



*Note: Citation terms and press contact information found on page 5.

Tuesday, January 31, 2012 5:10 PM ET SNL Kagan

TV stations multiplatform analysis '12 update: new digital networks, mobile TV channels expand content options

By [Justin Nielson](#)

We have [updated](#) our U.S. TV station database for 2012 to feature even more data and analysis on HD and digital multicast channel listings, including all live mobile DTV stations and channels along with those announced to launch by the end of the year. Also new for this year's edition is a breakout for every digital multicast and mobile TV network with the number of affiliates for each and the last five years' worth of M&A data when available for the 2,458 U.S. licensed TV stations in rated markets covered in the analysis.

Other changes to the 2012 version of the TV station database include a consolidation of U.S. commercial and noncommercial full-power TV stations, class A, low power TV and translators in one tab by owner and 2012 TV market rank. This improvement allows for easier sorting and filtering by FCC facility ID (column Q) or station type (column R) in the spreadsheet.

Please see [related spreadsheet](#) for the 2012 edition of the SNL Kagan TV Station Database.

Based on our updated 2012 analysis of digital TV station programming offerings (HD, multicasts and mobile TV), the total number of live over-the-air broadcast channels for the 1,726 full-power digital stations jumped to 4,552 from 2,518 at year-end 2010.

That year-over-year increase of 2,034 live digital and mobile TV channels in the U.S. has a lot to do with expanded multicast network programming options from new startups such as Antenna TV, Bounce TV, Live Well, This TV, Me-TV, The Cool TV, The Country Network and others expanding their reach to more than 600 stations.

Spanish-language digital TV channel availability over-the-air has nearly doubled year-over-year to 216 multicast channels and 10 live mobile TV channels with offerings from Hispanic broadcasters [Azteca America](#), [Latinoamérica Televisión](#), [Estrella TV](#), [Telemundo](#), [Telefutura](#) and [Univision](#).

Another innovation over the past year has been multiplexing two 720p HD channels in one station's broadcast spectrum, with [ABC Television](#) using the method on all of its eight owned-and-operated stations, programming ABC-HD on its primary channel and Live Well-HD network on its secondary channel. Other network affiliates programming two HD feeds — although to a lesser degree — include [CBS](#), [FOX](#), [NBC](#), [The CW](#), [MyNetworkTV](#), [PBS](#), V-Me and [Telefutura](#).

For reference, each FCC-licensed full-power digital TV station has been allocated 6 MHz or 19.39 Mbps of wireless spectrum to produce a 1080i or 720p format HD or 480i standard digital feed of its primary network during prime time and has extra bandwidth to produce multiple 480i standard digital secondary channels at about 3 Mbps per channel and up to four ATSC-M/H standard mobile TV simulcast or on-demand options using 1 Mbps to 2 Mbps per data channel.

In the 2012 edition of our TV station multiplatform analysis of full-power operating stations in rated markets, we have updated our rankings of the top 50 digital TV station groups by number of operating HD, digital multicast and mobile DTV channels.

Top 10 Digital Multicasting TV Station Groups

(By # of Operating SD+HD+Digital Multicast+ Mobile DTV Channels)*

Rk.	Company	---FP DTV Stns---			Digital			Live Mobile		Upcoming		Total		
		SD	HD	Total	% HD	Stns	Chs	MC'ing	Stns	Chs	Stns		Chs	% Stns
1	ION Media Networks, Inc.	3	57	60	95	59	129	98	12	22	0	0	20	211
2	Sinclair Broadcast Group, Inc.	59	59	100	57	95	97	97	1	1	5	5	10	160
3	Raycom Media, Inc.	40	40	100	38	60	95	3	3	4	4	18	107	
4	Gray Television, Inc.	1	33	34	97	33	60	97	2	3	0	0	6	97
5	NBC Television Stations	2	22	24	92	21	36	88	15	15	3	3	75	78
6	Hearst Corporation	2	33	35	94	30	37	86	3	3	0	0	9	75
7	Univision Communications, Inc.	3	35	38	92	23	26	61	2	5	0	0	5	69
8	Tribune Company	24	24	100	24	39	100	0	0	0	0	0	0	63
9	LIN TV Corp.	28	28	100	18	30	64	0	0	4	4	14	62	
10	Gannett Company Inc.	1	23	24	96	23	27	96	5	5	4	4	38	60

* Source: Company Reports and SNL Kagan Analysis of Rated TV Markets as of 12-31-11 (U.S. Commercial Full Power Digital Stations Only). Simulcast stations and Local Management Agreements are not counted towards company totals in this ranking. ** Stations signed on with the Open Mobile Video Coalition, Mobile Content Venture (Dyle TV), or Mobile500 Alliance for 2012 mobile DTV launch. © 2012 SNL Kagan, a division of SNL Financial LC, estimates. All rights reserved.

ION Media Networks Inc., with 60 full-power DTV stations, ranked first on our list again this year, with 57 HD stations and 59 multicasting stations delivering 129 secondary channels (Qubo children's programming and ION Life), along with 12 stations in the top 20 markets delivering 22 live mobile TV channels. That is double the amount of mobile TV offerings available from ION at year-end 2010.

ION Media CEO R. Brandon Burgess, who also serves as the president of the Open Mobile Video Coalition, has been an instrumental driver in the free over-the-air mobile TV initiative. The broadcaster is also part of the [Mobile Content Venture](#), now called Dyle TV, supported by 16 broadcast groups including networks FOX, NBC, Telemundo and Univision, as well as affiliate stations from [Bahakel Communications Ltd.](#), [Belo Corp.](#), [Cox Media Group Inc.](#), [E.W. Scripps Co.](#), [Gannett Co. Inc.](#), [Hearst Corp.'s Hearst Television Inc.](#), [Media General Inc.](#), [Meredith Corp.](#), [Washington Post Co.'s Post-Newsweek Stations Inc.](#) and [Raycom Media Inc.](#)

TV station pure-play [Sinclair Broadcast Group Inc.](#), with 59 full-power DTV stations, all in HD, ranked second by number of digital and mobile TV channels at 160. As of year-end 2011, Sinclair had only one live mobile station — WSYX-TV, a MyNet affiliation in Columbus, Ohio, although it plans to launch five more mobile TV stations this year in the markets of Milwaukee, Wis.; Greenville-Spartanburg, S.C.-Asheville, N.C.; Las Vegas; and Norfolk-Portsmouth-Newport News, Va.

Sinclair continues to be a leader among the TV pure-play groups when it comes to testing out new digital multicast network programming, with 36 stations broadcasting The Cool TV or The Country Network music programming on their second and third digital channels, nine stations with This TV network (older MGM films and TV shows) and three Universal Sports stations. The broadcaster has also added Spanish-language channels to five of its stations, including Estrella TV, LATV and Telemundo.

Moving up this year was Raycom Media, ranked third with 40 full-power digital stations all broadcasting in HD; 38 stations broadcasting 60 digital multicast channels; and three live mobile DTV channels, with four more scheduled to launch this year. Raycom's digital network affiliates include 24 stations carrying Bounce TV — a new network targeting [African-Americans launched](#) in September 2011 — 15 This TV stations, four Me-TV stations, three CBS, two Telemundo, one CW, one ABC, one FOX and one MyNet secondary affiliates along with its local news and weather programming.

Raycom's live mobile TV stations include FOX affiliates in Cincinnati, Ohio, and Knoxville, Tenn., and an NBC affiliate in Montgomery, Ala.. It plans to launch four more mobile TV stations this year, with a CBS affiliate in Charlotte, N.C., and Toledo, Ohio, as well as two more FOX affiliates in West Palm Beach-Fort Pierce, Fla., and Birmingham, Ala.

[Gray Television Inc.](#) ranked fourth with 34 full-power digital stations, including 33 broadcasting in HD and 33 multicasting 60 additional digital channels, and two live mobile TV stations in the markets of Omaha and Lincoln-Hastings-Kearney, Neb.

[Comcast Corp./NBCUniversal Media LLC](#)-owned NBC/Telemundo's O&Os ranked fifth with 24 full-power digital stations, 22 in HD, which multicast on 21 stations, including 36 additional channels of news, weather and sports, as well as Spanish-language political news and commentary network Inmigrante TV and Latino-focused network SOI.TV in the markets of New York; Chicago; Dallas; Houston; Las Vegas Phoenix; Miami-Ft. Lauderdale; and Tucson, Ariz.

NBC/Telemundo O&Os participating in Dyle TV have 15 operational mobile DTV channels, with three more scheduled to launch this year.

Hearst TV ranked sixth on our list of digital station groups, with 33 of its 35 full-power digital stations broadcasting in HD and 30 multicasting stations for a total of 37 additional digital channels and three live mobile TV NBC affiliate stations in the Orlando-Daytona Beach-Melbourne, Fla.; Cincinnati; and Greenville-Spartanburg, S.C.-Asheville, N.C., markets. The broadcaster has 11 of its stations broadcasting This TV network, nine Me-TV, six Estrella TV, two ABC and two CW+ secondary digital affiliates to go along with its own local weather and news programming.

Spanish-language broadcaster [Univision Communications Inc.](#) ranked seventh in our table for 2012, down one spot from last year's ranking with 38 full-power O&O TV stations, of which 35 broadcast in HD; 23 multicasting stations with 26 additional digital channels, mostly its secondary Telefuturo network; and two stations programming live mobile DTV content on a total of five channels in Los Angeles (KMEX) and Washington, D.C., (WFDC) which were part of

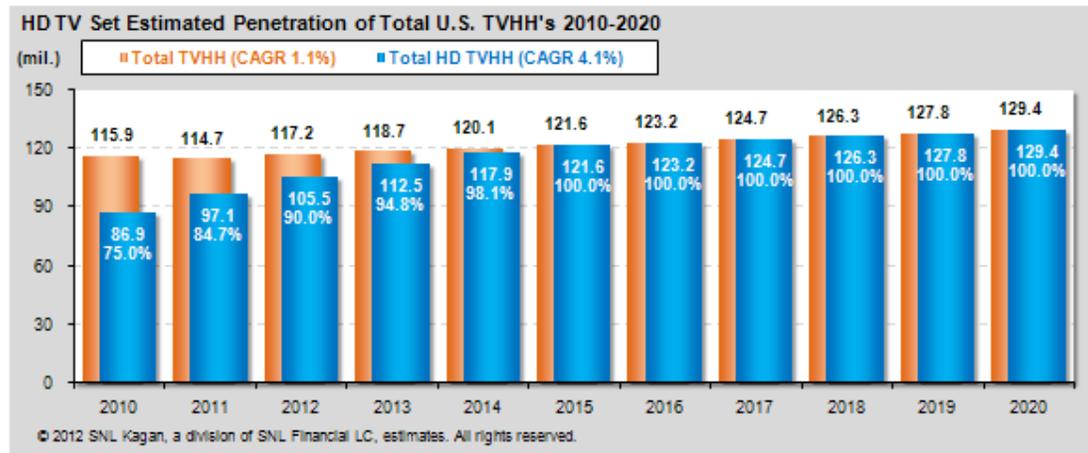
the initial consumer trials. Although the Hispanic broadcaster hasn't announced any new mobile TV stations yet, as part of the Dyle TV launch it is expected that number will increase substantially if the venture is a success.

Tribune Co. jumped from 12th to eighth in this year's ranking with 24 full-power digital TV stations all broadcasting in HD and all multicasting with a total of 39 additional digital channels led by the new network of Antenna TV with 17 affiliates, This TV on 14 stations, two Universal Sports channels, one Azteca America, one Estrella TV and one FOX secondary affiliate along with local news and weather programming. Based on our analysis as of year-end 2011, Tribune currently has no live mobile TV channels in operation.

Rounding out the top 10 digital multicasting TV station groups for 2012, LIN TV Corp. jumped one spot from 10th to ninth with 28 full-power digital TV stations all broadcasting in HD and 18 stations multicasting with a total of 30 additional digital channels and four upcoming mobile TV channels. Gannett Co. ranked 10th, falling two spots from last year with 23 stations multicasting 27 channels at year-end 2011 — roughly the same as reported at year-end 2010, although it has increased its mobile TV offerings, with five live channels and four scheduled to launch this year.

HDTV

At year-end 2011, based on the Consumer Electronics Association's estimates of HDTV retail set shipments of 29.7 million and an average number of TV sets per household of 2.7 with a 35% primary set replacement rate, we estimate HD-capable TV homes grew to 97.1 million, or 84.7% of total U.S. TV households. That is an increase of 10.2 million net new HD TV households from 86.9 million at year-end 2010, or 75% of total U.S. TV households.



Based on our analysis of U.S. digital full-power TV stations, as of the end of 2011, there were 1,501 broadcasting HD programming over the air either in 1080i or 720p video resolution, up from 1,036 stations as of the end of 2010. That represents 82.2% of the 1,726 full-power digital TV stations covered in our 2012 report.

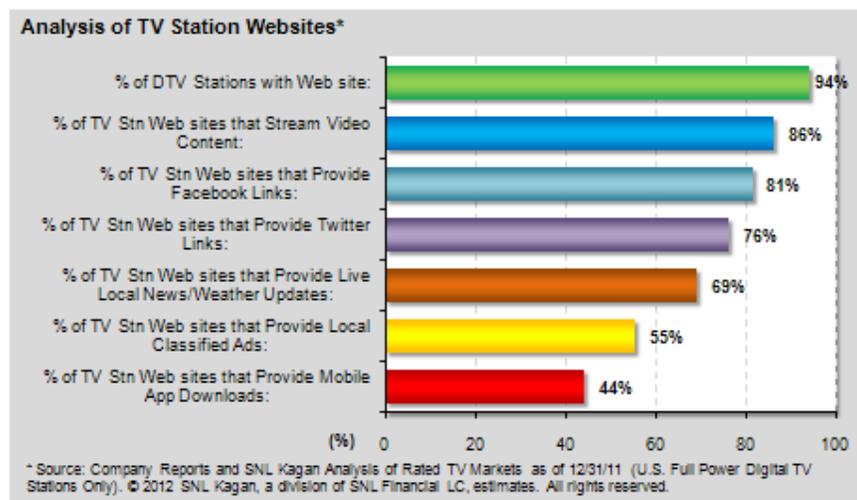
The most popular HD formats were the highest resolutions — 1080i for video and Dolby Digital 5.1 for audio — with 567 stations. However, the preferred method for multiplexing two HD channels on one broadcast TV station was 720p video and Dolby Digital 5.1 for audio, with 385 stations choosing this method, or 21.1%, although the majority were using the extra bandwidth to produce additional 480i standard digital multicast channels or separate mobile TV channels.

Analysis of HDTV Broadcasting			
2011			
High Definition Digital			
Video Audio	Stations	% of Total	
1080i DD5.1	567	31.1	
1080i DD2.0	330	18.1	
720p DD5.1	385	21.1	
720p DD2.0	219	12.0	
Total:	1,501	82.2	
Standard Definition Digital			
Video Audio	Stations	% of Total	
480i DD2.0	325	17.8	

© 2012 SNL Kagan, a division of SNL Financial LC, FCC data, Company Reports and SNL Kagan Analysis of Rated TV Markets as of 12/31/11 (U.S. Full Power Commercial Stations Only) and SNL Kagan estimates. All rights reserved.

TV station websites

TV station owners over the past year continued to develop their websites and new mobile apps as extensions of their local brands and strong market connections, as well as offering advertising clients more targeted and coordinated [online promotions](#) with their traditional spot ads.



Based on our research of 2,458 U.S. licensed TV stations in rated markets as of the end of 2011, 94% had a local website and nearly 86% streamed video content, with 69% providing local news and weather video updates and 55% providing a local classified advertisements section.

Social networking links to branded TV station pages on [Facebook Inc.](#) or [Twitter Inc.](#) were available on 81% and 76% of station websites, respectively. Mobile app downloads for smartphones were available on 850 or 44% of stations that had websites, although the majority were from mid-to-large-market TV stations only.

Mobile DTV

2012 should also be groundbreaking for broadcasters in that it will bring the first commercially available launch of live mobile TV channels on a major wireless carrier's handsets, based on an announced LG, Samsung and [MetroPCS Communications Inc.](#) partnership with Dyle TV, which includes 70-plus stations covering 33 TV markets and 50% of the U.S. population.

At the 2012 Consumer Electronics Show in Las Vegas, the OMVC again had a prominent central hall Mobile DTV Tech Zone and showcased phone handsets, laptops, tablets, in-car entertainment devices and iOS accessory prototypes that have a good chance to actually turn into viable consumer products available to a mass audience with major manufacturers including Audiovox, Belkin, Dell, LG, RCA and Samsung all geared up to take advantage of the new market for mobile DTV devices.

According to our analysis at year-end 2011, there were a total of 105 live mobile TV stations, with an additional 74 scheduled to go live in early 2012. As of the end of 2010, we counted 60 operating commercial mobile DTV stations broadcasting more than 80 live mobile video channels in New York; Los Angeles; Detroit; Philadelphia; Chicago; Austin, Texas; San Jose, Texas; Atlanta; Orlando, Fla.; and other major cities. Based on our research, an additional 64 commercial mobile DTV station launches were scheduled to go live by the end of 2011.

That figure could go up exponentially over the next couple years if the Mobile 500 Alliance, which covers 435 stations including those from [Fisher Communications Inc.](#) and Sinclair Broadcasting, succeeds in either merging with Dyle TV and its MetroPCS partnership or securing another major wireless carrier for distribution.

At this year's CES, the Mobile 500 Alliance did announce that it will be partnering with Elgato on the U.S. version of the EyeTV Mobile DTV Tuner for the [Apple Inc.](#) iPad and iPhone to be available for sale in the spring. From a consumer point of view, however, this is a less attractive offering than a dedicated mobile TV device: It appears to be just another phone or tablet accessory to buy and carry around.

Over the past two and a half years since the digital TV transition, stations have aggressively expanded their programming options into multiple secondary channels and now mobile channels that can be received in the home, in the car and on the move. The focus going forward will be how to develop these digital broadcast assets to increase top-line ad revenues while competing in a fragmented media landscape with competing online and mobile video options.

