is growing, predictions about the future suggest potential challenges for the business model. Magna, the research arm of media buying firm IPG Mediabrands, reports that 2017 is the year when total *digital* advertising surpassed total TV advertising. Digital is now taking in 41 percent of all advertising dollars versus 35 percent for TV. However, Magna makes it clear that TV advertising revenue is expected to grow in 2018, just not as much as digital.[4] According to eMarketer, newspapers were projected to get 6.6 percent of total advertising revenue in 2017, falling below radio at 7 percent.

“Local TV is a prisoner of its success,” notes Harry Jessell, co-founder of NewsCheck Media and editor and co-publisher of TVNewsCheck.com. “Like newspapers in 2003. Broadcasters may go the way of newspapers, but newspapers won’t be around to celebrate.”

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TV DOMINATES VIDEO VIEWING

In time spent with media, TV use towers over any other medium. Nielsen numbers released for first quarter of 2017 put total average TV viewing at 4 hours and 55 minutes per day — per adult. Next closest is the cellphone at 2 hours and 19 minutes a day.

Television also dominated video viewing in 2017. Nearly all (95 percent) of video watching was on a TV, 4 percent was on the internet, and 1 percent was on a smartphone. Of the nearly five hours per day involved watching TV, 4.5 hours of that involved watching live TV. There is no question that mobile, internet-based content is gaining. From 2015-2016, TV dropped 3 minutes a day from the year before, but smartphone use was up 37 minutes from the previous year.

Age makes a significant difference. Generally, the older the viewer, the more they watch TV. Young adults, 18 to 24, were the lowest in TV viewing at 2.2 hours per day. Pew Research Center's 2016 study, The Modern News Consumer, found that Americans "show a clear preference for getting news on a screen, and the TV screen still leads the way." But, the research also found that while the dominance of TV was clear among news consuming Americans 50+, those 18 to 29 years old reported they "often" got news online.[5]

Common wisdom says the local TV news audience is shrinking. That's almost certainly true, but it's more complicated and less defined than that.

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It's never been clear whether the aggregate local TV news audience has shrunk versus simply spread out as on-air news choices have expanded. While the audience for any given program (or specific time slot) has generally fallen, there's also 90 percent more local news being broadcast today than 20 years ago.[6] And viewers can find that local news on 39 percent more stations than 20 years ago.[7]

Definitively answering the question requires a complete examination of ALL local TV news over time in a reasonably wide sampling of markets. No one has done that — or even attempted it as far as we can determine. We were not able to do that either, but we were able to look at two markets — one on the East Coast and one on West — both in the middle range of the U.S. population (markets 20 to 30). We looked specifically at audience size for local news at all stations in all time periods over the last dozen years — from 2004 to 2016.

In both cases, there was a drop in overall local TV news audience. At the East Coast market, the total ratings for local TV news fell by 12.4 percent from 2004 to 2016; at the West Coast market, the total ratings for local TV news fell by 9.8 percent. That's ratings — the percentage of viewing of all possible viewers.

The drop in the *number* of people viewing was lower. In the East Coast market, the number of adults, 18+, watching local TV news fell by 8.9 percent. In the West Coast market, the drop was 4.3 percent.

The point is the drop in audience was real, but the data suggests that it may not be nearly as extensive a drop as has been widely reported.

"If you believe the misconception that local [TV] news has fallen out of favor, think again. In actuality, news viewing increased from 2015 to 2016 and has shown continued growth in early 2017," according to a recently-released 2017 Local Watch Report from Nielsen.[8]

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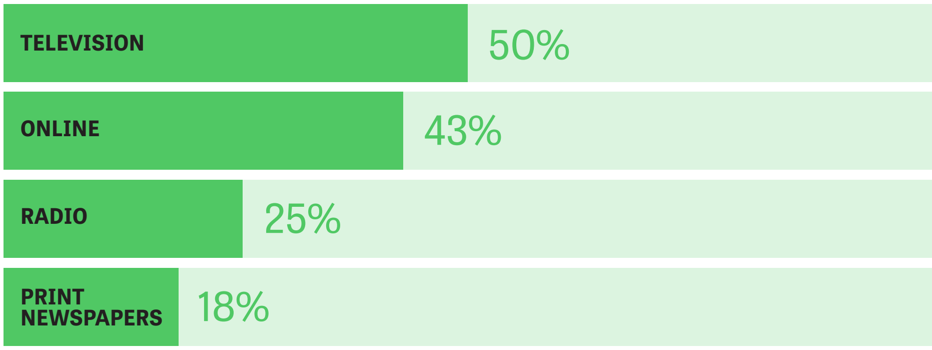
Overall, local TV news remains the go-to news source for Americans.

Nielsen found that local TV news reaches more people 18+ and 25 to 54 than network news or cable news. By a lot. Nielsen reported the reach of local TV news to be 18 percent higher than network TV news and more than double the reach of cable TV news (46 percent to 22 percent).

In Nielsen's local people meter markets, the average adult spent nearly 6 hours per person each week (5:47) watching TV news. Among adults, news accounted for 18.2 percent of all TV viewing — up from 14.7 percent in 2015. In the first quarter of 2017, in the top 25 markets (representing just short of half the total U.S. population), adults watched more than 44 billion minutes of news in a typical week — up 11 percent from full-year 2016 and 15 percent from full-year 2015.[9]

Overall, local TV news remains the go-to news source for Americans.[10] The most recent Pew numbers found that local TV remained on top of the list of where U.S. adults "often" get news — even as the margin (over online) has tightened.[11]



TECHNOLOGY IS LOWERING COSTS

Advances in technology, like bonded cellular live transmission, increasing cellphone camera quality, and steadily dropping prices for computers, cameras and other technology have all worked to lower costs at TV stations.

Technology, however, may reshape the TV business in other new ways — with help from the Federal Communications Commission. ATSC 3.0 is a new broadcast standard that will support a number of innovations, including mobile television. It also offers broadcasters an opportunity to create even more channels of programming and to improve targeted and interactive advertising. The most optimistic companies, including Sinclair, which owns or operates 193 local stations, see huge potential in the new standard being able to "liberate broadcasting from the living room and put it in cars and smartphones."[12]

However, a switchover to ATSC 3.0 is expensive and disruptive, requiring huge station investment, governmental rule changes and a willingness on the part of the public to purchase new TV sets or conversion kits. None of those things is certain to happen.

OWNERSHIP CONSOLIDATION WILL CONTINUE

Not long after the start of this century we started to see an increasing consolidation of TV station ownership and the increasing use of management agreements to circumvent longstanding ownership limitations. On the revenue side, larger station groups have more leverage in negotiations for syndicated programming and retransmission fees, and fewer station competitors in a market may well have led to increasing advertising rates.

When it comes to diversity in content providers, new threats may be emerging. The Federal Communications Commission (FCC) voted in April 2017 to reinstate what's commonly known as the "UHF discount." The move means that station owners do not have to include all of the audience they reach on channels broadcast over UHF frequencies. That's important because TV station group owners are not allowed to reach more than 39 percent of the nation's audience without a waiver. In December, the FCC voted to review whether that cap should be modified or even eliminated. Therefore, one significant barrier for a single company owning more stations than ever before has been lifted and another may follow. Sinclair Broadcast Group's bid for the Tribune television stations could very well be the start of a new round of consolidation, with Fox Broadcasting adding stations that must be cast off in the Sinclair purchase of Tribune.

In addition, some in the industry expect a repeal of the "Top 4 Station" barrier to multiple station ownership. Under this FCC rule, no company can own more than one station among the top four, as determined by an accepted audience ratings service such as Nielsen. If that rule is eliminated, it's anticipated that some of the wealthiest station groups, such as Hearst and Cox, would seek to purchase their chief competitors within the markets they serve. That would mean fewer separate editorial voices in any number of TV markets.

The Federal Communications Commission is also removing the ban of cross-ownership between newspapers and television stations. That change could aid ailing newspapers but could also reduce the number of independent editorial voices in a community. There was a time when the industry lobbied hard for that change, but it didn't come. Now, times have changed, and most of the companies that owned both TV stations and newspapers have split apart. Gannett became Tronc (newspaper) and Tegna (broadcast). Tribune is trying to sell its stations to Sinclair. Dispatch sold its newspaper and now just owns TV stations. The New York Times and Washington Post both became just newspaper companies (and the Post was sold to Amazon principal Jeff Bezos).

Consolidation in TV has left few free-standing stations (or even small groups) available for purchase. Few newspapers have the cash available to buy the few stations that might be for sale, and it's hard to imagine why a TV station would want to buy a newspaper. But if the rule change survives expected court challenges, at least some cross ownership is likely to take place, particularly in small and medium size markets.

Still, there's long been a belief that the changing economics of TV news would mean that many markets would ultimately prove to have too many stations for all to be sustained long term. Federal Communications Commission rule changes may hasten the reduction of competition, but with or without the relaxation of government regulation, it is likely that there will be fewer local TV newsrooms in each market due to changing market forces. Over the last decade, the changing media landscape and station consolidation have resulted in the number of separate local TV newsrooms to fall, on average, by seven newsrooms per year, although 2017 only saw a net reduction of two local TV newsrooms.

Regardless of how those possible regulatory and consolidation changes take place, local news is likely to continue to be critical to the success of local TV. "I see a lot of focus on local news; it's really the one differentiating point in local TV," according to Nielson.

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NEWSPAPERS HAVE A DIFFICULT FUTURE

The newspaper industry's struggles may inadvertently have been a boon to broadcast news. The costs of printing and distributing a newspaper go up every year. Local newspapers can save that printing and distribution money by going online, but digital revenue dimes are not replacing print advertising dollars, and paywalls have not generated the subscription revenue required to make up for advertising losses.

As Newsonomics' Ken Doctor has noted, newspaper viability is dependent on boosting circulation/subscriber income from the roughly 35 percent of newspaper revenue that it currently takes in to 60 to 70 percent of total revenue. But the likelihood of that would seem to be dependent on potential subscribers finding an increasing benefit in paying (or paying more) for the newspaper. In lieu of that, newspapers will find themselves increasingly competing with local television for already hard-to-get digital dollars, and they will be doing that with smaller newspaper staffs.

In the decade since the last recession hit, newspapers have shed 26,300 newsroom employees — 46.1 percent of total employment. "The combination of less content, smaller print products, inferior mobile products and finally doubling the price of subscriptions and single copy [sales] have caused deeper losses in circulation," notes Doctor. He points out that the problem isn't readership; the combined print and digital readership "has never been higher." It's the loss of advertising.

In contrast, local TV news employment is up 4.9 percent in that same time frame, and most TV newsrooms are at their highest level of staffing ever.

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There's little positive news in the newspaper industry. Year-to-year declines in circulation, revenue and employment apparently became so depressing that the organizations that used to issue the numbers on those metrics have stopped doing so.[13] Pew's State of the News Media 2017 notes that newspaper "financial fortunes and subscriber base have been in decline since the early 2000s." Weekday circulation has fallen 39.2 percent in the last 20 years and 33.8 percent in just the last 10. But the signs of decline were actually available much earlier.

Historically, newspapers have reported circulation as raw numbers. By contrast, television viewership has always been reported as ratings — a percentage of available viewers (or households). That means that as the U.S. population has grown, TV would have to attract more and more viewers just to maintain steady ratings. If newspaper circulation numbers were viewed like television ratings, then the industry would have seen that the decline in circulation actually started just after the end of World War II.

As a percentage of available U.S. households, newspapers have been in a relentless circulation decline since the 1940s — with the biggest five-year drops coming between 2005 to 2010 and 2010 to 2015 — both, long after the internet came along. The third biggest percentage drop came in 1970 to 1975, and the fourth largest came in 1990 to 1995.[14]

Even as newspapers are doing reasonably well online in terms of readership, the modest increase in digital dollars appears to be falling farther and farther behind the loss of non-digital advertising revenue. The $0.9 billion increase in subscriber/circulation (9 percent over 5 years) does not nearly cover the $8.8 billion drop in advertising. Note that while newspaper digital dollars rose by 3.9 percent between 2015 and 2016, SNL Kagan estimates that digital dollars in local television rose by 12 percent over the same period.

"Newspapers have another five years," Doctor thinks. The next recession could wipe out half the country's newspapers.

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RADIO REMAINS STAGNANT AT BEST

Radio has had little impact on TV's fortunes for decades, and that's unlikely to change. BIA/Kelsey reports that there are 29 all-news radio stations in the U.S. There are 438 stations that say they're news/talk, but many of those are almost all talk and have few — and in many cases no — reporters. The median number of news employees at U.S. radio stations has remained at one for decades. As it is, a third of all radio news directors aren't even full-time station employees. The average number of news people at non-commercial stations is 3.3 but the median (typical) number is two. And 41 percent of non-commercial radio news directors are not full-time employees of their stations.

Total radio advertising revenue is now slightly higher than total newspaper advertising revenue. That's not because radio has grown but because newspaper has fallen. Radio advertising and listenership have both largely held steady. Nielsen Media Research reports that, overall, news/talk/information is the most popular single radio format with 9.6 percent of all listeners.[15]

Nielsen also reports a surge in listening to news[16] and talk since the last presidential election.[17] News/talk reached 10.2 percent of all radio listening (age 6+) in March 2017, although that was down slightly from February. All-news stations have not been growing nearly as rapidly as news/talk stations, and while commercial all news and news/talk stations both dominate the field, non-commercial stations have actually been growing more rapidly.

Few public stations outside some of the largest markets are really major players in local news.

Nielsen reports that millennials have gone up almost a point in listening to news/talk radio in the past year, but they're still at half the percentage level of the overall 6+ radio audience.[18]

News is a business, and without bringing in more revenue than an enterprise is paying out in expenses, the future becomes difficult to see. NPR stations have succeeded heavily on listener support, but NPR reports that 14 percent of local station revenue comes, directly and indirectly, from federal, state and local governments. That continued level of support is uncertain and under attack. Regardless, few public stations outside some of the largest markets are really major players in local news.

TV AND NEWSPAPERS STILL DOMINATE ONLINE

Most online news is produced by legacy media: newspapers, magazines, television stations, radio stations. But what about online-only news sources? How do they fit into the picture? Are they making money? Are they having an impact?

In our study of dozens of markets across a wide range of sizes, we found that commercial TV and newspapers dominate local news online. (See the appendix for a full discussion and analysis of our comparison of online media audience.)

Public TV websites are virtual non-entities. Some public radio websites are meaningful suppliers of news and information, although the combined totals of public radio and television websites never reached 10 percent of a city's online news consumption, and those public radio and television websites were under 1 percent reach in more than half of the cities in our initial analysis. The numbers were even lower in smaller markets, except for Kirksville, MO/Ottumwa, IA (market 200), where just 1,640 daily visitors brought the public station to 22 percent of total online news consumption.

Of the 22 markets initially analyzed (excluding New York City and Washington, D.C. with its three national newspapers), newspaper websites came out on top in 14 of the markets, and television websites came out on top in eight.

Of the 37 smaller markets analyzed, numbers 25 to 205, television websites came out on top in 23, newspapers came out on top in 13, and radio came out first in one.

It turns out that there are surprisingly few online-only information websites that generate enough traffic to stand much chance of being self-supporting.

In the larger markets, commercial radio station websites are non-factors in local news online. They reached under 1 percent of the population in 16 of the initial markets analyzed and peaked at 2.3 percent. Smaller markets were a different story. In 17 of the smaller 37 markets, commercial radio supplied under 1 percent of online news, and the median was just 1 percent. But several markets were in mid or upper single digits or even a bit higher. And one radio website beat everyone else in the market — TV and newspaper. Lost Coast Communications in Eureka, CA (market 195) edged out TV for overall first place in online news. That was the only example we found in any size market where the leader wasn't either commercial TV or newspaper.

Online only news websites posed more of an analysis challenge. A survey conducted by a columnist in the Los Angeles Times in 2015 found that "one of every four (online) news start-ups has failed."[19] In 2015, Joshua Benton wrote an article in NiemanLab on local online websites using Michele's List. Michele McLellan maintains her list of local online sites based on the criteria that those listed websites must be "progressing" on "three fronts — content, engagement and revenue."

We used Michele's List[20] in an attempt to get an idea of what it takes to have what might be considered a self-supporting local news website — however modest.

Michele's List includes 378 sites all across the country. For purposes of analysis, we looked only at local websites in 24 local markets (see the appendix for details).

Counting only those that received advertising revenues, if we say that a website had to take in at least $100,000 in revenue a year to have a chance at being self-supporting, then, on average, how many visitors per day does that site need to achieve that goal? The average number of daily visitors at sites producing $100,000 or less in annual revenue is 1,210. The average number of daily visitors at sites producing $101,000 or more is 5,510. Obviously, that's not an absolute standard, and there were a couple of exceptions on either side of the equation, but it's a starting point, and will come in handy as we try to determine to what extent local-only websites might play a significant role in a community's media mix.

It turns out that there are surprisingly few online-only information websites that generate enough traffic to stand much chance of being self-supporting.

Online-only websites are making a mark, but it's primarily a major market phenomenon. Of 153 online-only websites analyzed in 56 markets, only 26 sites reached at least 5,500 visitors a day. Three more sites came fairly close. That's 19 percent of the total. And 7 of those 29 sites are non-profit. Of those 29 online-only websites, 18 are located in five of the seven largest markets in the U.S.: New York, Los Angeles, Chicago, Philadelphia and Washington, DC. Several have been shut down since this analysis was done. Ownership complained that the sites weren't financially feabile — and those were among the most successful in audience reached. The few successful exceptions in smaller markets prove that stand-alone online news sites are possible, but the numbers strongly suggest that we're a long way from stand-alone news websites as a major factor in local news.

The bottom line is that the primary suppliers of local news online remain newspapers (primarily core city dailies) and television stations (primarily the big four network affiliates). While newspapers have a clear edge in supplying online news in the very largest markets, newspaper websites appear to be running behind TV websites in most of the markets outside of the top 25.

BUT TV DOMINATES SOCIAL MEDIA

Media outlets are spending more of their time on social media, particularly Facebook and Twitter, but the revenue picture in social media is fuzzy at best. Right now, media outlets derive most of their digital dollars from website advertising, but we would suggest that the future appears to be social media — even if monetization of social media is creating a revenue stream for only a few news outlets.

The available data for social media is not directly parallel to the data we used in analyzing news websites. For most of the 24 markets included in our sample, we have no data for radio station or online-only local websites or for public radio and television stations. In most cases, we are simply looking at social media for television stations and newspapers.

The social media data comes from Share Rocket, and the full dataset and analysis can be found in the appendix.

Excluding the skewed markets of New York City and Washington, D.C.,[21] the median social media share for all TV was 85.5 percent, and the median share for all newspaper was 11.7 percent. With one exception, radio social media share ranged from 3.3 percent in Montgomery, AL to 10 percent in Chicago. Only one market includes any online only sites: Philadelphia, which included three. The Los Angeles mixture includes a daily paper, 2 weeklies, a monthly magazine, an LA Times app and the local NPR affiliate. Again, the numbers for social media share were quite low, but — as with radio — the sample size is too small to be certain about the results.

Note that, relatively speaking, newspapers frequently have disproportionately high numbers in the "Voice" category. That's the outgoing messages from the media. In other words, newspapers are sending out a lot of messages — primarily tweets. But the key measure in social media is engagement, and these numbers back up the Shareablee findings (noted in more detail in the innovation and social media section) that indicate more posting doesn't equate to more engagement or overall success in social media. It could just mean you're bothering people a lot.

"You expect newspapers to do better online because they still have tonnage," notes Sean McLaughlin, vice president news at Scripps. "They still have a lot of local content. But social media really plays to our strengths [in TV]: timely, emotional, video. We really know those things. That's what we do. Video is native to us. We have a ton of video, and we're used to performing in a live environment. The advantage of strength in social media is that you're positioning your brand so when people do go on air, online, they know and trust your brand. If we're successful in social media, that says a lot about success of the brand. There may not be money in this now, but there will be down the road."

CONCLUSION

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Make no mistake, financial success in local TV news is much harder to come by today than it was a decade ago, before the economic crisis of 2008. Though the business is still profitable, there are concerns about the diminishing quality of local TV content and whether profits can be sustained without widespread innovation.

In Part 2 of this project, we explore what some of the most entrepreneurial stations are doing to grow audiences and revenue, along with a comprehensive data analysis showing the impact of social media on newscast ratings. Part 3 focuses on the future of news video — from social distribution to mobile to web to OTT — we analyze the role local TV will play in the digital news video ecosystem. Part 4 offers insight into what industry leaders think must happen to boost the content standards in local television news, along with the authors' recommendations for improvement following an 18-month analysis of the industry.

No other existing news medium appears to have more advantages right now than local TV news. But the question remains, whether industry leaders will squander their opportunities or will leverage their strengths, evolve and improve.

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21. New York and Washington, DC include three national newspapers (The New York Times, Wall Street Journal and Washington Post), and their national data skew any comparisons with television.

ABOUT THE RESEARCHERS

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BOB PAPPER is Emeritus Distinguished Professor of Journalism at Hofstra University. For 24 years, he has overseen the RTDNA/Hofstra University Annual Survey on the state of local radio and television news. His "Broadcast News and Writing Stylebook" is in its sixth edition, and he's the founder and co-editor of Electronic News, the official journal of the Electronic News Division of the Association for Education in Journalism and Mass Communication. He's worked at television stations in Minneapolis, Washington, D.C., San Francisco, and Columbus, Ohio, and is a past president of the Maine Association of Broadcasters. He has won more than 100 state, regional and national awards, including more than a dozen regional Edward R. Murrow Awards and an Alfred I. duPont-Columbia University Award for "Excellence in Broadcast Journalism." In 2012, he received the Ed Bliss Award, the highest honor from the Electronic News Division of the Association for Education in Journalism and Mass Communication.

APPENDIX

STATE OF THE INDUSTRY: METHODOLOGY AND DATA

NEWSPAPER CIRCULATION AS A PERCENT OF U.S. HOUSEHOLDS

YEAR	U.S. HOUSEHOLDS	WEEKDAY MCIRCULATION	NEWSPAPER CIRCULATION AS A % OF AVAILABLE HOUSEHOLDS	DECLINE FROM PREVIOUS 5 YEAR MARKER	PERCENT DECLINE OF CIRCULATION PERCENT
1940	34.9	41.1	117.8%		
1947	39.1	51.7	132.2%	+14.4	+12.2%
1950	43.6	53.8	123.4%	8.8	-6.7%
1955	47.9	56.1	117.1%	6.3	-5.1%
1960	52.8	58.9	111.5%	5.6	-4.8%
1990	93.4	62.3	66.8%	5.5	-7.6%
1995	99	58.2	58.8%	8	-12%
2000	104.7	55.8	53.3%	5.5	-9.4%
2005	113.3	53.3	47.1%	6.2	-11.6%
2010	117.5	45*	38.3%	8.8	-18.7%
2015	124.6	37.7	30.3%	8	-20.9%
2016	125.8	34.7	27.5%	2.8	-9.2%

**2010 is extrapolated between 2009 and 2011.*

As a percentage of available U.S. households, newspapers have been in a relentless circulation decline for decades — with the biggest five-year drops coming between 2005 to 2010 and 2010 to 2015 — both, long after the internet came along. The third biggest percentage drop came in 1970 to 1975, and the fourth largest came in 1990 to 1995.

NEWSPAPER CHANGE IN ADVERTISING OVER TIME

FROM YEAR TO YEAR	CHANGE IN DIGITAL DOLLARS	CHANGE IN NON-DIGITAL ADVERTISING	CHANGE IN TOTAL ADVERTISING
2011–2012	+4.3% to $4.8 B	-8.1% to $20.5 B	-6.5% to $27.1 B
2012–2013	-0.2% to $4.7 B	-7.8% to $18.9 B	-6.8% to $25.3 B
2013–2014	2.1% to $4.6 B	-7.4% to $17.5 B	-6.4% to $23.6 B
2014–2015	+10.9% to $5.1 B	12.6% to $15.3 B	-7.8% to $20.4 B
2015–2016	3.9% to $5.3 B	-15% to $13 B	-10.3% to $18.3 B

NEWSPAPER EMPLOYMENT OVER TIME

Full time newspaper employment has dropped precipitously over the years:

YEAR	FULL TIME NEWSPAPER EMPLOYMENT[21]
1996	55,000
2000	56,200
2005	54,134
2010	41,500
2015	32,900
2016	30,700

ONLINE NEWS CONSUMPTION BY MARKET

Using Share Rocket's list of markets for social media comparison, we started by looking up website users. For all 24 markets, we broke down media in five major groups:

- Commercial TV (which was combined with local cable news where appropriate)
- Public radio and public TV (combined)
- Commercial news, news/talk and talk radio stations (in other words, information-oriented radio)
- Newspaper (which combined local daily, weekly and monthly)
- Freestanding online news sites (where visitor counts were possible)

24 markets evaluated:

- Atlanta, GA (TV market 9)
- Austin TX (TV market 39)
- Chicago, IL (TV market 3)
- Columbus, GA/Opelika, AL (TV market 127)
- Dallas/Ft. Worth, TX (TV market 5)
- Detroit, MI (TV market 14)
- Erie, PA (TV market 150)
- Hartford/New Haven, CT (TV market 32)
- Honolulu, HI (TV market 66)
- Houston, TX (TV market 7)
- Los Angeles, CA (TV market 2)
- Medford/Klamath Falls, OR (136)
- Minneapolis/St. Paul, MN (TV market 15)
- Montgomery/Selma, AL (TV market 124)
- New York City, NY (TV market 1)
- Orlando/Daytona Beach/Melbourne, FL (TV market 18)
- Philadelphia, PA (TV market 4)
- Phoenix/Prescott, AZ (TV market 11)
- Sacramento/Stockton/Modesto, CA (TV market 20)
- Salt Lake City, UT (TV market 30)
- San Francisco/Oakland/San Jose, CA (TV market 8)
- Tampa/St. Petersburg/Sarasota, FL (TV market 13)
- Washington, DC (TV market 6)
- West Palm Beach/Ft. Pierce, FL (TV market 37)

Each site's daily visitors were tabulated based on reports from Easycounter.com. Totals for each media outlet were combined by category and percentages derived by dividing the total number of daily visitors into each media category's combined numbers. In other words, the number of daily visitors to each TV station were combined into a TV number ... as were newspaper numbers and so on. Those combined numbers were used to calculate the overall daily visitor share to each of the above categories. Obviously, visits are not necessarily exclusive, so a visitor could well be included on more than one site, but this still provides a reasonable overview of where people are going for local news online.

Since the purpose of this examination involves where local people search for (primarily) local news, we need to exclude New York City and Washington, DC. The three national papers defeat the purposes of the analysis, and excluding just those papers would also skew the results — especially in the case of Washington, DC.

Overall, here's the median (typical) breakdown of daily site visitors by medium:

TV	40.6%
PUBLIC RADIO/TV	1%
COMMERCIAL RADIO	0.4%
NEWSPAPER	53.9%
ONLINE ONLY	1%

Note that the percentages will not add up to 100 percent because median (or typical) numbers are calculated independently within each category.

As noted above, the sample group is skewed toward the largest markets. Fifteen of the 24 markets in this analysis are in the top 25. They represent 28 percent of the U.S. population. Just over half the population of the U.S. lives outside the top 25 TV markets (there are a total of 210 TV markets, which include every county in the U.S.). The remaining nine stations in our analysis represent just 4.08 percent of the population of the U.S., but do smaller markets exhibit different local online news consumption patterns than the very largest markets?

Here's the median breakdown of daily site visits by medium for the nine smallest markets (markets 30 to 150):

TV	44.7%
PUBLIC RADIO/TV	2.5%
COMMERCIAL RADIO	0.1%
NEWSPAPER	38.4%
ONLINE ONLY	0%

Again, the percentages will not add up to 100 percent because median (or typical) numbers are calculated independently within each category.

Since there are indications in the numbers that market size matters, we decided to expand our check on online website users in a sample of markets beyond the very largest. We ran the numbers for every fifth market starting with number 25. We also conducted a search for online only websites in those markets.

While it's clear that newspapers are the primary supplier of online news in the very largest markets, that's not the case in markets below that top group. In our sample of 37 markets starting at number 25 (representing slightly more than half the U.S. population), we find that, overall, TV online sites generate more traffic than newspaper sites by a margin of 24 to 13. The best way to see the overall percentages is to use median numbers:

TV	51.6%
PUBLIC RADIO/TV	1.8%
COMMERCIAL RADIO	1%
NEWSPAPER	38.4%
ONLINE ONLY	2.9%

Note, again, that the percentages will not add up to 100% because median (or typical) numbers are calculated independently within each category.

The sample size is large enough to strongly suggest that there is likely to be a significant difference in the source of online news depending on market size.

Each site's daily visitors were tabulated based on reports from Easycounter.com. Totals for each media outlet were combined by category and percentages derived by dividing the total number of daily visitors into each media category's combined numbers. In other words, the number of daily visitors to each TV station were combined into a TV number ... as were newspaper numbers and so on. Those combined numbers were used to calculate the overall daily visitor share to each of the above categories. Obviously, visits are not necessarily exclusive, so a visitor could well be included on more than one site, but this still provides a reasonable overview of where people are going for local news online. Numbers in parenthesis after each genre denote the number of outlets combined to arrive at the total. Where a single outlet provided an overwhelming percentage of the total, that's also noted.

ATLANTA, GA (9):

TV	43.6% (4)
PUBLIC RADIO/TV	2.6% (mostly radio)
COMMERCIAL RADIO	2.1% (5) (all WSB)
NEWSPAPER	50.6% (2) (almost all Atlanta Constitution)
ONLINE ONLY	1.1% (6)

AUSTIN, TX (39):

TV	43% (4)
PUBLIC RADIO/TV	4.7% (2) (mostly radio)
COMMERCIAL RADIO	0.5% (2)
NEWSPAPER	28.7% (3)
ONLINE ONLY	23.1% (8) (most of which came from a statewide site based on Austin)

CHICAGO, IL (3):

TV	25% (6)
PUBLIC RADIO/TV	2% (2)
COMMERCIAL RADIO	0.8% (7)
NEWSPAPER	63.9% (5)
ONLINE ONLY	8.2% (11)

COLUMBUS, GA (127):

TV	42.8% (4)
PUBLIC RADIO/TV	0 (2)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	57.2% (1)
ONLINE ONLY	0

DALLAS, TX (5):

TV	40.8% (5)
PUBLIC RADIO/TV	0.9% (2)
COMMERCIAL RADIO	1.5% (6)
NEWSPAPER	56.8% (7)
ONLINE ONLY	0 (1)

DETROIT, MI (14):

TV	26.1% (4)
PUBLIC RADIO/TV	0.6% (2)
COMMERCIAL RADIO	0.3% (4)
NEWSPAPER	71.9% (5)
ONLINE ONLY	1% (6)

ERIE, PA (150):

TV	44.7% (2)
PUBLIC RADIO/TV	2.5% (2)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	52.8% (3)
ONLINE ONLY	0 (0)

HARTFORD/NEW HAVEN, CT (32):

TV	41.2% (4)
PUBLIC RADIO/TV	4.9% (2) (mostly radio)
COMMERCIAL RADIO	1.2% (4)
NEWSPAPER	40.7% (5)
ONLINE ONLY	12% (7)

HONOLULU, HI (66):

TV	57.9% (3)
PUBLIC RADIO/TV	2.2% (3)
COMMERCIAL RADIO	0.4% (4)
NEWSPAPER	29.9% (1)
ONLINE ONLY	9.6% (3)

HOUSTON, TX (7):

TV	10.3% (6)
PUBLIC RADIO/TV	0.3% (2)
COMMERCIAL RADIO	0.4% (5)
NEWSPAPER	88.9% (11) (but almost all came from Houston Chronicle)
ONLINE ONLY	0 (0)

LOS ANGELES, CA (2):

TV	17.6% (6)
PUBLIC RADIO/TV	1.7% (2) (almost all from radio)
COMMERCIAL RADIO	0.6% (5)
NEWSPAPER	79.3% (8) (but mostly from LA Times)
ONLINE ONLY	0.8% (11)

MEDFORD, OR (136):

TV	67.6% (4)
PUBLIC RADIO/TV	9.7% (2) (mostly radio)
COMMERCIAL RADIO	0 (2)
NEWSPAPER	22.7% (1)
ONLINE ONLY	0 (0)

MINNEAPOLIS/ST. PAUL, MN (15):

TV	33.1% (5)
PUBLIC RADIO/TV	0.9% (2) (mostly radio)
COMMERCIAL RADIO	0.1% (3)
NEWSPAPER	63.2% (6) (mostly Star Tribune)
ONLINE ONLY	2.6% (5)

MONTGOMERY, AL (124):

TV	55% (4)
PUBLIC RADIO/TV	6.6% (2)
COMMERCIAL RADIO	0 (2)
NEWSPAPER	38.4% (1)*
ONLINE ONLY	0 (0)

NEW YORK CITY, NY (1):

TV	2.1% (9)
PUBLIC RADIO/TV	0.6% (2) (virtually all radio)
COMMERCIAL RADIO	0.1% (6)
NEWSPAPER	96.9% (15) (NYT is 2/3 of total)
ONLINE ONLY	0.3% (28)

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ORLANDO, FL (18):

TV	53.3% (5)
PUBLIC RADIO/TV	0.5% (2) (all radio)
COMMERCIAL RADIO	1.9% (4)
NEWSPAPER	43.4% (3) (mostly Sentinel)
ONLINE ONLY	0.9% (1)

PHILADELPHIA, PA (4):

TV	31.4% (6)
PUBLIC RADIO/TV	1% (2)
COMMERCIAL RADIO	0 (4)
NEWSPAPER	56.4% (7)
ONLINE ONLY	11.2% (12)

PHOENIX, AZ (11):

TV	26.1% (5)
PUBLIC RADIO/TV	1.5% (2) (mostly radio)
COMMERCIAL RADIO	2.3% (2)
NEWSPAPER	69.9% (3)
ONLINE ONLY	1.1% (2)

SACRAMENTO, CA (20):

TV	39.7% (5)
PUBLIC RADIO/TV	2.5% (2)
COMMERCIAL RADIO	1.8% (5)
NEWSPAPER	54.9% (3)
ONLINE ONLY	1.1% (1)

SALT LAKE CITY, UT (30):

TV	62.4% (5)
PUBLIC RADIO/TV	0.7% (3)
COMMERCIAL RADIO	0.1% (8)
NEWSPAPER	36.5% (6)
ONLINE ONLY	0.2% (3)

SAN FRANCISCO, CA (8):

TV	20.8% (7)
PUBLIC RADIO/TV	8.9% (2)
COMMERCIAL RADIO	0.4% (6)
NEWSPAPER	50.8% (9) (half is San Jose Mercury News)
ONLINE ONLY	19.1% (21)

TAMPA, FL (13):

TV	49.3% (5)
PUBLIC RADIO/TV	0.3% (2)
COMMERCIAL RADIO	1.6% (7)
NEWSPAPER	45.8% (9)
ONLINE ONLY	4.1% (1)

WASHINGTON, DC (6):

TV	2.4% (5)
PUBLIC RADIO/TV	0.3% (2) (3/4 is radio)
COMMERCIAL RADIO	1.6% (7)
NEWSPAPER	94.7% (6) (mostly Washington Post)
ONLINE ONLY	1% (10)

WEST PALM BEACH, FL (37):

TV	33.1% (4)
PUBLIC RADIO/TV	0.2% (2)
COMMERCIAL RADIO	0.3% (4)
NEWSPAPER	66.4% (4)
ONLINE ONLY	0 (0)

Since the purpose of this examination involves where local people search for (primarily) local news, we need to exclude New York City and Washington, DC. The three national papers defeat the purposes of the analysis, and excluding just those papers would also skew the results — especially in the case of Washington, DC.

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Overall, here's the median (typical) breakdown of daily site visitors by medium:

TV	40.6%
PUBLIC RADIO/TV	1%
COMMERCIAL RADIO	0.4%
NEWSPAPER	53.9%
ONLINE ONLY	1%

Since there are indications in the numbers that market size matters, we decided to expand our check on online website users in a sample of markets beyond the very largest. We ran the numbers for every fifth market starting with number 25. We also conducted a search for online only websites in those markets:

PORTLAND, OR (22 – PREVIOUSLY 25):

TV	50% (4)
PUBLIC RADIO/TV	3.6% (2)
COMMERCIAL RADIO	0.5% (3)
NEWSPAPER	45.9% (3) (mostly Oregonian)
ONLINE ONLY	0 (1)

HARTFORD/NEW HAVEN, CT (32 – PREVIOUSLY 30):

TV	50% (4)
PUBLIC RADIO/TV	3.6% (2)
COMMERCIAL RADIO	1.2% (4)
NEWSPAPER	40.7% (5)
ONLINE ONLY	12% (7)

MILWAUKEE, WI (36 – PREVIOUSLY 35):

TV	36.3% (5)
PUBLIC RADIO/TV	1.2% (1)
COMMERCIAL RADIO	2.2% (3)
NEWSPAPER	44.1% (2)
ONLINE ONLY	16.2% (4) (mostly onmilwaukee.com)

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LAS VEGAS, NV (40):

TV	34% (4)
PUBLIC RADIO/TV	1.5% (1)
COMMERCIAL RADIO	1% (3)
NEWSPAPER	63.5% (2)
ONLINE ONLY	none found

GREENSBORO/HIGH POINT/WINSTON-SALEM, NC (48 – PREVIOUSLY 46*):

TV	69.2% (4)
PUBLIC RADIO/TV	2.1% (1)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	27.8% (4)
ONLINE ONLY	0.9% (1)

**Birmingham, AL is the 40th market, but the newspaper is part of a statewide online effort, and there's no way to separate local market data from the statewide data. Greensboro is the closest market in size to Birmingham.*

NEW ORLEANS, LA (51 – PREVIOUSLY 50):

TV	42.4% (4)
PUBLIC RADIO/TV	0.9% (1)
COMMERCIAL RADIO	1.9% (2)
NEWSPAPER	54.5% (1)
ONLINE ONLY	0.3% (1)

The Advocate, a statewide paper, was not included

RICHMOND, VA (55):

TV	59.4% (4)
PUBLIC RADIO/TV	1% (1)
COMMERCIAL RADIO	0 (2)
NEWSPAPER	39.6% (1)
ONLINE ONLY	none found

PENSACOLA, FL/MOBILE, AL (59 – PREVIOUSLY 60):

TV	57.8% (4)
PUBLIC RADIO/TV	2% (2)
COMMERCIAL RADIO	0.9% (5)
NEWSPAPER	33.3% (1)
ONLINE ONLY	6% (1)

The Mobile Press-Register is not included because its online presence is part of a statewide grouping

HONOLULU, HI (66 – PREVIOUSLY 65):

TV	57.9% (3)
PUBLIC RADIO/TV	2.2% (3)
COMMERCIAL RADIO	0.4% (4)
NEWSPAPER	29.9% (1)
ONLINE ONLY	9.6% (3)

CHARLESTON, WV (73 – PREVIOUSLY 70):

TV	70.1% (5)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	0 (1)
NEWSPAPER	29.9% (2)
ONLINE ONLY	none found

Metro News and WV Public Radio were not included because only statewide numbers are available

SPRINGFIELD, MO (75):

TV	66.6% (4)
PUBLIC RADIO/TV	1.1% (1)
COMMERCIAL RADIO	2.1% (4)
NEWSPAPER	30.2% (1)
ONLINE ONLY	none found

MADISON, WI (81 – PREVIOUSLY 80):

TV	38.6% (2)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	0 (1)
NEWSPAPER	55.7% (1)
ONLINE ONLY	5.7% (2)

Public radio was not included because only statewide numbers are available

SYRACUSE, NY (85):

TV	9% (2)
PUBLIC RADIO/TV	1% (2)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	83.1% (2) (almost all The Post Standard)
ONLINE ONLY	none found

CEDAR RAPIDS, IA (91 – PREVIOUSLY 90):

TV	60.9% (3)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	0 (2)
NEWSPAPER	36.5% (1)
ONLINE ONLY	2.6% (1)

Public radio was not included because only statewide numbers are available

JACKSON, MS (95):

TV	41.8% (4)
PUBLIC RADIO/TV	0 (1)
COMMERCIAL RADIO	1.5% (3)
NEWSPAPER	54.6% (4) (primarily the Clarion Ledger)
ONLINE ONLY	2.1% (1)

NEW BERN/GREENVILLE, NC (100):

TV	75.7% (3)
PUBLIC RADIO/TV	1% (1)
COMMERCIAL RADIO	0 (2)
NEWSPAPER	20.4% (2)
ONLINE ONLY	2.9% (2)

LINCOLN, NE (106 – PREVIOUSLY 105):

TV	30% (4)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	2.3% (3)
NEWSPAPER	67.7% (1)
ONLINE ONLY	none found

Public radio was not included because only statewide numbers are available

FT. WAYNE, IN (111 – PREVIOUSLY 110):

TV	68.4% (3)
PUBLIC RADIO/TV	1.8% (1)
COMMERCIAL RADIO	4.1% (1)
NEWSPAPER	25.7% (2)
ONLINE ONLY	none found

YOUNGSTOWN, OH (117 – PREVIOUSLY 115):

TV	62.3% (3)
PUBLIC RADIO/TV	0 (1)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	37.7% (2)
ONLINE ONLY	none found

LAFAYETTE, LA (121 – PREVIOUSLY 120):

TV	66.4% (3)
PUBLIC RADIO/TV	1.9% (1)
COMMERCIAL RADIO	7.7% (2)
NEWSPAPER	21.1% (1)
ONLINE ONLY	2.9% (1)

SALINAS/MONTEREY, CA (125):

TV	72.2% (3)
PUBLIC RADIO/TV	2.5% (1)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	25.3% (2)
ONLINE ONLY	none found

WILMINGTON, NC (130):

TV	45.7% (3)
PUBLIC RADIO/TV	1.5% (1)
COMMERCIAL RADIO	–
NEWSPAPER	17.5% (1)
ONLINE ONLY	35.3% (1)

TOPEKA, KS (139 – PREVIOUSLY 135):

TV	45.7% (3)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	3.2% (3)
NEWSPAPER	50.9% (2) (Essentially all the Capital Journal)
ONLINE ONLY	none found

Public radio was not included because only statewide numbers are available

BISMARCK/MINOT, ND (141 – PREVIOUSLY 140):

TV	55% (3)
PUBLIC RADIO/TV	3.8% (1)
COMMERCIAL RADIO	0 (2)
NEWSPAPER	41.2% (2)
ONLINE ONLY	none found

One of the TV station's website was not included because it's merged with Fargo

LUBBOCK, TX (145):

TV	44.8% (3)
PUBLIC RADIO/TV	1.7% (1)
COMMERCIAL RADIO	3.7% (1)
NEWSPAPER	49.8% (1)
ONLINE ONLY	none found

ERIE, PA (150):

TV	44.7% (2)
PUBLIC RADIO/TV	2.5% (2)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	52.8% (3)
ONLINE ONLY	none found

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TERRE HAUTE, IN (155):

TV	65.3% (2)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	9.4% (2)
NEWSPAPER	25.3% (1)
ONLINE ONLY	none found

BINGHAMTON/JOHNSON CITY/VESTAL, NY (161 – PREVIOUSLY 160):

TV	53.1% (3)
PUBLIC RADIO/TV	1.9% (1)
COMMERCIAL RADIO	1% (1)
NEWSPAPER	44% (2)
ONLINE ONLY	none found

ABILENE, TX (165):

TV	79% (3)
PUBLIC RADIO/TV	0 (1)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	21% (1)
ONLINE ONLY	none found

QUINCY, IL (172 – PREVIOUSLY 170):

TV	52.9% (2)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	8.7% (2)
NEWSPAPER	38.4% (1)
ONLINE ONLY	none found

Public radio was not included because it's from St. Louis

ELMIRA, NY (176 – PREVIOUSLY 175):

TV	81.4% (3)
PUBLIC RADIO/TV	3.7% (1)
COMMERCIAL RADIO	3.7% (1)
NEWSPAPER	11.2% (2)
ONLINE ONLY	none found

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ISHPEMING/MARQUETTE/NEGAUNEE, MI (180):

TV	32.1% (3)
PUBLIC RADIO/TV	0 (1)
COMMERCIAL RADIO	0 (1)
NEWSPAPER	45.3% (1)
ONLINE ONLY	22.6% (1)

BOZEMAN/BUTTE, MT (185):

TV	35.1% (4)
PUBLIC RADIO/TV	0 (1)
COMMERCIAL RADIO	2.8% (1)
NEWSPAPER	62.1% (2)
ONLINE ONLY	0 (1)

MERIDIAN, MS (191 – PREVIOUSLY 190):

TV	73.7% (2)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	0 (1)
NEWSPAPER	26.3% (1)
ONLINE ONLY	none found

Public radio was not included because only statewide numbers are available

EUREKA, CA (195):

TV	42.1% (3)
PUBLIC RADIO/TV	2.1% (1)
COMMERCIAL RADIO	43.9% (7) (But it's all Lost Coast Communications radio group and digital)
NEWSPAPER	11.9% (1)
ONLINE ONLY	none found (see commercial radio)

KIRKSVILLE, MO/OTTUMWA, IA (200):

TV	34.8% (2)
PUBLIC RADIO/TV	22.1% (1)
COMMERCIAL RADIO	14.8% (2)
NEWSPAPER	28.3% (2)
ONLINE ONLY	0 (1)

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HELENA, MT (205):

TV	26.4% (2)
PUBLIC RADIO/TV	–
COMMERCIAL RADIO	0 (2)
NEWSPAPER	73.6% (1)
ONLINE ONLY	none found

There is a market 210, Glendive, MT, but no TV station, radio station or newspaper had measureable online visitors.

ONLINE ONLY LOCAL NEWS SOURCES

Michele's List includes 89 websites in those 24 market areas. Of those 89 sites, 50 did not report the broad revenue estimates that Michele's List hopes that the sites will fill out. Of the 39 sites that did report revenue, 17 reported annual revenue of $50,000 or less; 8 reported $51,000 - $100,000; 8 reported $101,000 - $250,000; 3 reported $501,000 - $1 million and 3 reported $1 million+. Many of the bigger dollar sites operate via grants on a non-profit basis or are actually university-based and staffed primarily or solely by students. Those work as long as grant money (or student labor) keeps flowing, but they're certainly not self-supporting.

1. SFIST	sfist.com	news, food, arts and events
2. TEXAS TRIBUNE	texastruibune.org	member-supported public policy & politics
3. CHICAGOIST	chicagoist.com	news, food, arts and events
4. CHICAGO NOW	chicagonow.com	music, nightlife, events
5. DCIST	dcist.com	news, food, arts and events
6. PHILLY VOICE	phillyvoice.com	news, sports, entertainment
7. BERKELEYSIDE	berkeleyside.com	independent local news site
8. HOODLINE (SF)	hoodline.com	neighborhood news
9. CURBED SAN FRANCISCO	sf.curbed.com	real estate mostly
10. DO312	do312.com	what to do in Chicago

Within the initial 24 markets analyzed, just 10 online-only websites get 20,000 visitors a day or more:

Note that four of the 10 sites are in the Bay area; three are in Chicago; one each in Philadelphia, DC and Austin (and the Austin site is really a statewide site and is member-supported, not advertiser-supported). Six of the remaining sites focus on what to do in that city, and may get many of the visits from out-of-towners traveling there. One is mostly real estate, leaving Berkeleyside and Hoodline as the only two real local news sites of the bunch.

The relatively few online-only publications that appear to have a self-sustaining revenue model (based on number of readers) do not have staff sizes capable of covering a city at anywhere near the depth of a traditional newspaper -- or even a TV station. Philly Voice reports it has 30 staff members, and that's the largest online-only local news outlet we found among all the markets we analyzed. MinnPost.com has 23; Hoodline has 20. Berkeleyside appears to have eight full time, as does DCist.

The expanded analysis in markets 25 and smaller yielded just one more site that got 20,000 or more visitors a day: Onmilwaukee.com describes itself as a "daily lifestyle magazine" and appears to have 14 full time staff members. No other online only website within that 25+ market group had even half as many daily visitors.

SOCIAL MEDIA SHARE BY MARKET

The social media data comes from Share Rocket. The first number in the table will be a medium's Social Share. That's a Share Rocket-calculated number combining: Audience (fans and followers), Voice (outbound posts and tweets), and Engagement (likes, shares, comments, replies, re-tweets, @mentions, etc.).

METRO AREA	SOCIAL SHARE	AUDIENCE (in thousands)	VOICE (in thousands)	ENGAGEMENT (in thousands)
ATLANTA, GA:				
TV (4)	92.1%	93.39	1.46	276.73
Newspaper (1)	7.9%	23.4	0.52	18.43
AUSTIN, TX:				
TV (4)	90.8%	22.78	1.04	41.72
Newspaper (1)	9.2%	6.42	0.39	3.41
CHICAGO, IL:				
TV (7)	81.7%	159.93	1.43	420.59
Newspaper (2)	8.1%	43.14	0.99	33.2
Radio (35)	10.2%	65.94	1.62	37.97
COLUMBUS, GA:				
TV (4)	75.8%	5.03	0.4	9.4
Newspaper (6)	24.2%	2.31	0.12	2.94
DALLAS, TX:				
TV (7)	88.4%	116.68	1.6	214.83
Newspaper (2)	11.6%	28.93	0.86	23.53
DETROIT, MI:				
TV (4)	75.4%	51.0	0.51	107.31
Newspaper (2)	24.6%	30.74	0.76	30.15
ERIE, PA:				
TV (2)	67.0%	2.22	0.04	1.56
Newspaper (1)	33.0%	1.63	0.03	0.73
HARTFORD/NH, CT:				
TV (4)	90.8%	38.42	0.81	58.83
Newspaper (4)	9.2%	8.29	0.45	4.59
HONOLULU, HI:				
TV (4)	88.7%	22.25	0.32	39.3
Newspaper (1)	11.3%	6.45	0.1	4.35

METRO AREA	SOCIAL SHARE	AUDIENCE (in thousands)	VOICE (in thousands)	ENGAGEMENT (in thousands)
HOUSTON, TX:				
TV (7)	88.2%	121.31	1.31	219.21
Newspaper (3)	11.8%	28.65	1.09	22.99
LOS ANGELES, CA:				
TV (7)		79.1%	1.42	412.08
Newspaper (5)	19.3%	121.91	1.16	87.41
Mixture (5)	1.6%	28.37	0.13	5.45
MEDFORD, OR:				
TV (4)	92.6%	2.59	0.13	3.64
Newspaper (1)	7.4%	0.3	0.06	0.23
MPLS./ST. PAUL, MN:				
TV (4)	76.7%	44.28	0.76	62.8
Newspaper (2)	23.3%	15.64	0.66	17.59
MONTGOMERY, AL:				
TV (3)	86.7%	8.29	0.27	11.77
Newspaper (2)	10.0%	1.64	0.17	1.13
Radio (7)	3.3%	0.83	0.13	0.26
NEW YORK CITY, NY:				
TV (8)	29.7%	189.21	1.58	367.92
Newspaper (8)	64.4%*	236.65	2.65	778.25
Radio (3)	5.9%	212.43	0.36	52.98
ORLANDO, FL:				
TV (6)	94.2%	41.39	1.07	136.14
Newspaper (1)	5.8%	8.75	0.29	6.52
PHILADELPHIA, PA:				
TV (7)	80.1%	102.29	1.11	203.79
Newspaper (9)	16.7%	34.17	1.14	36.59
Online (3)	3.2%	4.15	0.42	6.15
PHOENIX, AZ:				
TV (6)	97.1%	87.94	0.86	332.66
Newspaper (2)	2.9%	7.89	0.28	4.47
SACRAMENTO, CA:				
TV (6)	84.2%	36.39	0.66	63.28
Newspaper (3)	15.8%	6.76	0.26	11.29

METRO AREA	SOCIAL SHARE	AUDIENCE (in thousands)	VOICE (in thousands)	ENGAGEMENT (in thousands)
SALT LAKE CITY, UT:				
TV (4)	74.7%	42.92	0.71	54.79
Radio (1)	4.0%	2.86	0.1	2.76
Newspaper (5)	21.3%	12.33	0.74	14.22
SAN FRANCISCO, CA:				
TV (7)	74.7%	72.02	1.06	141.51
Newspaper (4)	25.3%	31.02	0.92	44.33
TAMPA, FL:				
TV (5)	95.7%	66.12	0.84	394.14
Newspaper (1)	4.3%	8.79	0.5	8.45
WASHINGTON, DC:				
TV (5)	23.8%	65.08	1.37	118.3
Radio (1)	2.5%	6.21	0.39	9.8
Newspaper (2)	73.7%**	329.62	1.21	386.0
WEST PALM BEACH, FL:				
TV (4)	41.6%	20.94	0.7	29.27
Radio (18)	35.5%	31.6	1.96	23.77
Newspaper (2)	22.9%	17.37	0.63	15.35

Numbers are all average day based on May 31 – July 31, 2017

Numbers in parenthesis reflect number of media tabulated

**New York Times is 37.6% of total NYC share*

***Washington Post is 70.7% of total Washington, DC share*