

**EMBRACING DIGITAL:
A REVIEW OF PUBLIC MEDIA EFFORTS
ACROSS THE UNITED STATES**

Study conducted by Gupta Consulting, LLC
on behalf of the Corporation for Public Broadcasting

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1 Background

Media outlets as a group play a unique role in the dissemination of content within the United States. To retain this impact, they have sought to embrace new technologies to reach audiences. As NBC Universal CEO Jeffrey Zucker postulated in a recent issue of *Business Week*, “Technology has changed everything. Digital video recorders have changed the way people watch prime-time television. The Internet has changed the way people consume video. Advertising is not what it was. We’re not going to give up on the legacy businesses: news and information, the broadcast network. But if we don’t acknowledge that my 11-year-old son [is] consuming content differently, we’ll go extinct.” Nowhere is this urgency more glaring than in the realm of public media. With the burgeoning use of digital media in the private media space, and with the penetration and expansion of digital methods to accomplish this task, public media continues to look to digital options.

The purpose of this study was to scan public media across the United States with an eye toward their current digital efforts. In this document, we will first present summary data on public media digital efforts at a macro level. Quickly thereafter, we will delve into a subset of media outlets that are innovative – placing emphasis on understanding what they did, how they did it, and the results of their efforts.

We will not be able to cover each and every media outlet studied. But we have attempted to present a representative set of examples that illustrate the possibilities that, as a group, we can affect.

1.1 Rationale for the Study

The Corporation for Public Broadcasting (CPB), jointly with broadcast stations and non-station content producers and distributors (which will be collectively termed “media outlets” in this study), plays a critical role in defining the future roadmap for public media investment as a whole. In its joint role, this group is charged with looking beyond the present, to trends and realities facing public media, and to react accordingly – fundamentally, with their constituencies in mind.

What is today’s reality? Media content from a broad array of sources, especially Web-based, is usurping content offered by traditional outlets for consumer share of mind. As a result, broadcasters must seek audiences where they are; they must “fish where the fish are.”¹ The fish are using the Internet, and what they are doing is multi-fold. According to a December 2008 survey conducted by the Pew Research Center for the People & the Press, the Internet (40% of those surveyed) now surpasses newspapers (35% of those surveyed) as a source for news. For the under 30 audience, the Internet and TV as news sources are roughly equivalent. In addition, they are listening and viewing podcasts and on-demand

¹ WPBT, Miami.

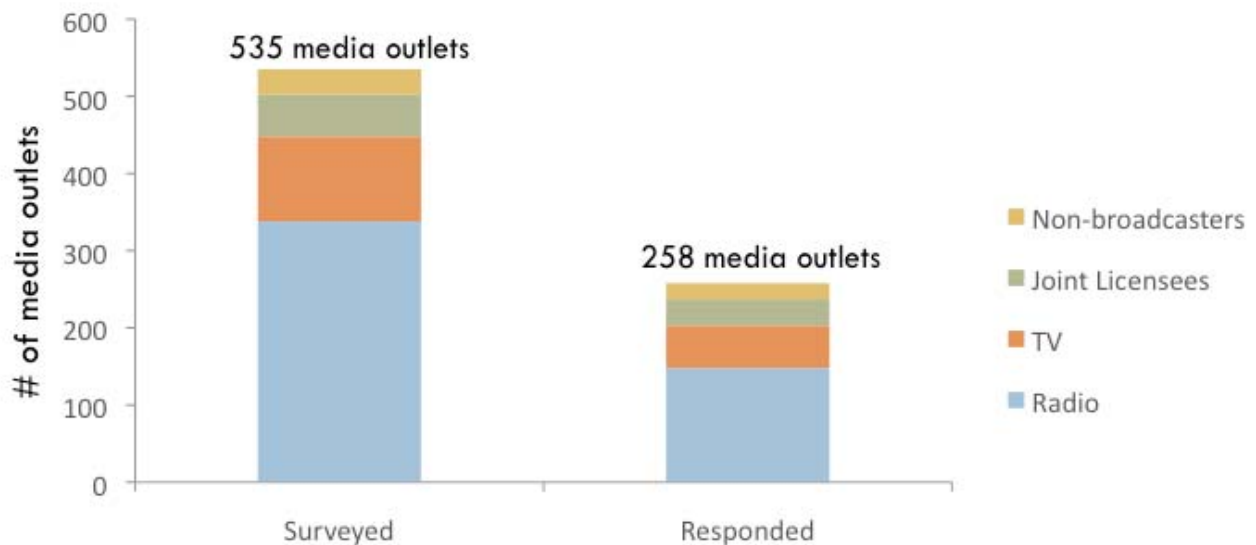
materials, they are engaging in discussions about issues, and they are creating and posting their own video and audio. People are dumping landlines for cell phones and watching movies and TV shows on their computers. Not only is much more content now available free, but advertisers are migrating online with it, supporting new media players, such as search engines and social networks.²

Public broadcasters can no longer count on traditional radio and TV to rope in younger generations who used their first computers at age 2-4 and have been coined with the term, “digital natives”, because they are part of a world saturated with web 2.0 technologies and use these technologies as their primary source of media engagement. The harsh reality is that the relevance of broadcast public media in its over-the-air format is at risk.

This study looks at how many public broadcasting stations have embraced digital media, and tries to gauge how effective they’ve been.

1.2 Survey Coverage

We surveyed 535 media outlets, nearly all CPB grantees, from which we received 258 responses. Of the 258, 55 (out of 110 surveyed) were TV stations, 148 (out of 338 surveyed) were radio stations, 34 (out of 54 surveyed) were joint licensees, and 21 (out of 33 surveyed) were non-broadcast-station program producers or distributors. The response rate was approximately 45% overall: 50% for TV, 44% radio, 63% joint licensees, and 64% non-broadcasters.

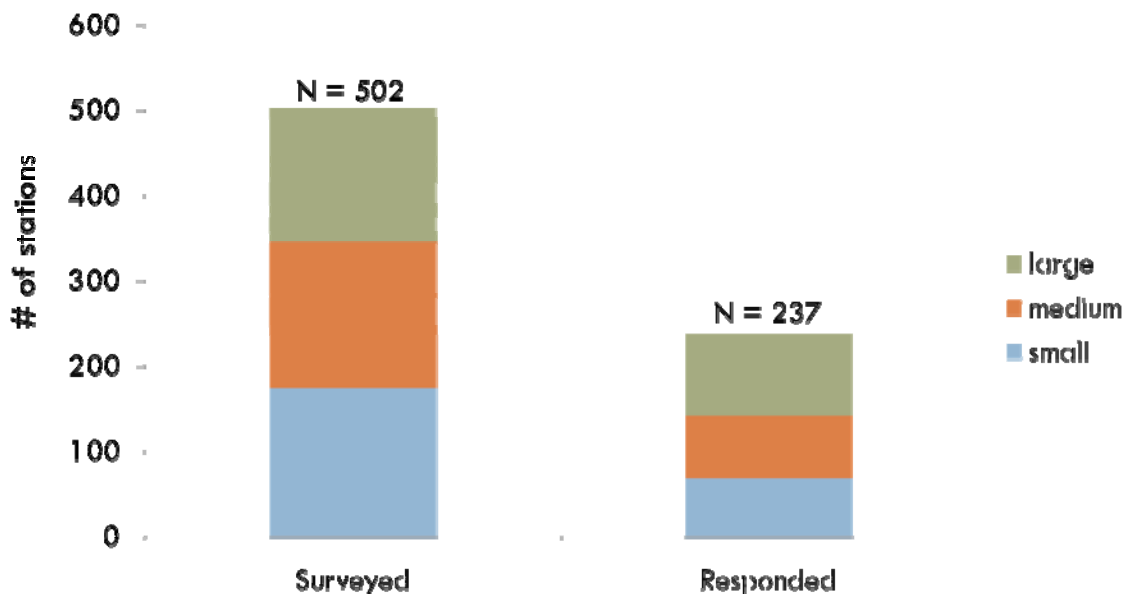


² Clark, Jessica and Patricia Aufderheide, “Public Media 2.0: Dynamic, Engaged Publics”, American University School of Communications, Center for Social Media, February 2009.

In particular, we had representation from stations of different sizes based on NFFS data:

- 68 small stations (or 39 percent of the 174 stations falling into this category)
- 73 medium stations (or 43 percent of the 171 stations falling into this category)
- 98 large stations (or 62 percent of the 159 stations falling into this category)³

The data presented in this report are not weighted to account for these disparate response rates; therefore, the responses of large-budget stations are overrepresented in any data that describe the broadcast-station community as a whole.



As one would expect, the depth and breadth of response varied dramatically from one outlet to another.

See Appendix A for a list of stations surveyed and Appendix B for a list of non-broadcasters approached.

1.3 Research Methods

We used email, Web surveying and research, and phone and in-person conversations to determine as much as we could about media outlets' goals, offerings, successes and failures.

We researched the Web sites of all stations (respondents and non-respondents to other inquiries), joint licensees and non-broadcasters,⁴ noting new digital media in set categories as specified in Section 1.5,

³ We broke the radio grantees and the TV grantees (separately) each into thirds, ranging from the third with the least NFFS (a reasonable proxy for operating budget) to the third with the greatest NFFS.

as well as digital media that fell outside the original list, such as gaming, social bookmarking, and education-related initiatives.

We then sent a series of emails targeting general managers and directors of interactive Web development with the survey attached, requesting their response. In order to increase response rate we also telephoned every station and non-distributor on the list. For some, the survey was forwarded to others in the organization for completion (financial managers, program directors, administrative support, etc.), but most respondents were station managers and heads of interactive.

When the response rate did not achieve the levels we desired, we asked CPB to send an email to all non-respondents, appealing to them for their participation. When a number of station executives said that they would prefer to fill out the survey online, it was then posted online.

We also telephoned every station and non-broadcaster on the list. We attended the Integrated Media Association (IMA) conference in Atlanta and interviewed several station executives and non-broadcasters in person. Special effort was made to interview perceived top innovators either in person or via phone.

1.4 Survey Challenges

The timing of the survey was such that it overlapped with stations' yearly membership drives. Additionally, station executives had more than one survey to fill out during the period we were collecting information for this survey, including two data-collection efforts -- the Station Activities Benchmarking Survey (SABS) and the Station Activities Survey (SAS) -- in which a station's participation is mandatory as a condition of its receiving grants from CPB.

Some station managers and Webmasters filled out the survey, but in a very cursory manner, presumably because their minds were on other surveys and issues. Thus, we received a number of incomplete or irrelevant responses that did not give us the information we sought.

We also discovered a lack of understanding of the term digital media - respondents weren't sure whether it referred to HDTV, HD Radio, the transition to digital broadcasting or "new" media.

Surprisingly, information that was not known to, maintained by, or willingly shared with us by some survey respondents included:

- Demographics of audience for digital offerings
- Audience size of digital offerings
- Usage details such as pageviews for digital offerings
- Financial information for offerings, including revenue and profit data, and
- Budget allocated to digital media.

⁴ Except for the 32 stations with no digital offerings.

1.5 Definitions

For our study, we defined digital media to include Web, RSS, blog, on-demand content, audio and video streaming, social networking, podcasts, mobile technologies, and links to third party content.

We did not include scheduled broadcast, cable or satellite television and radio long-form program distribution channels, hard media/print distribution channels, nor programs created principally for these channels.

We specifically asked about blogs, custom Web pages, e-commerce, e-newsletters, links to 3rd-party audio sites, links to 3rd-party video sites, live streaming audio, live streaming video, mobile access, on-demand audio, on-demand video, audio podcasting, video podcasting, RSS feeds, and social networking.

Other categories that were not part of our initial list, but were mentioned at times, included discussion boards, games, coloring pages, events calendars (with the ability to submit events), maps, social bookmarking, and some others more obscure.

We included only items that were part of a media outlet's ongoing day-to-day business. We looked at ongoing efforts (actual and planned), but did not include one-time deployments such as 2008 presidential race coverage or one-time polls.

The data was normalized to create common data points that could be used for comparison purposes and to provide a broad overview of the data as a whole. In some cases, the same data was normalized based on multiple criteria, to give a more detailed understanding of digital media activities.

Definitions of terms used in this study may be found in Appendix E.

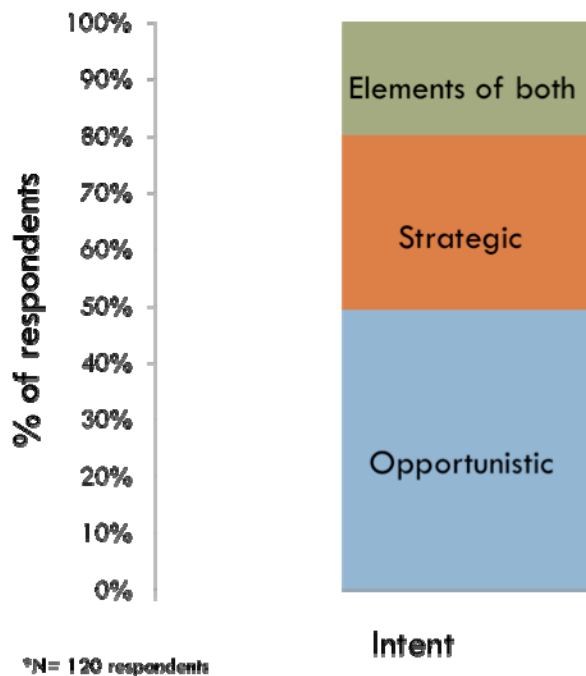
2 Executive Summary

Several learnings obtained from the study are discussed throughout this report in detail. At a high level, the most notable are as follows:

- Except for a few, stations neither have extensive digital efforts nor allocate a significant amount of their budgets to digital initiatives
- Direction and guidance in all areas of digital deployment is scarce for most stations, including business models, marketing, and strategy
- Larger media outlets are more likely to deploy digital initiatives
- Few station executives can quote quantitative measures of either goals or achievements related to their digital offerings
- A few leaders are paving the way for best practices in digital media deployment

3 Digital Strategies and Goals

The survey asked about goals for digital media offerings and whether a station had an overarching strategy or was more opportunistic in its approach to digital deployment. Respondents for half of media outlets that responded said that they do some amount of digital media planning. If we define strategy in a traditional way, including marketing, business development, revenue, metrics, and the like, we typically did not hear this level of sophistication. In some cases, a media outlet may have started with digital media deployment opportunistically, but has since added deployment of digital offerings as part of its internal strategy.



Of 120 respondents, 31% reported an overarching strategy, while 49% reported that they were opportunistic in deploying digital media. Another 20% felt they had elements of both. [Note, however, that the 120 outlets responding to this question represent fewer than half of the 258 respondents to the survey overall.]

Though many pointed to some strategic intent with their digital deployment, with some targeted goals, the method(s) to achieve them was not detailed and specific.

“We have an evolving strategy for our digital offerings. Our primary goal and concern at this point is remaining relevant as a local public broadcasting affiliate when so much of the national content can be accessed through so many other channels,” said Connecticut Public Broadcasting.

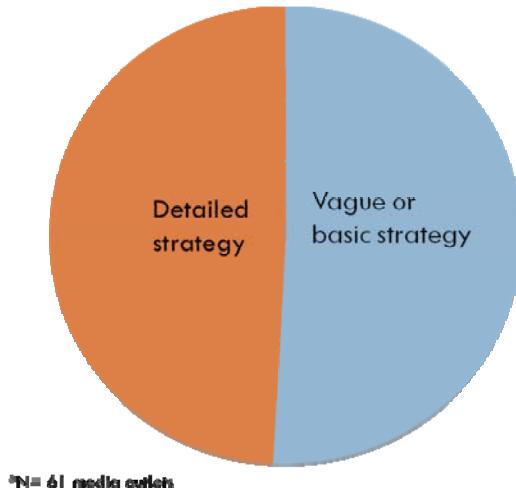
“Our goal is to reach a new audience, not a place to move content from one place to another. [We] look at a brand new mission for new platforms,” reported Jumpstart Productions, LLC [producer of *NOW on PBS*].

Some examples of stations with strategic intent include:

- **KCSM-FM & TV / San Mateo CA:** They want to fill the pipe with listeners to the Jazz station, so there is significant outreach to web listeners. They are trying to change the Bay Area’s Jazz station into Jazz for the World.
- **Georgia Public Broadcasting:** They created an organization-wide web site redesign committee with specific goals, measures and objectives. They used a mixed approach – both being opportunistic as things become available, but referencing these efforts back to their overall strategy document. Additionally, they go through an intense period of annual strategic planning, where digital goals and the highest goals (numbers of visitors, for example) are captured as well.
- **Kentucky Educational Television:** Their digital offering strategy is predicated on the theories of COPE (create once, play everywhere) and the long tail. Content is created for production of general audience TV programs and websites, as well as for learning “toolkits” (e.g. purpose-built content) for the classroom. Classroom content is delivered through a variety of platforms including: traditional TV distribution, directly via website, online learning portal KET EncycloMedia, and hybrid online/direct DVD/collateral distribution to classrooms.
- **WOJB-FM / Hayward WI:** “I believe our goal was to get our programming onto our website to increase our listenership and membership.”
- **WCLK-FM / Atlanta GA:** “100% on-demand listening and podcasting of locally produced shows. Yes, it was strategic and geared at positioning ourselves in the marketplace.”
- **Science Friday, Inc.:** “There was a strategy, [to] make science a topic of discussion around the dinner table; the goal was to get to the people by following the progression of how the Internet developed.”⁵

Fewer than half of those responding indicated they had a detailed digital strategy.

⁵ Quote, Ira Flatow.



3.1 Opportunism

59 media outlets reported that they were opportunistic in their approach to digital media. PBS reported, “The market is changing so fast, we have to be opportunistic.” KAWC-AM/Yuma AZ, said, “We essentially add things as our staff acquires new competencies.” WJFF-FM/Jeffersonville NY reported, “We’ve been adding features as we go along, based on what we think will be of interest and value to our listeners.” KEET-TV/Eureka CA said, “We just decided to try to do streaming of local programs on our website as an experiment.” And KAWC-AM/Yuma AZ said, “We have offered these services because other stations do. We did not make a strategy for these efforts.” “We like to sit back and see what is happening before we delve in” responded *CarTalk*.

We see an opportunity here for CPB to help present frameworks and devise strategies consistent with the mission of media outlets so strategic thought is layered into their day-to-day efforts.

3.2 Who Crafts Strategies

Although not part of the original set of questions, we did go back to a small sample of stations that had reported overarching strategies to ask them who crafted their strategies. The overwhelming response was that overall goals and strategies were set or approved by the board. The titles of those who crafted those strategies included:

- Head of Interactive
- Director of New Media
- Head of Web Development
- General Manager

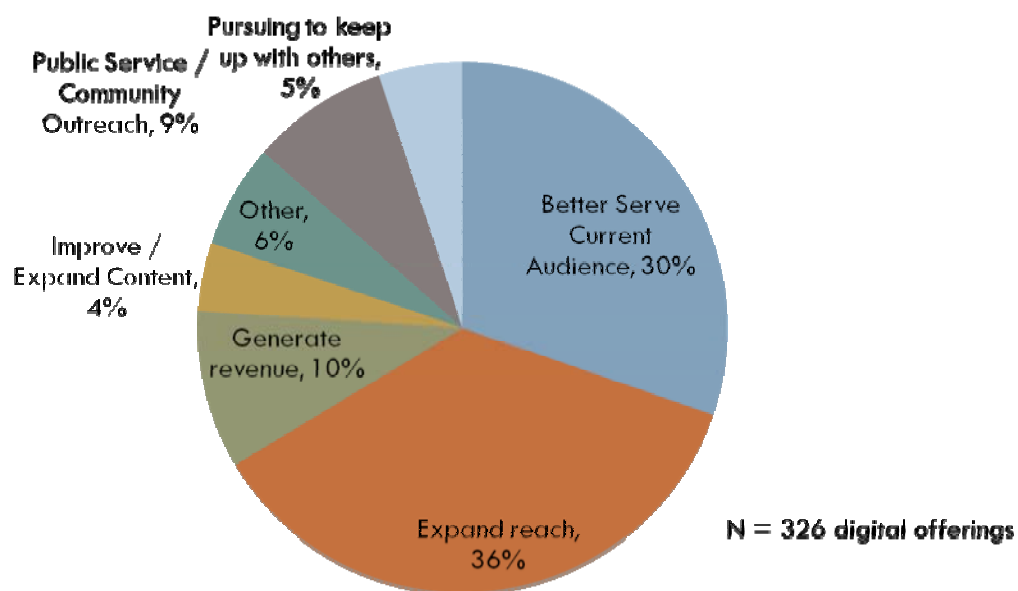
3.3 Common Characteristics

Respondents who did craft strategies shared some similar characteristics. In particular:

- Stations with digital strategies tended to be on the larger side in size (30% of the largest stations who responded had digital strategies, similarly, 30% and 24% were for middle size and least respectively)
- Non-broadcasters were slightly more likely to have digital strategies (40% had strategies of those who responded)
- They had no singular goal – goals for digital offerings varied
- They had no common amount of digital spend, though all tended to be a small percentage of overall budget
- They did not target a specific audience

3.4 Common Goals

Common goals stations stated for offering new digital media include expanding their reach (36%), better serving their current audience (30%),⁶ generating revenue (10%), offering a public service/community outreach (9%), keeping up with what other stations are doing (5%), and improving/expanding content (4%).



Not surprisingly, the majority of digital efforts were focused on expanding or migrating the demographic of their current user base or serving their current user base.

Though they may have had particular goals in mind, they did not describe methods to achieve these goals. For example, there was no mention of a marketing campaign behind expanding their reach. We sensed much more of a 'build it and they will come' attitude.

⁶ This includes the answer "time shifting."

3.5 Additional Goals

There were a number of media outlets with stated goals that did not fit any of the large aforementioned categories. These included expanding their reputation as a quality gatekeeper (KLRN-TV/San Antonio TX), getting producers and stations to program/upload (PBS and Native American Public Telecommunications (NAPT), distributing content in as many ways as possible (Public Broadcasting Atlanta), and being more cost effective (Nashville Public TV).

3.6 Target Audience

Nearly all (94%) of the media outlets did not answer the question or didn't know the answer to a question related to their target audience for a particular digital offering. Some gave broad answers, such as "Listeners looking to find a story or feature heard at some other time" (WNIJ/DeKalb IL); "People who leave Atlanta or who travel frequently" (WCLK/Atlanta GA); "Our more technically savvy audience who will want to listen on the go, or when they are out of town" (KBEM/Minneapolis MN); and "Our viewers and members" (KNME/Albuquerque NM).

Of those that responded, very few media outlets specified different target audiences for different offerings (19 total). These outlets included: Kentucky Educational TV, KLVX/Las Vegas NV, KUED-TV/Salt Lake City UT, KUEN-TV/Salt Lake City UT, Louisiana Public Broadcasting Network, Public Affairs TV (producer of *Bill Moyers' Journal*), PRI, WordWorld LLC, WBJB-FM/Lincroft NJ, WEOS-FM/Geneva NY, WFIU-FM/Bloomington IN, WGBH-FM & TV/Boston MA, WITF-FM & TV/Harrisburg PA, WMUK-FM/Kalamazoo MI, New Jersey Network, WOUB-FM & TV/Athens OH, WPTD-TV/Dayton OH, WTTW-TV/Chicago IL, and WXXI-FM & TV/Rochester NY.

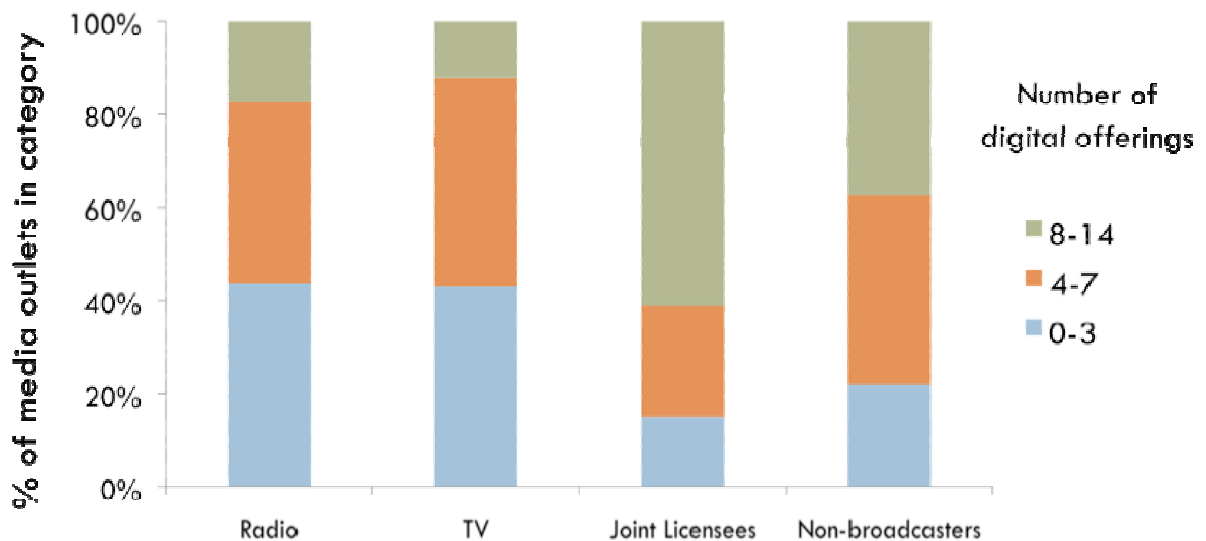
Of those who responded to this question (6%), the most prevalent answer (20%) tended toward very specific descriptions of targets such as 25-45 year olds (Louisville Public Media), 25-55 year olds (WHRO-TV & FM/Norfolk VA), the arts community and other non-profit arts groups (KSYS-TV/Medford OR) and members of the Southern Ute Indian tribe who do not live in the broadcast area (KSUT-FM/Ignacio CO). Eighteen percent (18%) responded with the answer, 'general public'. Nineteen percent (19%) responded with same as broadcast audience. A few answers garnered less than 10% of the total. These included 'expanding the audience', 'educational' and 'commuter' targets.

4 Digital offerings

4.1 Digital Presence

TV-only broadcast licensees were the slowest at rolling out digital offerings, with radio-only licensees not far ahead. Joint licensees and non-broadcasters were faster moving, and as a result had the lion's share of offerings. Typical examples based on number of offerings in each category were as follows:

- Among outlets with only 1 to 3 different kinds of digital offerings, the most common kinds of offerings were live streaming audio and on-demand audio
- Among outlets with only 4 to 7 different kinds of digital offerings, the most common kinds of offerings were live streaming audio, on-demand audio, e-newsletters, audio podcasting, events calendars, and RSS feeds
- Among outlets with 8 or more than 8 different kinds of digital offerings, the most common kinds of offerings were e-newsletters, RSS feeds, e-commerce, audio podcasting, live streaming audio, on-demand audio, blogs, social networking, on-demand video, and events calendars



N = 522 media outlets *

*excluding media outlets that did not have any core offerings, only one-off offerings. This includes: BBC/Ragdoll Ltd, KAWE-TV, KOOO-TV, KRWG-TV, WBCC-TV, WFUM-TV, WGCU-TV, WKYU-TV, WMEC-TV, WNMU-TV, WSJU-TV, WTVI-TV, WYIN-TV

4.2 Non-deployment Rationale

Anecdotally, we learned that some media outlets lacked any digital offerings or did not deploy more digital media offerings because of a lack of resources (human or financial), and the lack of revenue potential in the near- to mid-term, including online underwriting and memberships. Thirty-two media outlets had no digital presence at all.

Additionally, some media outlets took a “wait and see” approach. “We like to sit back and see what is happening before we delve in,” said *CarTalk*.

4.3 TV and Radio Barriers

When the funding and the personnel are in place, stations and non-broadcasters still encounter a number of barriers to offering digital media. For TV stations, obtaining the right to distribute online much of the video that they broadcast is a huge barrier, including an agreement with PBS not to stream video from their broadcast programming. Additionally, streaming video is expensive and requires high bandwidth.⁷ Less controversial, yet still an issue, were music rights for radio stations.

The age demographic of station personnel also seems to come into play. Some stations told us that when they hire someone younger they would delve into social networking, etc. A number of stations seem to depend on their younger staff to understand and implement digital media.

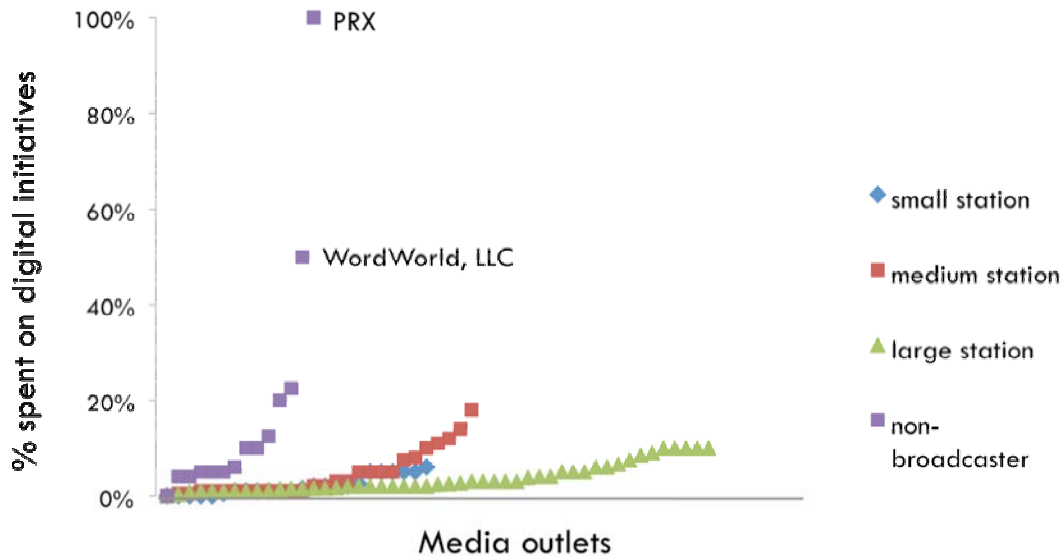
4.4 Digital Spending

The size of the station had very little impact on the amount spent on digital initiatives, barring a few outliers. Overall, radio stations spent more than TV stations, and non-broadcasters spent an average of 18% of their budget on digital initiatives.

The following chart shows the breakdown of digital spend by TV, radio and non-broadcasters (where each point represents an outlet):

⁷ Challenges to Live Video Streaming for Cisco: "One was finding the best way to deliver the video stream at the highest bit rate that each individual office could handle without overwhelming lower-bandwidth WAN links in the enterprise. This challenge was especially daunting in parts of the world where high-bandwidth connections are costly, including Europe, the Middle East, and Africa; Asia and the Pacific region; and South America. Another challenge was to automate the process of configuring thousands of Cisco routers across the enterprise for live broadcasts, a time-consuming task if performed manually. (Source: http://www.cisco.com/web/about/ciscoitwork/unified_comm/streaming_video_global_communications_web.html)

TelcoTV: VUDU Addresses Challenges to Streaming Video: "A top executive at movie streamer VUDU spent much of his TelcoTV show speech today pitching his services to telcos, but also addressed the emergence of usage caps, bandwidth metering and the likelihood of pay-extra Internet tiers. ... "It creates problems for those delivering the content," Lichty said in his presentation. He added that VUDU's rent/download-to-own movie destination only represents 10 percent of its Internet bandwidth use. That was likely in light of ongoing bandwidth metering trials by telcos and cablecos and monthly usage caps. ... "It's very expensive to deliver services," Lichty told telcos. "You have to find a way to deal with the costs. Encoding is not going to get you there." (Source: <http://www.xchangemag.com/hotnews/telcotv--vudu-addresses-challenges-to-streami.html>)



As a whole, respondents (N = 118 media outlets) spent very little on digital media, mostly less than 2%. As noted in the chart above, the size of the station had very little impact on the amount spent on digital initiatives, barring a few apparent outliers.

The majority of spending for digital media was for staff (webmaster, designers, content updaters), technology (web hosting, bandwidth, equipment, space), and content (custom web content, programming purchases). A few references were also made to marketing and fundraising, though rare.

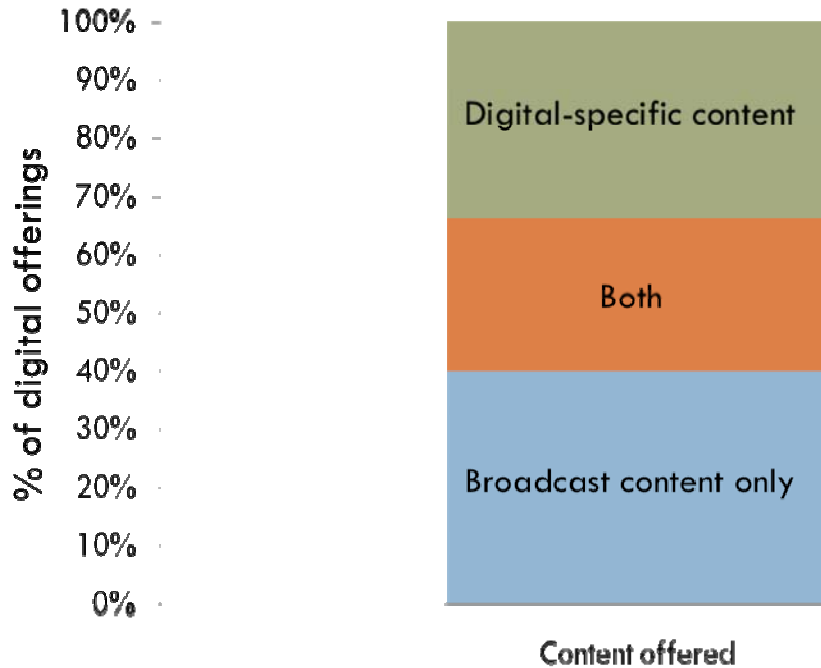
4.5 Original Content

Of the stations that responded to the survey, 44% stated that they offered some content not originally broadcast. For the remaining 56%, their online offerings consisted wholly of re-purposed broadcast content.

For those that did offer original content, some was merely in the form of outtakes or extra footage. Original offerings ranged from local news and weather to local industry and arts & culture. For example, American Documentary, Inc. provides audio and video clips such as long-form filmmaker interviews available online, of which only 2-3 minutes-long excerpts would be broadcast; Dewey, Cheetham, and Howe, producers of CarTalk, provides users with free holiday e-cards; and WKSU-FM/Kent OH provides Folk Alley extras online only.

The majority of media outlets re-purpose their broadcast content for the Web either on the whole or in part. In looking at offerings, we have included all offerings that potentially could be broadcast – including: Live audio/video, audio/video podcasts, mobile access and on-demand content. In other words, this is a summation of all offerings in those categories.

The graph below shows repurposing of over-the-air content by media outlets:



N = 829 digital offerings from 296 media outlets

4.6 Who's Doing What

Most radio stations surveyed (83%) offer live streaming audio at a minimum, and 56% offer audio on-demand. A surprising 50% offer audio podcasting.

Only 16% of TV-only stations and 24% of the joint licensees offer live streaming video, not surprising given that PBS prohibits stations from streaming the programs it distributes. In contrast, 71% offer video on-demand.

See the table below for other offerings, broken out by TV-only, radio-only, joint licensees and non-broadcasters.

Digital Distribution	Non-broadcasters	Radio	TV	Joint Licensees
Blogs	39%	24%	35%	46%
Custom Webpage	9%	2%	5%	6%
Discussion Forum	21%	5%	5%	7%
E-Commerce	73%	29%	45%	61%
E-Newsletter	79%	43%	52%	59%
Events Calendar	3%	40%	24%	61%
Link to Third-Party Audio Site	18%	9%	3%	15%
Link to Third-Party Video Site	36%	7%	28%	28%
Live Streaming Audio	21%	83%	3%	87%
Live Streaming Video	3%	2%	16%	24%
Mobile Access	15%	20%	6%	35%
On Demand Audio	58%	56%	10%	78%
On Demand Video	55%	9%	71%	72%
Podcasting: Audio	61%	50%	15%	69%
Podcasting: Video	24%	1%	24%	39%
RSS Feeds	52%	36%	42%	69%
Social Networking	61%	25%	25%	50%

N = 33 Non-broadcasters, 338 Radio, 110 TV, 54 Joint Licensees

Some observations include:

- a) Blogs, e-newsletters and RSS feeds were used to a varying degree by all outlets
- b) Custom Web pages were not a typical offering
- c) Discussion forums were more prevalent among non-broadcasters such as NPR, APM, PBS, and the like
- d) E-commerce efforts are more likely for entities where content production is the key element of their offering
- e) E-newsletters were deployed across the board by all types of media outlets
- f) Events calendars were more often deployed by broadcast stations than by non-broadcasters
- g) Links to third-party audio sites are more often for third-party content versus own content
- h) Links to third-party video sites are more often to access own content versus other's content/syndicated shows
- i) Live streaming of audio was more prevalent than live streaming of video
- j) Audio podcasting was much more prevalent than video podcasting among all media outlet types except TV-only broadcast licensees

- k) Social networking efforts in some form are taking hold and are more likely efforts for entities where content production is the key element of their offering

4.7 Interesting Innovators

The following listing includes both tools and offerings that we believe move the needle as it relates to digital innovation within public media.

4.7.1 Podcasting

4.7.1.1 WBEZ/Chicago IL

WBEZ is committed to delivering their content on platforms commonly used by members of the community. The overarching goal is to meet the public where they are (radio, web, podcast, mobile, etc.). “We're very opportunistic at the tactical level given our limited budget.”

Overall, WBEZ considers their digital offerings a success. “We have seen triple digit growth in use of on-demand and podcast and stream content.” Their live stream has 2,500 unique listeners per day; and the *This American Life* podcast is usually in the top five on iTunes, with a highly loyal audience. WBEZ total podcast subscribers range from 500,000 to 550,000.

WBEZ generates revenue in a number of ways. They report “sponsorship for our web stream is sold out for the remainder of the year.” WBEZ sells web tiles for almost every digital offering, including the e newsletter, blog, and live audio player. *This American Life* has both video (\$1.95) and audio (\$0.95) for sale on iTunes. They have subscriptions to CDs for the show.

4.7.1.2 NPR

The breadth alone of NPR’s audio podcasts is inspiring. A listener can get just about any programming produced by or offered through the NPR site including archival content. In addition, NPR offers a mix your own podcast API. A user can take current NPR podcasts and create a mix of those one would like to receive.

4.7.1.3 KCET-TV/Los Angeles CA

With the exception of *Tavis Smiley* content, KCET’s podcasting content is available only online, and they offer two distinct kinds of audio podcasts.

Podcasting at KCET began as a solution to a problem: In the beginning they couldn’t podcast their own productions because of union agreements, so KCET partnered with key local cultural institutions – to get into the podcasting “space” three-plus years ago. The first four partners were the L.A. Public Library, the Hammer Museum, an experimental theater and the Jewish cultural center. KCET’s podcasting debut was publishing these organizations’ lectures in audio form.

About two years ago, KCET introduced *Web Stories*, an online cultural “magazine” designed to reach new and younger audiences. For the magazine, KCET often partners with local community organizations or individuals. For example, for a story on affordable green architecture, KCET partnered with the *Los*

Angeles Times architecture critic. A recent story on the community of Eagle Rock was produced in partnership with students from Occidental College.

KCET reports 34,000 podcast subscribers per month, and the podcast is also available from iTunes.

KCET admits that monetizing productions hasn't been their strong point to date. Locally, KCET reports, "we've been adding more and more web original local content in efforts to increase traffic to get us to a point where we can successfully monetize.... We've added technological capability to manage ad campaigns on the site (Ad Juggler, Castfire)."

4.7.1.4 Kentucky Educational Television

KET experienced 477% growth in one year and currently has 140,000 unique users visit ket.org monthly.

In 1996, KET developed LiteracyLink, a video and online project featuring GED and workforce basic skills content. Shortly thereafter, KET began offering educational content online through its Distance Learning service. In 1999, KET began video streaming coverage of the Legislature and moved over the coming years to offer online video of all local productions. In 2006 KET launched its online podcasting service—the first of its kind among Kentucky broadcasters — that provides both audio and video subscriptions to most KET productions.

They are currently launching "Fast Forward" (<http://www.fastforwardky.com/>), an online video portal for adult basic education programs: *GED Connection*, *Workplace Essential Skills*, *Pre-GED Connection*, and *TV411*. In addition, they are launching an online video portal (in Flash format) as part of PBS's Comprehensive Online Video Ecosystem (COVE) project, as a pilot station.

4.7.2 Blogs

4.7.2.1 WYMS-FM/Milwaukee WI

WYMS provides a good example of tying broadcast, blogs, and station events together to create audience engagement. Message Board and Blog SoundBoard link to music videos on YouTube and discussion on various news videos relating to topics on Wisconsin. WYMS also provides links to various artists with complete YouTube sites. The blog targets a younger audience and links to MySpace and Pownce for social networking. Certain Blog topics are asking users opinions on issues and recording statistics. The results? Their most recent Arbitron ratings showed a 31% increase in listenership from the previous ratings period, up to a high of 32,900.

4.7.2.2 KCRW-FM/Santa Monica CA

KCRW has a goal of aggressive user engagement with respect to its blogs. The blogs provide a look behind-the-scenes on KCRW performances, the latest shows and music festivals worldwide, music insights from librarian Eric J. Lawrence and DJ Raul Campos, and a peek into audio technology from KCRW's engineers. Blogs are interspersed throughout the site as relevant to the topic at hand. Of interest, KCRW runs their commenting through IntenseDebate. IntenseDebate is known to enhance and encourage conversation on a website. In some cases, the blog content is a program description, and

people's response/comments to the program. Other blogs provide supplementary content to extend the on-air experience.

4.7.2.3 KQED-FM & TV/San Francisco CA

KQED has created community partnerships with third-party bloggers in arts, science, and food. KQED pays \$35 per post to writers to create content. Podcasts related to the arts are created by community content providers, for example: Noise Pop. With small amounts of money, KQED has created more content and a local service, and thus an affordable content production model.

4.7.2.4 WFMU/Jersey City NJ

One of the more popular blogs, attracting famous donors by using an irreverent theme and offering information about music not necessarily found elsewhere. They were an early blogger and got big traction from it. They are one of the few stations that successfully launched and still operate a blog, and use it to feed into their revenue stream (donations) as well.

4.7.3 Custom Webpage

4.7.3.1 Sesame Workshop

Parents and children alike can find value in Sesame Workshop's MyStreet custom offering. With the ability to customize a child's photo, create a playlist including videos, activities and games, parents will be able to occupy a child's interest and imagination with educational options that are self-selected.

123 beta
SESAME STREET
 GAMES VIDEOS SESAME PLAYLISTS MUPPETS MY STREET

My Street is a customizable Sesame Street web space for you and your child.
 You can save your favorite games, videos, and playlists and upload a photo to your very own Sesame Street web page.

Sign Up Now!
 Personalize your child's Sesame Street experience.
 Registration is simple and free.
SIGN UP
[Privacy Policy »](#)

Already a Member?
Log In to Sesame Street

 Your Password
 Remember me on this computer
LOG IN
[Forgot Your Password?](#)

PARENTS ON AIR ABOUT US Low Bandwidth User? [Click here](#) Search Sesame Street **GO**

sesameworkshop. See how we help children in more than 140 countries learn, grow, and reach their highest potential

Support Sesame Street

McDonald's

4.7.3.2 Nightly Business Report

Nightly Business Report (NBR) has the ability for a user to create his or her own investment portfolios and track them. This includes stocks, bonds, employee stock options and other investments. This is competitive with for-profit companies that offer this service (My Yahoo, etc.). From NBR's own research, their site visitors: consume business/financial news daily, are mostly intermediate or advanced investors, usually fall into the 46 to 65 age range, mostly have household incomes greater than \$50K, and have earned at least their undergraduate degree. For this visitor demographic, among the features they offer, 'model portfolios' rank 6th in most valuable.

The screenshot shows a financial website interface. At the top, there are navigation links: PBS HOME, PROGRAMS A-Z, TV SCHEDULES, WATCH VIDEO, SUPPORT PBS, SHOP PBS, and SEARCH PBS. Below this is a 'NIGHTLY BUSINESS REPORT 30 YEARS' banner. A 'TODAY'S MARKETS' section displays data for S&P 500, NASDAQ, and DJIA. A 'FINANCIAL TOOLS' section is active, showing a 'Portfolio Summary' for 'Julie's Portfolio'. The portfolio summary table shows a total value of \$131,454.00, a total gain/loss of -\$11,226.00, and a total change of -7.87%. Below this, there are two tables: 'Stocks' and 'Other Investments'. The 'Stocks' table lists holdings for SSO, GE, FLVX, BX, and GM. The 'Other Investments' table lists 'Janus Twenty'.

TOTAL CHANGE				
Portfolio	Value	\$ Gain/Loss	% Change Overall	Total Cost
Julie's Portfolio	\$131,454.00	-\$11,226.00	-7.87%	\$142,680.00

Stocks							
Symbol	Value	\$ Gain/Loss	% Change Overall	Last Price	Number of Shares	Purchase Price	Total Cost
SSO	\$93,432.00	-\$2,448.00	-2.55%	27.48	3400	28.2	\$95,880.00
GE	\$27,080.00	-\$2,920.00	-9.73%	13.54	2000	15	\$30,000.00
FLVX	\$9,100.00	+\$4,100.00	+82.00%	18.2000	500	10	\$5,000.00
BX	\$1,092.00	-\$708.00	-39.33%	10.92	100	18	\$1,800.00
GM	\$750.00	-\$9,250.00	-92.50%	.75	1000	10	\$10,000.00
Totals	\$131,454.00	-\$11,226.00	-7.87%				\$142,680.00

Other Investments					
Name	Value	Current Price	Quantity	Purchase Price	Original Value
Janus Twenty	\$30,000.00	30	1000	20	\$20,000.00
Totals	\$30,000.00				\$20,000.00

4.7.3.3 MyPRX

As a marketplace for producers to offer their media and stations to procure audio content, PRX has positioned their custom webpage with multiple users in mind. For producers, it is a place to upload and manage content for sale and on-going distribution, and to manage the finances associated with their transactions. For stations, it is a place to store and sample various pieces of interesting audio content, to transact, and to specify a personalized selection of content that may be of interest in the future. For individuals, it is a place to sample user-generated content that otherwise may not be accessible by any other means, mostly free of charge.

The screenshot shows the PRX website interface. At the top right, it says "JULIE GUPTA | LOG OUT | HELP". Below that is a search bar with "SEARCH" and "Go advanced" buttons. The navigation menu includes "HOME", "PIECES", "SERIES", "PLAYLISTS", "PEOPLE", and "MY PRX".

Welcome, Julie
Create a piece, view profile, or read messages.

PRX Exclusive: CBC Radio's Outfront

Image by: Benson Kua
Family, love, transcendence in small things, tragedy and laughter. The CBC series Outfront has

Upcoming (view all)

- Memorial Day - May 25th is Memorial Day.
- Mother's Day - Don't forget Mom! All kinds of pieces for Mother's Day, May 10th.
- Asian Pacific American Heritage Month - May is Asian Pacific American Heritage Month.

Featured Pieces

- Peace Talks Radio: The Peace Message in... from Good Radio Shows, Inc.
- Manufacturing Melodies from Zak Rosen
- Living With Music - Show One from WBGO

Getting Started

- Create a piece
- Take a tour
- Help
- FAQ

Inbox

- 4 Messages

My Pieces (view all)

- /pieces/31325-

My Playlists (view all)

- Julie Gupta's Favorites
- Dog stuff

4.7.4 Social Networking

4.7.4.1 American Public Media (APM)

APM, through its parent company, created a strategic alliance/became an investor in Gather. They determined it was a good fit because Gather targets the public media audience. APM wanted to take advantage of the opportunity in Gather to target the appropriate demographics and create communities around their programs. They have used social networking successfully by creating the Public Insight Journal Network, which is a network of people who have elected to participate by being expert sources about trends. That lends itself to producing content around the information received from this network.

4.7.4.2 PBS Engage suite of tools

PBS Interactive recently began development of new tools to encourage social connection at the station and producer levels as well as at pbs.org. PBS Engage has also been able to help stations and producers reach new audiences through outreach and training. Additionally, the team has hit the conference circuit to evangelize about social media in the public media sphere.

PBS Engage's suite of tools and products continues to grow. These tools, funded by the Knight Foundation, include a comments engine to facilitate gathering user-generated comments, a Flickr tool that creates photo galleries from images hosted on Flickr and a social bookmarking tool that facilitates sharing of content.

4.7.4.3 Science Friday

Unique among public media outlets is Science Friday's foray into Second Life, a virtual world populated by avatars that represent individuals. With Second Life, Science Friday is able to target a new group of

consumers in a unique setting. They have specifically targeted a property (an 'island') next to NASA in the hopes that their demographic will overlap. Science Friday has conducted interviews with interesting personalities in the virtual world and hopes to expand their offering both in scope and breadth of audience they reach. At this time, it is a money-losing proposition.



4.7.4.4 WBUR-FM/Boston MA

WBUR has converted online social networking to the real world. Online, they have multiple social networking efforts: a) link to Gathering for On Point content, b) link to MySpace and Facebook to connect to other WBUR listeners, c) link to YouTube to post videos. In addition, they created a club that meets at the station once a month. They have had four or five such events with discussions, an example being 'what newspapers are doing now'.

4.7.4.5 Generation PRX

GenerationPRX is a project of PRX to support, connect and distribute youth-produced radio. In their own words, the goals they present are as follows:

- Create an interactive network
Working with an advisory board of seasoned broadcasters and experienced youth radio producers and leaders, we've created an online space for youth radio groups to share ideas, strategies and materials.
- Develop peer feedback to help producers edit and improve work

Through the online network, trained Youth Editorial Board members and Generation PRX members provide review and feedback to their peers.

- Build a catalogue of youth-produced radio

As young producers upload their pieces, they help build an online catalogue of youth radio, the first anywhere. This storehouse provides a shared and growing body of content accessible to stations, producers and listeners through PRX. Generate new channels for youth radio distribution.

Generation PRX is advocating for greater broadcast of youth-produced radio and exploring new channels for distribution through PRX partnerships with iTunes, Audible, podcasting and internet streaming.

The social network is hosted by Ning and has many components including forums, groups, blogs, my pages and member information. A user can create his or her profile on the site. There are youth radio groups all over the United States that are members, though it does not seem to have any inherent geographic limitations.

The screenshot displays the Generation PRX Ning social network interface. At the top, the Ning logo and navigation links (Sign Up, Sign In, Search Social Network) are visible. Below the header is a banner image featuring a woman wearing headphones and a microphone, with the 'generation prx' logo overlaid. The main content area shows a user profile for Brenna Rose Bulmash, including a profile picture, name, location (Beachwood, OH, United States), and a list of latest activities. The right sidebar contains a welcome message, a sign-up link, and an 'About' section with a photo of Jones Franzel.

4.7.5 Discussion Forum

4.7.5.1 WGBH Radio and TV/Boston MA

WGBH has numerous discussion boards spanning most of its content offerings. With its *Masterpiece* and *Masterpiece Mystery* discussion boards, WGBH has created a comprehensive resource for those interested in these particular topics. A number of the boards seem to be heavily used. Overall they have

10 different boards, up to 220 threads and over 3,500 posts on one *Mystery* board, as recent as today. With *The World*, there are 14 different topical boards. Other WGBH boards vary in size and usage but as an organization, they are consistent in their offering of them.

4.7.6 Mobile Access

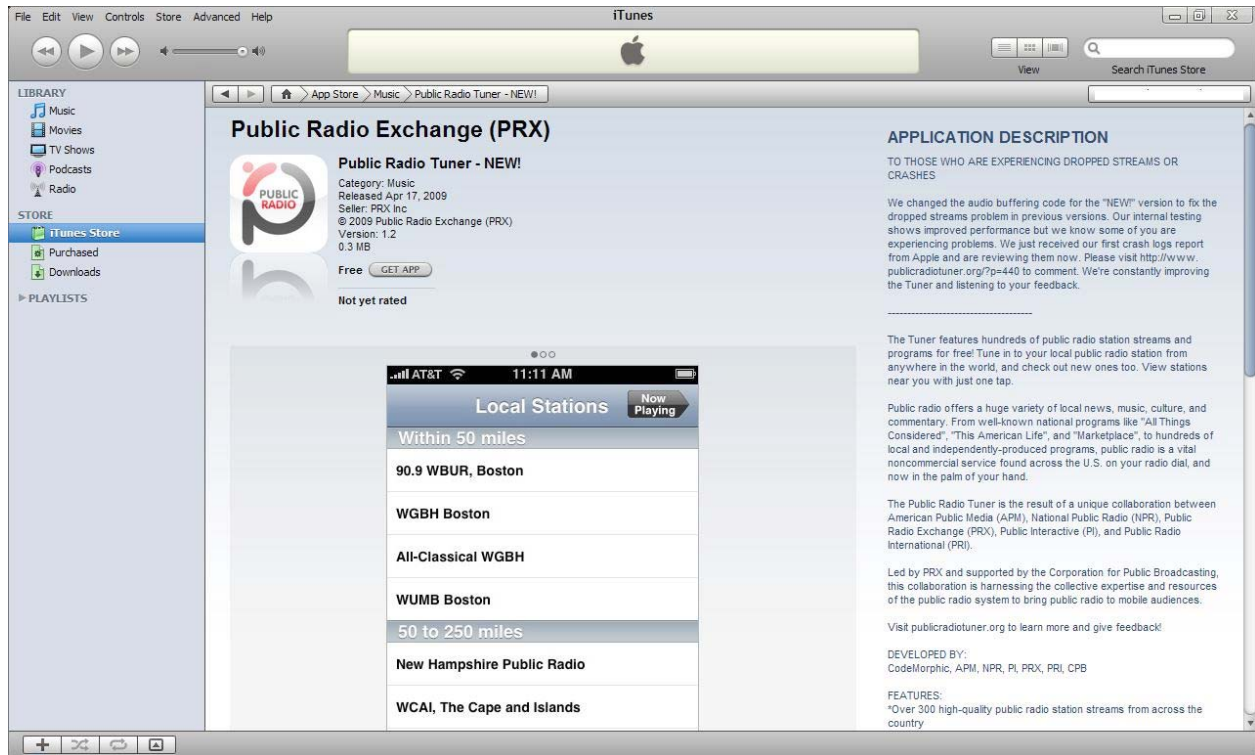
Mobile provides yet another distribution channel for audio and video content. WTTW-TV/Chicago IL stated that ‘everything they develop now is with mobile access in mind.’ A KCET-TV/Los Angeles CA user can sign up for phone alerts about shows. Iowa Public Television offers a customized schedule page of primetime programming for visitors using small (mobile) screens. Others have pursued more advanced strategies as below.

4.7.6.1 WETA-FM & TV/Washington DC

A number of stations are beginning to optimize their websites for mobile devices. By the end of the fiscal year, WETA.org will offer a mobile version of its homepage for access by cell phone users. In their words, “The site looks good on iPhones, but we’d like all mobile users to have direct and easy access to the most popular content.” In addition, WETA’s radio station is in the process of signing two agreements, one with Jacobs Media and one with American Public Media to offer an iPhone application that provides direct access to the station’s audio stream.

4.7.6.2 Public Radio Tuner

The Public Radio Tuner boasts over one and a half million user downloads in a few months, hundreds of radio stations from across the country, a program guide, and user support blog. It took a joint effort to launch the capability, but now audiences have the ability to listen to many public radio stations streamed live to their iPhone. Each station offers one stream. A very useful feature is Public Radio Tuner’s Local screen. The prompt allows the Tuner to access your current location. The application then delivers a list of public stations sorted by distance from your current location.



4.7.6.3 Minnesota Public Radio (MPR) Radio iPhone App

Unlike the Public Radio Tuner, the MPR Radio iPhone app is focused on depth versus breadth. It is focused on providing all the streams for one station. The Current, Classical MPR, MPR News, and Radio Heartland are all available to stream on your iPhone or iPod Touch when you install the free MPR Radio application from the iTunes App Store. It enjoys a minimal footprint on your device.

4.7.7 Events Calendar

4.7.7.1 WITF-FM & TV/Harrisburg PA

RSVPa is WITF's separately branded community calendar (<http://rsvpa.com>). Unlike other stations that use a standard calendar template and in some cases, are sparsely populated, WITF seems to be creating a community offering that seeks to be a one-stop shop for all goings on in a multi-county area.



4.7.8 E-commerce

Attempts to generate revenue through E-commerce were varied. Most were some type of shared revenue program, including WUWF-FM/Pensacola FL's failed wine club, KSUT-FM/Ignacio CO's travel program, many stations' Amazon referrals, ArkivMusik referrals, iTunes' referrals, WJCT-TV/Jacksonville FL's and WXXI-AM, -FM & TV/Rochester NY's online auctions, and the like. A few stood out as significant and hopefully successful efforts.

4.7.8.1 CarTalk

CarTalk's shamelesscommerce.com sells novelty items, re-packaged archive content, clothing, and puzzles. Though the site is linked at numerous places to the CarTalk.com website, it still maintains an irreverent separate brand.

4.7.8.2 The Metropolitan Opera

The Metropolitan Opera, in addition to the more typical boxed DVD sets, offers users the ability to subscribe to their performances and stream them directly from their website using the seemingly obscure Move Media Player. Subscribers may choose among a range of options: a yearly or monthly subscription with web anywhere access and unlimited plays for \$149.99 and \$14.99 respectively or rental of a particular opera for \$3.99 or \$4.99 for high-definition. For rentals, a user has 30 days to start watching or listening from the time of rental. They offer a discount for current Met members. The content is substantial: 21 HD videos, 43 historic TV performances, and 155 radio broadcasts.

4.7.9 E-newsletter

4.7.9.1 KCRW-FM/Santa Monica CA

KCRW sends out 12 topic and content-based newsletters to targeted audiences ranging from membership to programming updates to program-related. The content varies from supporting on-air

broadcasts to fulfilling membership goals to providing a little behind-the-scenes look at the station. Department heads, staff or program producers develop content.

4.7.9.2 KCET-TV/Los Angeles CA

KCET offers 10 different email newsletter choices, including general, arts, self-help, and children's programming. These are really subsets of their mailing list, which they collect for use in email blasts about particular programming.

4.7.10 Live Audio Streaming

4.7.10.1 WUWF-FM/Pensacola FL

HD had been touted as a way to offer more programming without having to secure another frequency, and an HD2 channel seemed like the means to that end. “We could carry several more programs online and on HD-2 that we didn't have slots for on our regular channel—Diane Rehm, for example. So, we felt like we'd be getting a whole other station, which in fact we did.” A \$75,000 CPB grant, money from a licensee, and cash reserves from their foundation account funded the upgrade. The total cost was around \$225,000. This high cost was necessary because our transmitter site needed substantial upgrading to accommodate the new transmitter requirement, upgrade of cooling systems, power surge protection, a second set of processors for the HD2 channel, etc. Because it added only minimal cost and because they knew HD radios were not really out there, WUWF decided to offer the HD radio station as an online station, too. “We see the offerings as an extension of our service to the community. The web is obviously the next platform people are choosing to use for information and entertainment. If we are going to stay relevant, we HAVE to start putting our programming on this platform.” The station offers XPoNential Radio,⁸ BBC, Folk Alley, Democracy Now and Diane Rehm. WUWF makes no revenue from the online station. The online station draws 1,223 users per month with an average session time of 56 minutes.

4.7.10.2 WAMU Bluegrass Country/Washington DC

WAMU-FM has a 40+-year history with bluegrass music. “Although our core mission has moved in the news/talk/information direction, we still want to serve the bluegrass audience and help preserve the history and support the future of this unique American musical genre.” At this point, Bluegrass Country is subsidized by WAMU's main operating budget. There is a discrete donor base, and a discrete underwriter client base. The goal is to expand both these revenue-generating avenues, over a three-year period, to fund 70% of the channel's operating costs. It was launched as an online service in 2001; launched as an HD channel in 2007; and added to a 250-watt local transmitter at 105.5 FM in January 2009. Underwriting is on-air and online (graphics only). Capacity exists for pre-roll; the station will also be available as a paid iPhone application soon (hopefully, by the end of March). The most recent membership campaign yielded \$39,100.50 in gifts/commitments from 424 members. The online station has around 50,000 visits a month with around 90,000 pageviews monthly. The HD/FM channel does not reach the Arbitron threshold for us to receive listener stats for on-air.

⁸ XPoNential serves up an eclectic blend of blues, rock, world, folk, and alternative country.

4.7.10.3 WYBE-TV MiND/Philadelphia PA

WYBE-MiND provides live streaming of video coupled with message boards including topics such as: Reinventing TV/ Building MiND, Ideas for MiND Programs, Producing MiND Programs, Media, Community & Learning, Global MiND, Int'l Programs & Technical Issues. MiND's schedule is primarily made up of 5-minute programs – with many of the programs being produced by community members. Every MiND program plays on-air and online for two years. MiND's 5-minute program schedule is not only seen in a mirror stream online but is also available online as on-demand content.

The MiND model is allowing for the education of the community on how to produce media with member training workshops and seminars. MiND provides many viewpoints/information in a non-traditional short amount of time with a non-traditional 5-minute program platform.⁹

4.7.10.4 PRX's Remix Radio

PRX's Remix Radio is an experimental Internet radio stream hosted by PRX to showcase pieces from PRX.org and develop new approaches to public radio formats and sounds. In their own words, 'Public Radio Exchange: Remix Radio is all about creating the best possible radio stream, so we look high and low for public radio shows that make us happy and podcasts we never dare miss. The great thing about us is that great shows don't have to be an hour long with rigid station breaks -- they can be any length, any style, and any format. Each show has a premiere date, but then that episode will show up randomly in the mix along with a few older episodes. Like HBO...We are a 24-hour semi-formatless remix of amazing public radio stories, cool podcasts, fascinating interviews, and anything else that makes a sound that we find interesting.'

From its inception, PRX has played a pioneering role in how the Internet will change the distribution of audio content. As an 'enabler', one that provides the means for distribution, PRX has created a marketplace for content that can serve both the large organization and the one-man shop. Everything that PRX does seems to be unique, from its Internet only radio programming where the user is the chooser, to its support of youth content creation through Generation PRX.

4.7.10.5 WJB-FM/Lincroft NJ – Jam Room

From their website, "Jam Room" is a collection of music from artists in the jam band sub-genre of rock which was born from bands such as Cream, Santana, and the Allman Brothers. The grandfathers of the genre are the Grateful Dead. Until their recent retirement Phish carried the torch of the jam bands after Jerry Garcia's death. The Bonnaroo Music Festival has become the Mecca of bands and fans from around the country to celebrate this style of music every year.

Some of the bands you can hear on "Jam Room" include: The Grateful Dead, Phish, Dave Matthews, The Allman Brothers Band, Cream, Santana, Jimi Hendrix, The North Mississippi All-Stars, Widespread Panic, Primus, Rusted Root, moe., String Cheese Incident, Blues Traveler, Keller Williams, Medeski Martin and Wood, Galactic,, Bela Fleck, and the Disco Biscuits.

⁹ Referenced site: <http://www.mindtv.org/styles/mind/www/about.html>

Right now the only way to hear Jam Room 24/7 is to listen online. Jam Room also has an account with Last.fm, a social networking site for music lovers. You can find it here: <http://www.last.fm/user/jamroom>

4.7.11 Live Video Streaming

4.7.11.1 Connecticut Public Broadcasting Network

The Connecticut Public Broadcasting Network offers live streaming of University of Connecticut women's basketball games. "Basketball is niche content that people are passionate about." They have 1,000 subscribers, and offer season subscriptions, monthly subscriptions or pay-per-view. AT&T underwrites the live streams.

4.7.11.2 PBS Comprehensive Online Video Ecosystem (COVE)

PBS Interactive has been working closely with 14 station pilot participants to continue moving toward the launch of customized, integrated local video portals powered by COVE. Recently, the pilot stations received access to the Video Player Admin Tool to become familiar with the process of publishing and to identify resource and workflow needs. Feedback has been positive and extremely helpful in polishing the product for launch. For example, Angie Simmons from pilot participant KCPT-TV/Kansas City MO said, "I can immediately identify 10 people at my station that can easily use this tool." Final regression testing of the video portal is currently in progress and the public launch is scheduled for April 2009. At public launch, the video portal will feature over 100 hours of full-length episodes from iconic PBS programs including *American Experience*, *American Masters*, *Antiques Roadshow*, *Frontline*, *Frontline/World*, *Great Performances*, *Nature*, *NewsHour*, *Nova* and *Nova Science Now*.

COVE has a pretty front end but behind the scenes are two elements a) asset management: "the platform" and b) a video portal living on PBS.org - a player that stations can customize and can stream full-length episodes from their sites; it's also embeddable.

4.7.11.3 KLCS-TV/Los Angeles CA

KLCS is one of the few stations using digital TV bandwidth to deliver classroom instructional live video streaming and on-demand video to teachers and students via desktop computers in the classroom. The goal is to expand to all 878 district wide K-12 schools from the current pilot of 33 schools. All funding for KLCS is provided by the General Fund of the Los Angeles Unified School District, CPB, foundation grants, and monies generated by miscellaneous other productions.

The current audience size for both digital offerings is 33 schools totaling nearly 79,000 K-12 students. The total K-12 audience is nearly 700,000 students. The original target audience was schools that did not have a television in every classroom. By targeting this audience we are trying to increase equity between schools with varied classroom resources.

4.7.12 RSS Feeds

4.7.12.1 New Hampshire Public Radio

New Hampshire Public Radio offers feeds for six different local programs, links to 15 other providers' feeds, and 17 "key word" feeds. They also provide feeds based upon the content of our stories. Each story has a "related stories" link, that, when clicked, brings the visitor to a page that shows all of the keywords related to that story, as well as the link to each keyword's RSS feed. For example, they have a John Lynch RSS feed, to keep up with the Governor.

4.7.13 Video On Demand

4.7.13.1 Iowa Public Television

Iowa Public Television has been providing on-demand video to its audience since 1997. The majority of locally produced video content is available online. Three weekly programs are available online (as full programs and as segments) the same day as broadcast. They also have an extensive presence on YouTube, garnering nearly 500,000 views in the first year since launch. In May 2007, IPTV launched an extensive redesign of its web presence, which included a substantial online video library, now featuring over 2,500 titles. Third party on demand, partnered with Mediacom Cable to make recent copies of IPTV's "Iowa Press", presidential debates, gubernatorial debates and other political programming available on Mediacom's On-Demand service. These programs are available to subscribers of Mediacom's digital cable tier. IPTV has also partnered with Mediacom Cable, the Iowa Department of Education, and Iowa's Community Colleges to make *GED Connection* available on Mediacom's On-Demand service. IPTV licenses statewide rights for this KET-produced series. Mediacom serves approximately 500 communities in Iowa. Mediacom's On-Demand service features all 39 *GED Connection* programs for use by Iowans at no viewing charge. IPTV has worked to place multiple sets of the workbooks in adult literacy centers at Iowa's fifteen community colleges in support of this effort.

4.7.13.2 PBS KIDS GO!

The PBS KIDS GO! video player continues to serve an average of over 1 million streams per week, totaling over 30 million streams since the September 2008 launch. Rockman et al, a San Francisco-based research, evaluation and consulting company, finished conducting educational impact testing on the video player. Highlights from the report include that teachers and kids found that the site is appealing, easy to use and has great educational potential. Children also reported learning about a variety of topics related to nearly every formal education subject area along with important life lessons like sharing. The majority of kids rated the PBS KIDS GO! video site as good as or better than other sites in terms of the number of videos they could watch.

4.7.13.3 WNET/New York NY

Created a content building "machine" by developing standardized formats for creating easily usable content. Set design and technical criteria and re-vamped several existing websites that had disparate formats to the same platform. Now pre-plans for all content to be web-available.

4.7.13.4 *NOW on PBS*

On demand video content offered by *NOW on PBS* includes the show itself, web exclusive videos and uncut videos. Videos on demand are the most popular pages on the site with 997,000 unique pageviews in 2008. Of particular interest is their unique interactive map of the United States where a user can go online, click on a place on the map and find on demand video of topics that relate to that region. In general, *NOW on PBS* has consistently high usage (as measured by their podcasting downloads) and with respect to usage ranks among the top half of PBS offerings and one of the top 3 public affairs shows.

4.7.14 Audio On-Demand

4.7.14.1 *Iowa Public Radio*

IPR's project discovers, shares and preserves historic audio from Iowa's past. *Iowa Archives* segments are broadcast on *Morning Edition* and *All Things Considered*, and are then posted on the *Iowa Archives* page. The archive includes sounds from the early to mid-1900s, lost home recordings, baseball memories from 1939 and many more.

4.7.14.2 *Science Friday*

Science Friday's 'Kids Connection' digital offering, co-branded with NPR, has the goal of connecting middle school students to cutting edge science. McREL (Mid-Continent Research for Education and Learning) organizes benchmarks (learning objectives) under subjects and topics. A user of this site has the ability to click on a subject or topic to find McREL benchmarks and related *Science Friday Kids'* Connection Resource Pages. Resource pages include audio and video materials, lesson plans, and links to supplemental web pages.

The *Science Friday* website also links to three-dozen science museums where they provide *Science Friday* video on museum websites (web-only content).

4.7.14.3 *Wisconsin Public Radio*

WPR is one of the few who have found a business model from their archives. Programs available for paid download; free service to paid donating members. Archive over 200 hours per month of programming and an average of 40 short news pieces per month. Regularly see over 400,000 plays per month.

4.7.15 Link to Third-Party Audio/Video Sites

The most noticeable link to third-party audio and video sites was mainly to display content on sites such as YouTube. Numerous media outlets have customized their YouTube offering for this purpose, including: NPR, WVPT-TV/Harrisonburg VA, WAER-FM/Syracuse NY, WNKU-FM/DeKalb IL, KQED-FM & TV/San Francisco CA, Iowa Public Television, etc. Their offerings mainly consist of their own content.

4.7.16 Education

4.7.16.1 *KUSC-FM/Los Angeles CA*

KUSC offers an interactive cartoon educational piece, with information about different types of classical music; interactive cartoons; and lesson plans for teachers. The central interactive piece offers audio on-demand to distinguish symphony, opera, solo voice, solo instrument, choral music and chamber music.

Another piece shows kids around the radio studio and describes the different components: board, master control room, software and input/output. The “Scheherazade Interactive” is set to the music of Rimsky-Korsakov’s symphonic suite, and also offers a lesson plan and related information. The “Brahms Interactive” is a series of musical interactives featuring the Brahms *Clarinet Trio in A minor (Opus 114)* in the city of Vienna, Austria, along with a lesson plan.

These activities are aimed at children age 4 to 9. The station’s goal is both practical and far-reaching: to assist with music education and create next generation of listeners. They partner with the Creative Kids Educational Foundation, which develops the activities. KUSC supplies the funding through grants. They average 1,700 to 1,800 hits per month on the entire Creative Kids section. However, they slightly more than doubled that in the July 2008 when there was a big push to promote the new Brahms' Vienna activity.

4.7.16.2 Kentucky Education Network

Kentucky Education Network is the state funded educational programming for K-12 and adult education, and is licensed to multiple stations. In 1996, KET developed *LiteracyLink*, a video and online project featuring GED and workforce basic skills content. Shortly thereafter, KET began offering educational content online through its Distance Learning service. In 1999, KET began video streaming coverage of the Legislature and moved over the coming years to offer online video of all local productions. In 2006 KET launched its online podcasting service—the first of its kind among Kentucky broadcasters — that provides both audio and video subscriptions to most KET productions.

Digital educational products and local content are created for Kentucky audiences and offered to Kentuckians (students and home viewers) free of charge online. Many products or services have broader reach and are marketed to out-of-state students and educational content providers. This out-of-state revenue doesn’t cover the development costs of these services, but covers on-going costs to sustain the service and provide up to 25% margins that support future development of services and operational costs. Some of these out-of-state products include: Fast Forward national sales; *Literacy Link* sales worldwide: online distance learning courses to other states; and DVD sales of local productions, childcare training accreditation content, and other educational programs.

They are currently launching *Fast Forward* (<http://www.fastforwardky.com/>), an online video portal for adult basic education programs: *GED Connection*, *Workplace Essential Skills*, *Pre-GED Connection*, and *TV411*. In addition, they are also launching high-definition DVDs in Blu-Ray format. 3. Launching an online video portal (in Flash format) as part of PBS’s COVE project, as a pilot station, in early April. 4. Exploring the feasibility of launching a public affairs blog and user commenting functions on our site within 2009.

The website receives 140K unique visitors monthly. There has been a significant change to migrate from Real Player to Windows Media (a few years ago) and from Windows Media to Flash this year. With 6000+ hours of video served, transcoding these files to new formats will be a significant endeavor, but necessary to keep services up to date with user expectations and demands. They’ve been able to make

modifications and improvements to many services – technically and content-wise – based upon the direct feedback of audience. They maintain significant databases of customers/members/users for every revenue generating digital service we offer, with information relevant to the particular offering. For free services, such as video streaming and podcasting, they do not collect personal information.

4.7.16.3 Maryland Thinkport

Maryland Thinkport provides Webtools for teachers to create a customized website for their classroom with subject-specific and grade-appropriate content. It also includes downloadable and printable sheets. In addition, they provide teacher chat site for content advice and moral support. A login is required by teachers, registration identifies grade and subject, then recommends video resources each time login. TV broadcasts, and online video clips can be downloaded as well.

Thirty percent of Maryland teachers are using it to date, and their goal is to extend the offering beyond the state of Maryland.

Funded by several partners, including PBS, Johns Hopkins University, and the National Institute for Health. Six million dollars was put into the project by funding partners. Traffic averages 120,000 pageviews per month, and 1 million pageviews per month with an average of 150,000 visits/month. They maintain active numbers through the summer, 28,000 registered users.

4.7.16.4 PBS KIDS Island

PBS and CPB announced the launch of PBS KIDS Island, the centerpiece of the new PBS KIDS Raising Readers website, which provides free reading games and activities for children, parents, caregivers and teachers to use at home or in the classroom.

PBS KIDS Island gives children the tools to build an online island by playing reading games with PBS KIDS characters from *Between The Lions*, *Sesame Street*, *Super Why* and *WordWorld*. Providing a familiar and comfortable environment for emerging readers, the research-based program guides children through seven core reading skills, from phonological awareness to letter sequencing and vocabulary. Activities are based on cutting-edge research on how children learn to read and the role of electronic media, and what works in classroom and in home settings.

The site offers a progress tracker to assist parents as they cultivate their child's learning, and enables teachers to chart progress for an entire classroom with detailed reports on each child's needs and successes. PBS is also launching a series of website modules for stations to highlight PBS KIDS Island live on their individual sites. By the end of this year, PBS will deliver modular content, including a bilingual daily reading activity calendar, a promotional interstitial module and an upcoming Word of the Day feature. PBS KIDS Raising Readers is funded by the U.S. Department of Education's (DOE) Ready To Learn grant and is a cooperative agreement of the DOE, CPB, PBS and The Ready To Learn Partnership.

4.7.16.5 Mississippi Public Broadcasting

MPB provides a thirty-day trial on a website, with password protection for teachers who are interested in using content. Downloadable teaching materials are available, in addition to tutorials on how to use

the site. They allow teachers to: create specific classes, maintain a grade book and roster, add resources, add activities and documents, build assignments & link them to a lesson plan, create completely new lesson plans, create 'quick assignments'; and create quizzes and other assessment tools. They were originally using "HotChalk" as a content provider, but have since opted to not pay the subscription fee and have developed their own streamlined content they feel is more specific to the needs of teachers.

4.7.16.6 KLVX-TV/Las Vegas NV

KLVX's "Virtual High School" hosts on demand video, acquired five media libraries for schools, and offers discounts statewide in Nevada. They have integrated other scholastic databases into a single source branded search engine. The effort is profitable and returned fully loaded cost recovery.

4.7.16.7 WITF-FM & TV/Harrisburg PA

Educational content includes the Cool School Programming and a separate site in partnership with other programs called ExplorePAHistory.com, an educational site that provides students with videos on PA history and interactive educational content associated with the videos. Resources are also available for educators.

4.7.16.8 MacNeil/Lehrer Productions

YOU.report is a 'the.News' nationwide competition that seeks to use technology - the production of video - to engage students in social studies, language arts and civic affairs. It encourages students to use multimedia skills to demonstrate knowledge from formal and informal education. 'the.News' is exclusively in an online format.

4.7.17 Failures

52 stations – about a fifth of all those responding to the survey at all -- responded to a question about at least one offering they had tried in the past that didn't work or that they later shut down. The most common reasons they gave for shutting down included lack of audience (21%), lack of funding (12%), and lack of staffing (15%).

Some interesting takeaways from asking stations about past offerings that were later shut down or considered unsuccessful included:

- Often failures are still up and running
 - Iowa Public Broadcasting - several sites created not generating significant traffic. Result of the timing of site release, lack of initial promotion, and absence of sustained content production and promotion
 - KPCC-FM/Pasadena CA - daily newsletter would be more successful but can't be limited to the station – needs to include national news
 - KWIT-FM/Sioux City IA – 2005 launch of a Spanish Web site did not yield the results hoped for, yet still running
- Election 2008 momentum waned and was not picked up by anything else

- Oregon Public Broadcasting – cameras distributed to people at polls, lots of activity, too difficult to maintain
- KNME-TV/Albuquerque NM, KSJD-FM/Cortez CO - significant rise and fall in traffic
- Blogs were often points of failure
 - PBS - struggling with blogs - has been hard to find an editorial voice for PBS Engage blog
 - WETA-FM & TV/Washington DC - the classical blog launched almost immediately, users posted more than 300 comments, many of them angry. It became very clear that the station wasn't prepared with a blog communications strategy
 - WMUK-FM/Kalamazoo MI - public forum with host blogs cancelled at request of licensee when racist groups used forums despite the station's moderating efforts. "Even though we moderated the forum, we couldn't cover it all the time."
- Inability to directly tie-in donations and other revenue-generating activities with offerings

More detailed examples include:

4.7.17.1 WUWF-FM/Milwaukee WI Wine Club

WUWF experimented with a wine club: "We were approached by a fan of the station, who also happens to sell this wine to individuals and businesses. Kind of like a 'Mary Kay' but with corks. She wanted to offer the station 20% of the sales from any wine that moved through our web site, at no cost to us, save putting up the tile at our site. Sounded good to us! She also provided wine for a nice major donor party we had (under the guise of selling some wine of course). Well, we had the tile up for about 4 months, and sold not a bottle. The stuff, after her mark up, was kind of pricey. And of course, we were prohibited from promoting her on air, which meant virtually no way for us to get the word out, except when people came across the ad on our site. As of this week, we decided that we were done with this arrangement."

4.7.17.2 Georgia Public Broadcasting's Independent Film Showcase

GPB attempted to create an Independent Film Showcase online and on-air, named "cforty7". The premise was that students could submit short films that were put online and judged. The best of these submissions would air on a late-night quarterly television program. The associated web site would also provide training materials for aspiring filmmakers.

Launched July 2006 and shut down July 2007. Early partners never actually gave money to the program. The show experienced very few viewers of quarterly program or visitors to the web site. Ultimately, 'the audience we sought didn't watch, and neither did our traditional audience.'

4.7.17.3 PRX Podcasting Subscription Application

PRX created a podcasting subscription application that was eventually displaced by iTunes. PRX reports that it was a good experiment that helped lead to other opportunities.

4.8 Other Interesting Offerings

4.8.1 KQED-FM & TV/San Francisco CA's QUEST

One of KQED's strengths is that it uses the web as a third media platform, not just a promotional site for its TV or radio broadcasts. One of its major online offerings is QUEST, identified as "a KQED multimedia series exploring Northern California science, environment and nature." QUEST has an emphasis on hard science.

The site includes video and audio on-demand; a blog; interactive "explorations" with maps, photos and text; and educators' guides with standards-based resources. Most of the audio/video downloads were originally broadcast, but occasionally originals are offered, too.

QUEST offers its videos in an easy-to-embed format and sends them out via an almost viral marketing campaign to science and technology Web sites. In the first six months of season one, 500,000 people downloaded programs. QUEST videos average 62,800 pageviews per month, and video downloads average 77,000 per month. Via NPR podcasting, QUEST averages 3,372 downloads per month. Through YouTube, QUEST averages video views of 21,000/month.

QUEST's web audience grew from 18% of its total audience in Season 1 to 33% of its total audience in Season 2. Downloads of QUEST's lesson plans increased 90% after they began a partnership with iTunesU.

The station offers trainings for teachers on how to use QUEST in their classrooms.

KQED received \$7.7 million from the National Science Foundation, Gordon and Betty Moore Foundation and other donors for the local production of QUEST. KQED plans to experiment with online donations around QUEST imbedded videos to see if they can bring in revenue from these.

4.8.2 WBEZ-FM/Chicago IL's Vocalo

Vocalo was developed from a strategic intent to expand audience beyond the "typical" public radio audience. To create Vocalo, WBEZ split off one of their repeaters just southeast of Chicago by Lake Michigan to a target an audience formerly unreachable by WBEZ.

Built on community radio sensibilities but without the characteristic schedule of special-interest shows; Vocalo has no shows at all. It airs a continuous, seamless talk-based stream completely devoted to Northwest Indiana and Chicago metropolitan area culture, issues and selected music. It is not a news station. There are no newscasts. 'We never refer to it as public radio or give it the typical trappings, such as pledge drives.' Vocalo is a partially user-created station and webcast of audio, video and images. It also includes a shoutbox (chat) component.

4.8.3 WPBT-TV/Miami FL's UVU

WPBT's UVU is a user-created video-sharing site. It is quite successful in terms of growth. Offline, it has raised the station's profile, and has more tightly connected it with organizations on various projects. Relationship building and exposure to a significantly younger audience is a big success. In addition, the

UVU newsletter has a faithful set of 4,000 subscribers with a 20-25% click-through rate; it's a digest of three featured videos.

4.8.4 KCRW-FM/Santa Monica CA Mobile Reporting

KCRW is hiring on-the-street reporters to use mobile devices (Nokia cell phone video cameras) to generate original interview and video content to post online. So far, KCRW has covered a number of events: the Democratic and Republican conventions, the inauguration and two different music festivals. Their convention coverage was featured in the New York Times. In the near future this service will be expanded to encourage listeners to submit content on a public channel. Content is online only, but is promoted on-air.

4.8.5 American Public Media (APM)'s Widgets

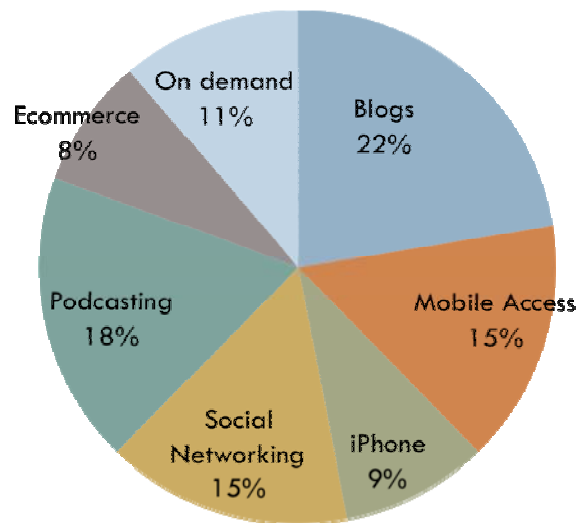
APM has proliferated the use of small deployable programs, or "widgets" they collectively refer to as a "Toolbox," which allows them to illustrate online some of the concepts covered in their radio stories. A good example of this is the Marketplace Blackboard, used to demonstrate financial models or other detailed business-related explanations. They have made it easy for anyone to embed content on their website, and it's free to users.

4.8.6 This I Believe

Three-minute essays, some of which were broadcast on NPR and now may be used in conjunction with the Bob Edwards show, used 100% user-generated content; 97% came to them via online.

4.9 Future Plans

Of those who reported future plans 154 said they would be creating additional offerings or adding to what was already in place. Only 8% said they would be trying to generate more revenue through their digital offerings. 22% said they would be adding blogs (recall that blogs also were mentioned most often as a point of failure), 18% plan to add podcasting, and 15% each plan to add social networking or mobile access.



N=98 media outlets; iPhone is also mobile access but was specifically called out by some in survey responses

4.10 What They Didn't (or Couldn't) Tell Us

Basic survey data that could not be obtained from stations mainly concerned audience statistics and financial data:

- Less than half of the respondents knew their broadcast demographics, and very few had any sense of their digital demographics.
- A number of stations couldn't tell us how large their digital audiences were. Many stations couldn't tell us the demographics of their digital audiences. Very few admitted not knowing, but did say they just don't have a way to measure this.
- Many didn't know how much their station spent on digital media. Typically, they don't break that out of their regular budget. Of those who gave figures for this question, many were merely guessing.
- Many couldn't provide financial information for offerings, including revenue and profit data.
- Surprisingly, many stations could not or would not give a clear answer about why they launched particular digital offerings.
- We were also surprised to find out that many stations did not break out their online underwriting; they offered it as a package with broadcast underwriting. Given that many stations don't know their digital audience sizes, however, it might be difficult for them to persuade underwriters to contribute to digital offerings separately.

4.11 Demographics and Growth of Digital Audience

Although a number of stations are deploying or have already deployed Google analytics, very few stations were able to supply us with specific demographics of their digital audiences, and most of these could only supply data for pageviews or unique users.

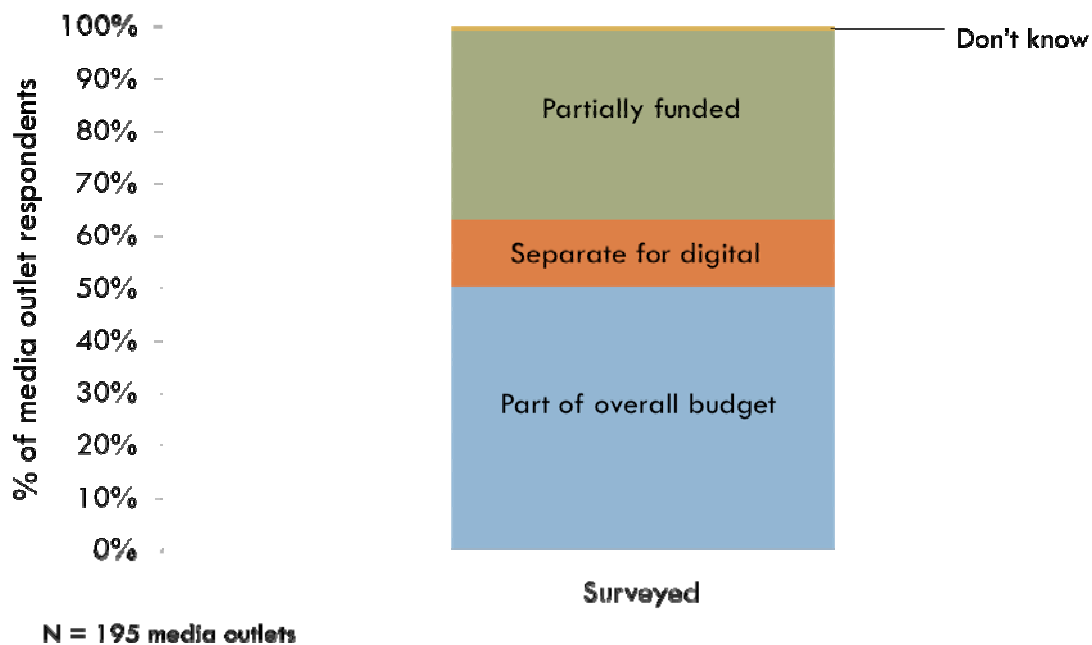
Many stations thought that their demographic for digital media was younger, but this was not based on numbers or any other concrete evidence.

Since many stations reported that they had no way to measure their audiences, or they did not respond to the question, they also could not measure their audiences' growth. Of those who did respond, many answered broadly: "some growth," "a lot of growth," and so forth.

4.12 Revenues

For 50% of those who responded to the question, "How did you fund your digital initiatives?", they did not separate their digital business (revenue and costs) from their broadcast budget. The remainder either had separately funded their digital efforts in whole (14%) or in part (34%). One percent did not know. Fifteen percent of survey respondents did not answer this question.

Out of the 110 (21%) media outlets that categorized their digital sources of revenue, they responded with answers which included underwriting, online pledging, advertising, e commerce, and a medley of these.



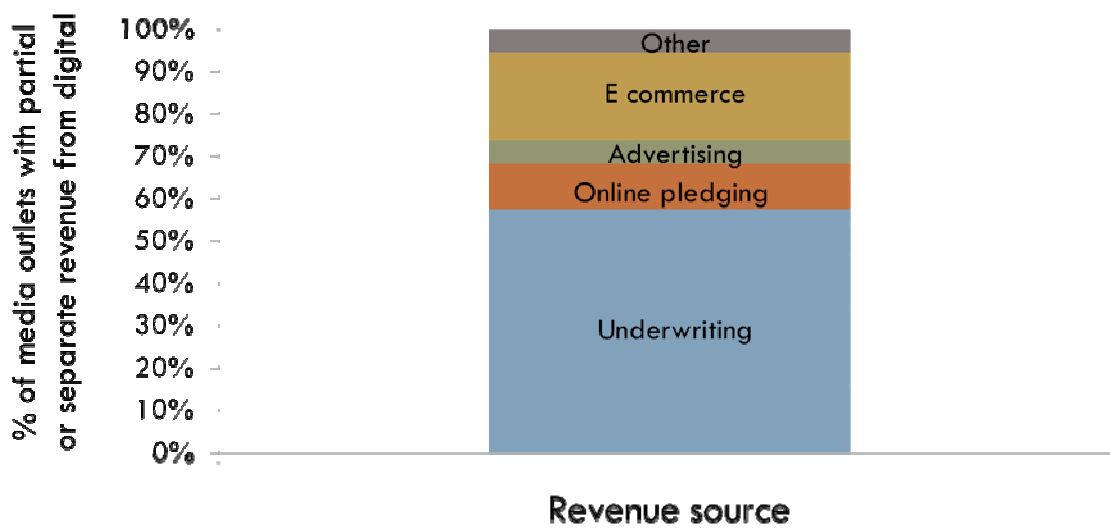
Anecdotally, a number of stations said that they did not separate out online underwriting from broadcast underwriting. Six stations offered online underwriting separately. These included American

Public Media, KAWC-AM/Yuma AZ, Maryland Network, WHRO-TV & WHRV-FM/Norfolk VA, WPSU-FM & WPSU-TV/University Park PA and WYPR-FM/Baltimore MD.

E-commerce included: pay for use – prevalent in podcasting, etc., advertising, product sales – downloads of programs, online auctions, online donation tools, and links to shopping sites – Amazon.

Specific sources of revenue, with examples, include:

- *CPB grants* – Maryland Network
- *State grants* – Georgia Public Broadcasting
- *Fee for service* – KCET-TV/Los Angeles CA; web production revenues
- *Subscriptions to live streaming* – The Metropolitan Opera
- *Online pledging* – WMUK-FM/Kalamazoo MI; find they are expanding to “global” audiences and even receiving donations from abroad
- *Underwriting* – WBUR-FM/Boston MA; overall raised \$250K per year underwriting associated with online
- *NPR podcast share* – WBUR-FM/Boston MA; raised \$50-\$70K per year from podcasting revenue; not sure if they can keep it up
- *E commerce* – WKYU-FM & TV/Bowling Green KY, WXXI-AM-FM-TV/Rochester NY; online mall with name brand stores, eBay, etc.; third party auctions
- *Banner ads* – WGBH Radio & TV/ Boston MA; classical gateway sponsors
- *Pre-roll ads* – *Car Talk*
- *Sponsored newsletters* – Connecticut Public Broadcasting
- *Google AdSense* – WKAR-AM-FM-TV/East Lansing MI; successfully placed a number of targeted GoogleAds to help reach out to specific audiences and drive new visitors to specific sections of website (and station services)



N=110 media outlets

156 respondents (23%) reported digital offerings identified as commercial endeavors, with 167 commercial offerings in all being reported. Respondents reported 231 revenue-generating offerings in all. Commercial here means with the intent of making money, which includes shops selling logo items,

Amazon links and search boxes, GoodSearch links and partnerships with business where the station/producer gets a cut of business. Only 22 identified revenue partners, including Amazon, ArkivMusic, and iTunes.

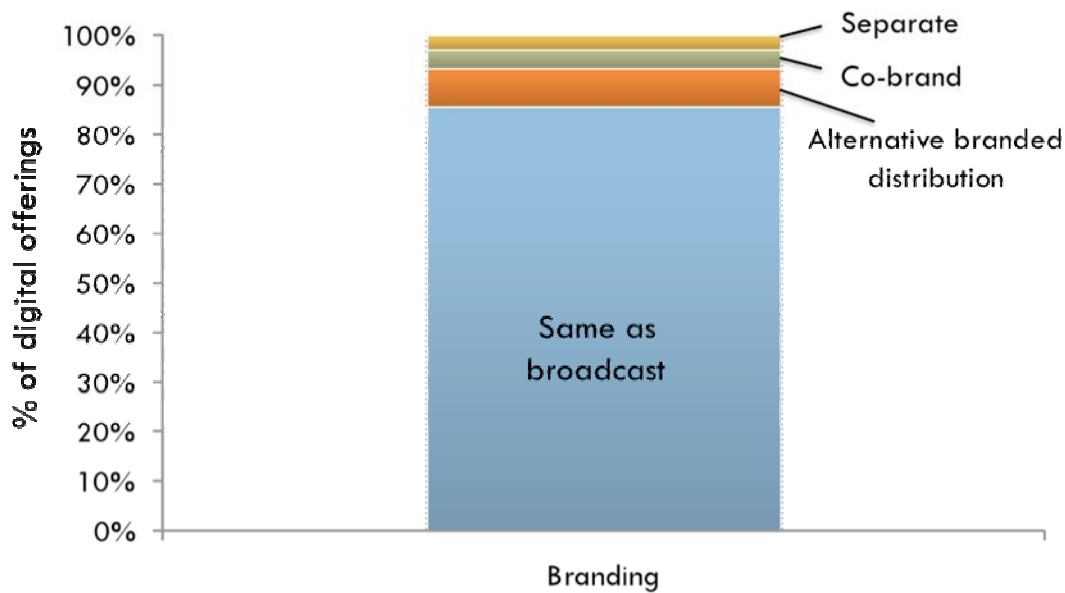
A good example of online success? KVOD/Colorado Public Radio said approximately 25% of member pledges are from online.

A few stations offered their thoughts on the revenue potential of digital:

- “There is no business model for digital offerings at this point. It’s all offered as value added, or ancillary programming connections to the Main Channel offerings. They (digital media) are becoming more important as time progresses... and as we learn to merge the financial aspects of underwriting and Corporate sponsorship with digital media.”
- “Our digital services are not and likely never will be profitable via any easily identifiable revenue stream. But the digital offerings are at the core of the relationship building effort with our existing core giving community. We see the online effort as an alternative delivery mechanism for our public service mission.”

4.12.1 Branding

Over eighty-percent use the same branding online as with broadcast. However, there is a small group that has separate digital branding. This group includes: KQED’s QUEST, PBSengage, V-me, Vocalo, Organissimo, Florida Quest, The Polar Producers, Linea Abierta, gather.com and shamelesscommerce.com. In addition, a small percentage partnered with others for their branding. Partnerships included the Kentucky Board of Education, Travelocity, and *Wired Magazine*.



N = 3,076 digital offerings, alternative branded distribution includes YouTube, Facebook and the like

4.13 Capturing User Data

Of the eighty-nine stations that responded and said they captured some user data, 58% captured only email information while the remainder collected other personal user information in addition. Not one said they did anything with the collected data beyond its original purpose (e.g., email newsletter).

One of the best practices that emerged from the survey in this area came from WGBH, who entices people to sign up for its email newsletter by giving away books and DVDs.

5 Defining and Measuring Success

5.1 Pageviews

Very few stations define success with concrete metrics. Most examples are anecdotal (“I just have a sense”). What they consider to be ‘successful’ is very subjective. Those that do have an idea of what success means to them, include metrics such as: pageviews, unique users, and calls into station when online offerings fail to work.

Very few stations define success with concrete metrics. They are very vague. Representative comments include:

- “We are not currently measuring overall success (i.e., profitability). As far as increase in listeners using digital offerings, we consider our offerings a great success and integral to our overall service.”
- “Success? I think it’s useful and important to do this. How do you measure success? In general: Over 15% of our fundraising goal now comes in through our website.”
- “No, we don't make any money from the online stream. In fact, it costs the radio station to have it. None of digital offerings are profitable so far and we don’t anticipate that they will be profitable. In our estimation these offerings are going well. We measure success from feedback that we get from online visitors who E-mail and from those in the local community who visit the radio station online.”

5.2 Unique Users

A fair number of stations and non-broadcasters also provided overall numbers of unique digital users. See the table below for monthly unique users for those who reported.¹⁰

¹⁰ 83 stations out of 258 stations who responded cited overall unique user figures

TV # Unique Users/month	Percent Reporting
<1000	0%
1001 - 10,000	8%
10,001 - 100,000	58%
100,001 - 200,000	17%
200,001 - 300,000	8%
300,001 - 400,000	0%
400,001+	8%
Radio # Unique Users/month	Percent Reporting
<1000	5%
1001 - 10,000	24%
10,001 - 100,000	55%
100,001 - 200,000	8%
200,001 - 300,000	0%
300,001 - 400,000	0%
400,001+	8%
Joint Licensees # Unique Users/month	Percent Reporting
<1000	6%
1001 - 10,000	0%
10,001 - 100,000	59%
100,001 - 200,000	24%
200,001 - 300,000	6%
300,001 - 400,000	0%
400,001+	6%
Non-broadcasters # Unique Users/month	Percent Reporting
<1000	0%
1001 - 10,000	0%
10,001 - 100,000	38%
100,001 - 200,000	6%
200,001 - 300,000	6%
300,001 - 400,000	0%
400,001+	50%

5.3 Downloads

TV stations could not provide metrics for video downloads, but many said with the new PBS COVE player, they would be able to provide numbers in the future.

5.4 Subscribers

For e-newsletters 9% of stations that had these provided numbers. Subscriber numbers ranged from 500 to 110,000. Many stations offered more than one newsletter, catering to targeted audiences.

5.5 Digital Users as Donors

Although this question was not included on the original survey, we went back to a small number of stations to ask them if their digital media users were also donors to the organization. Only KQED-FM-TV/San Francisco CA was able to come back with some kind of answer to this question: “Nielsen survey data shows high correlation users and donors.” Unfortunately, the KQED Nielsen data reports only “ever gave” donors, and there may be so many donors or ex-donors among the kqed.com users just because almost all the users are also longtime members of the broadcast audiences (and maybe even heavy users of the broadcast services, at that). Other stations did not track this link.

6 Conclusions and Suggestions

6.1 Media Outlets’ Needs

CPB opportunities identified anecdotally throughout the course of the study include:

- Stations need guidance and information on “best practices” related to offerings
- There is a need for standardization for the production/development of new media
- There is a real need for stations to understand metrics, what data to collect, and how to use information to their advantage
- Education is needed on options for generating revenue to support digital offerings; these models exist, they need to be gathered and disseminated
- Stations would like to see the results of this study to get a better picture of what’s working and what pitfalls should be avoided

Some specific examples include the following:

6.1.1 Centralized services

A number of stations pointed to PBS COVE as an example of a useful centralized service. “We hope to incorporate the PBS COVE initiative and have a more comprehensive and usable video delivery system”, said WEDU-TV/Tampa FL.

News and information service is a real potential no one has cracked according to Tim Olson, KQED. He says, “It can’t happen with one organization, given the structure of the system. Instead of the major league baseball model, let’s figure out a few specific audience services in digital media and get smaller coalitions tied with business model working on it. For example, we could create a news and information service. Get NPR, [the John S. and James L.] Knight [Foundation] and so forth together and create a network of 20 third-party blogging reporters.”

From Dan Gediman, *This I Believe*, “[The] #1 thing that would be helpful - a spin-off of NPR that would sell underwriting for public TV and radio; [it would] fill unused time at stations – stations have a hard time selling all their underwriting. NPR tried with alt.NPR but it didn’t work; perhaps create a consortium.”

Jayne Swain from PBS observed, “People are clamoring for tools” that are free, easy to implement; also people for reference to talk to about strategy.

6.1.2 Portability

According to KRFC-FM/Fort Collins CO, “The new ‘Public Radio Tuner’ and iPhone are setting the benchmark [for all others] to reach. I truly think portable media devices will dominate, users will acquire all forms of music, video and text on ‘smartphones’ etc. The model is brilliant, users want the gadget, and they’ll want all their media available on that gadget. CD’s are dead, newspaper’s death rattle can be heard faintly, Cable TV will die unless they get better content – most young people prefer movies online, or with Netflix, and reading newspapers online. They listen to ‘Pandora’ on the web or some other streamed Internet station, or their ‘pod’. A wireless device is all that’s needed.”

Other comments on portability include:

“Would like to have public media metadata accessible (like NPR's API format) where all content can be shared and accessed.”

“Would like to see standards set for digital production to make passing and sharing content more efficient.”

6.1.3 Guidance

Stations often suggested the need for guidance and standardization in the technical development, sharing, and maintenance of digital media. They thought of this as a role CPB could or should play.

Some comments included:

“I wish CPB would adopt a ‘venture capital’ model for funding digital media. I wish you would choose stations that have good management in place and strong executive-level backing and give them the resources to hire staff and pursue the projects that hold the most promise.”

WNET-TV/New York NY recommended that CPB “help to structure standards for Web development for on demand video to increase ease of sharing content among producers and stations.”

7 Appendix A: Stations Included in Survey

Media Outlet Name	Media Outlet City	Media Outlet State
KNBA-FM	Anchorage	AK
KSKA-FM & KAKM-TV	Anchorage	AK
KAKM-TV	Anchorage	AK
KBRW-AM	Barrow	AK
KYUK-AM	Bethel	AK
KCUK-FM	Chevak	AK
KDLG-AM	Dillingham	AK
KUAC-FM & KUAC-TV	Fairbanks	AK
KZPA-AM	Ft. Yukon	AK
KIYU-AM	Galena	AK
KHNS-FM	Haines	AK
KBBI-AM	Homer	AK
KCAW-FM	Juneau	AK
KTOO-FM & KTOO-TV	Juneau	AK
KRBD-FM	Ketchikan	AK
KMXT-FM	Kodiak	AK
KOTZ-AM	Kotzebue	AK
KSKO-AM	McGrath	AK
KFSK-FM	Petersburg	AK
KSDP-AM	Sand Point	AK
KUHB-FM	St. Paul Island	AK
KTNA-FM	Talkeetna	AK
KNSA-AM	Unalakleet	AK
KIAL-AM	Unalaska	AK
KCHU-AM	Valdez	AK
KSTK-FM	Wrangell	AK
WBHM-FM	Birmingham	AL
Alabama Public Television	Birmingham	AL
WLRH-FM	Huntsville	AL
WLJS-FM	Jacksonville	AL
WHIL-FM	Mobile	AL

Media Outlet Name	Media Outlet City	Media Outlet State
WVAS-FM	Montgomery	AL
WJAB-FM	Normal	AL
WTSU-FM	Troy	AL
WUAL-FM	Tuscaloosa	AL
Arkansas Educational Television Network	Conway	AR
KUAF-FM	Fayetteville	AR
KABF-FM	Little Rock	AR
KUAR-FM	Little Rock	AR
KASU-FM	State University	AR
KVZK-TV	Pago Pago	AS
KNAU-FM	Flagstaff	AZ
KUYI-FM	Kykotsmovi	AZ
KOHN-FM	Sells	AZ
KBAQ-FM	Tempe	AZ
KJZZ-FM	Tempe	AZ
KAET-TV	Tempe	AZ
KGHR-FM	Tuba City	AZ
KUAZ-FM	Tucson	AZ
KXCI-FM	Tucson	AZ
KUAT-TV	Tucson	AZ
KNNB-FM	Whiteriver	AZ
KAWC-AM	Yuma	AZ
KHSU-FM	Arcata	CA
KPFA-FM	Berkeley	CA
KPFK-FM	Berkeley	CA
WPFW-FM	Berkeley	CA
KCHO-FM	Chico	CA
KZFR-FM	Chico	CA
KEET-TV	Eureka	CA
KSJV-FM	Fresno	CA
KVPR-FM	Fresno	CA
KVPT-TV	Fresno	CA
KIDE-FM	Hoopa	CA
KOCE-TV	Huntington Beach	CA
KUFW-FM	Keene	CA
KKJZ-FM	Long Beach	CA
KUSC-FM	Los Angeles	CA
KLCS-TV	Los Angeles	CA

Media Outlet Name	Media Outlet City	Media Outlet State
KCET-TV	Los Angeles	CA
KVMR-FM	Nevada City	CA
KAZU-FM	Pacific Grove	CA
KPCC-FM	Pasadena	CA
KZXY-FM	Philo	CA
KWMR-FM	Point Reyes Station	CA
KIXE-TV	Redding	CA
KMUD-FM	Redway	CA
KRCB-FM & KRCB-TV	Rohnert Park	CA
KXJZ-FM & KXPR-FM	Sacramento	CA
KVIE-TV	Sacramento	CA
KVCR-FM	San Bernadino	CA
KVCR-TV	San Bernadino	CA
KSDS-FM	San Diego	CA
KPBS-FM & KPBS-TV	San Diego	CA
KALW-FM	San Francisco	CA
KQED-FM & KQED-TV	San Francisco	CA
KCBX-FM	San Luis Obispo	CA
KCSM-FM & KCSM-TV	San Mateo	CA
KUSP-FM	Santa Cruz	CA
KCRW-FM	Santa Monica	CA
KBBF-FM	Santa Rosa	CA
KCLU-FM	Thousand Oaks	CA
KRZA-FM	Alamosa	CO
KAJX-FM	Aspen	CO
KGNU-FM	Boulder	CO
KDNK-FM	Carbondale	CO
KVOD-FM	Centennial	CO
KRCC-FM	Colorado Springs	CO
KBUT-FM	Crested Butte	CO
KUVO-FM	Denver	CO
KBDI-TV	Denver	CO
KRMA-TV	Denver	CO
KDUR-FM	Durango	CO
KRFC-FM	Fort Collins	CO

Media Outlet Name	Media Outlet City	Media Outlet State
KAFM-FM	Grand Junction	CO
KUNC-FM	Greeley	CO
KSUT-FM	Ignacio	CO
KSJD-FM	Mancos	CO
KVNF-FM	Paonia	CO
KOTO-FM	Telluride	CO
WSHU-FM	Fairfield	CT
Connecticut Public Broadcasting Network	Hartford	CT
WMNR-FM	Monroe	CT
WHUS-FM	Storrs	CT
WAMU-FM	Washington	DC
WHUT-TV	Washington	DC
WBCC-TV	Cocoa	FL
WDSC-TV	Daytona Beach	FL
WQCS-FM	Fort Pierce	FL
WGCU-FM	Ft. Meyers	FL
WGCU-TV	Ft. Meyers	FL
WUFT-FM	Gainesville	FL
WUFT-TV	Gainesville	FL
WJCT-FM	Jacksonville	FL
WJCT-TV	Jacksonville	FL
WFIT-FM	Melbourne	FL
WDNA-FM	Miami	FL
WLRN-FM & WLRN-TV	Miami	FL
WPBT-TV	Miami	FL
WUCF-FM	Orlando	FL
WMFE-FM & WMFE-TV	Orlando	FL
WKGC-FM	Panama City	FL
WUWF-TV & WUWF-FM	Pensacola	FL
WSRE-TV	Pensacola	FL
WFSU-FM	Tallahassee	FL
WFSU-TV	Tallahassee	FL
WMNF-FM	Tampa	FL
WUSF-FM & WUSF-TV	Tampa	FL

Media Outlet Name	Media Outlet City	Media Outlet State
WEDU-TV	Tampa	FL
WXEL-FM & WXEL-TV	West Palm Beach	FL
WCLK-FM	Atlanta	GA
WSVH-FM	Atlanta	GA
WRFG-FM	Atlanta	GA
WUGA-FM	Atlanta	GA
Georgia Public Broadcasting	Atlanta	GA
Public Broadcasting Atlanta (WPBA-TV & WABE-FM)	Atlanta	GA
WBCX-FM	Gainesville	GA
KGTF-TV	Barrigada	GU
KPRG-FM	Mangilia	GU
KKCR-FM	Hanalei	HI
KHPR-FM	Honolulu	HI
Hawaii Public Television	Honolulu	HI
Iowa Public Radio	Ames	IA
KCCK-FM	Cedar Rapids	IA
KIWR-FM	Council Bluffs	IA
Iowa Public Television	Johnston	IA
KWIT-FM	Sioux City	IA
KBBG-FM	Waterloo	IA
KBSU-FM	Boise	ID
KBSW-FM	Boise	ID
KAID-TV	Boise	ID
WSIU-FM	Carbondale	IL
WSIU-TV	Carbondale	IL
WEFT-FM	Champaign	IL
WEIU-TV	Charleston	IL
WRTE-FM	Chicago	IL
WBEZ-FM	Chicago	IL
WTTW-TV	Chicago	IL
WNIJ-FM	DeKalb	IL
WDCB-FM	Glen Ellyn	IL
WIUM-FM	Macomb	IL
WQPT-TV	Moline	IL

Media Outlet Name	Media Outlet City	Media Outlet State
WGLT-FM	Normal	IL
WCBU-FM	Peoria	IL
WTVP-TV	Peoria	IL
WQUB-FM	Quincy	IL
WGVV-FM	Rock Island	IL
WVIK-FM	Rock Island	IL
WUIS-FM	Springfield	IL
WMEC-TV	Springfield	IL
WILL-AM & WILL-TV & WILL-FM	Urbana	IL
WFIU-FM	Bloomington	IN
WTIU-TV	Bloomington	IN
WVPE-FM	Elkhart	IN
WNIT-TV	Elkhart	IN
WNIN-FM & WNIN-TV	Evansville	IN
WBNI-FM	Fort Wayne	IN
WFWA-TV	Fort Wayne	IN
WFYI-FM	Indianapolis	IN
WFYI-TV	Indianapolis	IN
WYIN-TV	Merrillville	IN
WBST-FM	Muncie	IN
WIPB-TV	Muncie	IN
WVUB-FM	Vincennes	IN
WVUT-TV	Vincennes	IN
WBAA-FM	West Lafayette	IN
KOOD-TV	Bunker Hill	KS
KANZ-FM	Garden City	KS
KHCC-FM	Hutchinson	KS
KRPS-FM	Pittsburg	KS
KTWU-TV	Topeka	KS
KMUW-FM	Wichita	KS
WKYU-FM	Bowling Green	KY
WKYU-TV	Bowling Green	KY
WNKU-FM	Highland Heights	KY
WUKY-FM	Lexington	KY
Kentucky Educational Television - WKET	Lexington	KY

Media Outlet Name	Media Outlet City	Media Outlet State
WFPL, WUOL, WFPK - Louisville Public Media	Louisville	KY
WMKY-FM	Morehead	KY
WKMS-FM	Murray	KY
WEKU-FM	Richmond	KY
WMMT-FM	Whitesburg	KY
WBRH-FM	Baton Rouge	LA
WRKF-FM	Baton Rouge	LA
KSLU-FM	Hammond	LA
KRVS-FM	Lafayette	LA
Louisiana Public Broadcasting Network	Lafayette	LA
WLAE-TV	Metairie	LA
WYES-TV	Metairie	LA
KEDM-FM	Monroe	LA
WWNO-FM	New Orleans	LA
WWOZ-FM	New Orleans	LA
KDAQ-FM	Shreveport	LA
WFCR-FM	Amherst	MA
WUMB-FM	Boston	MA
WBUR-FM	Boston	MA
WGBH-FM & WGBH-TV	Boston	MA
WOMR-FM	Provincetown	MA
WGBY-TV	Springfield	MA
WICN-FM	Worcester	MA
WEAA-FM	Baltimore	MD
WYPR-FM	Baltimore	MD
WBJC-FM	Baltimore	MD
WFWM-FM	Frostburg	MD
Maryland Network	Owings Mills	MD
WESM-FM	Princess Anne	MD
WSCL-FM	Salisbury	MD
WTMD-FM	Towson	MD
WERU-FM	East Orland	ME
Maine Network	Lewiston	ME
WMPG-FM	Portland	ME
WUOM-FM	Ann Arbor	MI

Media Outlet Name	Media Outlet City	Media Outlet State
WDET-FM	Detroit	MI
WRCJ-FM	Detroit	MI
WKAR-FM & WKAR-TV	East Lansing	MI
WFUM-TV	Flint	MI
WGVU-AM	Grand Rapids	MI
WMUK-FM	Kalamazoo	MI
WNMU-FM	Marquette	MI
WNMU-TV	Marquette	MI
WCMU-FM	Mount Pleasant	MI
WIAA-FM	Traverse City	MI
WBLV-FM	Twin Lake	MI
WDCQ-TV	University Center	MI
WTVS-TV	Wixom	MI
WEMU-FM	Ypsilanti	MI
KWCM-TV	Appleton	MN
KSMQ-TV	Austin	MN
KAWE-TV	Bemidji	MN
KUMD-FM	Duluth	MN
WDSE-TV	Duluth	MN
KAXE-FM	Grand Rapids	MN
KBEM-FM	Minneapolis	MN
KFAI-FM	Minneapolis	MN
KMOJ-FM	Minneapolis	MN
KUOM-AM	Minneapolis	MN
MPR	St. Paul	MN
KTCA-TV	St. Paul	MN
KRCU-FM	Cape Girardeau	MO
KOPN-FM	Columbia	MO
KBIA-FM	Columbia	MO
KJLU-FM	Jefferson City	MO
KCUR-FM	Kansas City	MO
KKFI-FM	Kansas City	MO
KCPT-TV	Kansas City	MO
KXCV-FM	Maryville	MO
KMST-FM	Rolla	MO
KDHX-FM	Saint Louis	MO
KSMU-FM	Springfield	MO
KOZK-TV	Springfield	MO
KWMU-FM	St. Louis	MO

Media Outlet Name	Media Outlet City	Media Outlet State
KETC-TV	St. Louis	MO
KTBG-FM	Warrensburg	MO
KMOS-TV	Warrensburg	MO
WUSM-FM	Hattiesburg	MS
WURC-FM	Holly Springs	MS
WJSU-FM	Jackson	MS
WMPN-FM	Jackson	MS
Mississippi Public Broadcasting/ WMPN	Jackson	MS
WPRL-FM	Lorman	MS
KEMC-FM	Billings	MT
KGLT-FM	Bozeman	MT
KUSM-TV	Bozeman	MT
KGPR-FM	Great Falls	MT
KGVA-FM	Harlem	MT
KUFM-FM	Missoula	MT
WCQS-FM	Asheville	NC
WUNC-FM	Chapel Hill	NC
WFAE-FM	Charlotte	NC
WTVI-TV	Charlotte	NC
WDAV-FM	Davidson	NC
WNCU-FM	Durham	NC
WRVS-FM	Elizabeth City	NC
WFSS-FM	Fayetteville	NC
WTEB-FM	New Bern	NC
WSHA-FM	Raleigh	NC
UNC-TV	Research Triangle Park	NC
WNCW-FM	Spindale	NC
WHQR-FM	Wilmington	NC
WFDD-FM	Winston-Salem	NC
WSNC-FM	Winston-Salem	NC
KEYA-FM	Belcourt	ND
KCND-FM & Prairie Public Television	Fargo	ND
KMHA-FM	New Town	ND
KABU-FM	St. Michaels	ND
KZUM-FM	Lincoln	NE
Nebraska Network	Lincoln	NE

Media Outlet Name	Media Outlet City	Media Outlet State
KIOS-FM	Omaha	NE
KVNO-FM	Omaha	NE
New Hampshire Public Radio, Inc.	Durham	NH
New Hampshire Network	Durham	NH
WNTI-FM	Hackettstown	NJ
WFMU	Jersey City	NJ
WBJB-FM	Lincroft	NJ
WBGO-FM	Newark	NJ
WNJT-FM	Trenton	NJ
WWFM-FM	Trenton	NJ
KANW-FM	Albuquerque	NM
KUNM-FM	Albuquerque	NM
KNME-TV	Albuquerque	NM
KCIE-FM	Dulce	NM
KGLP-FM	Gallup	NM
KRWG-FM	Las Cruces	NM
KRWG-TV	Las Cruces	NM
KABR-AM	Magdalena	NM
KENW-FM & KENW-TV	Portales	NM
KSHI-FM	Zuni	NM
KNPR-FM	Las Vegas	NV
KUNV-FM	Las Vegas	NV
KLVX-TV	Las Vegas	NV
KUNR-FM	Reno	NV
KNPB-TV	Reno	NV
WAMC-FM	Albany	NY
WSKG-FM	Binghamton	NY
WFUV-FM	Bronx	NY
WBFO-FM	Buffalo	NY
WNED-FM & WNED-TV	Buffalo	NY
WSLU-FM	Canton	NY
WEOS-FM	Geneva	NY
WJFF-FM	Jeffersonville	NY
WBAI-FM	New York	NY
WNYC-FM	New York	NY

Media Outlet Name	Media Outlet City	Media Outlet State
WNYE-TV & WNYE-FM	New York	NY
WNET-TV	New York	NY
WRVO-FM	Oswego	NY
WCFE-TV	Plattsburgh	NY
WXXI-FM & WXXI-TV	Rochester	NY
WLIU-FM	Southampton	NY
WAER-FM	Syracuse	NY
WCNY-FM & WCNY-TV	Syracuse	NY
WMHT-TV & WMHT-FM	Troy	NY
WPBS-TV	Watertown	NY
WAPS-FM	Akron	OH
WOUB-FM & WOUB-TV	Athens	OH
WBGU-TV	Bowling Green	OH
WGUC-FM	Cincinnati	OH
WCET-TV	Cincinnati	OH
WCPN-FM & WVIZ-TV	Cleveland	OH
WCBE-FM	Columbus	OH
WOSU-FM & WOSU-TV	Columbus	OH
WDPR-FM	Dayton	OH
WPTD-TV	Dayton	OH
WKSU-FM	Kent	OH
WNEO-TV	Kent	OH
WMUB-FM	Oxford	OH
WGTE-FM	Toledo	OH
WCSU-FM	Wilberforce	OH
WYSO-FM	Yellow Springs	OH
WYSU-FM	Youngstown	OH
KRSC-TV	Claremore	OK
KCSC-FM	Edmond	OK
KGOU-FM	Norman	OK
Oklahoma Network	Oklahoma City	OK
KOSU-FM	Stillwater	OK
KWGS-FM	Tulsa	OK

Media Outlet Name	Media Outlet City	Media Outlet State
KSOR-FM	Ashland	OR
KMUN-FM	Astoria	OR
KLCC-FM	Eugene	OR
KRVM-FM	Eugene	OR
KMHD-FM	Gresham	OR
KSYS-TV	Medford	OR
KBPS-FM	Portland	OR
KBOO-FM	Portland	OR
KOPB-FM & Oregon Public Broadcasting	Portland	OR
KWSO-FM	Warm Springs	OR
WDIY-FM	Bethlehem	PA
WLVT-TV	Bethlehem	PA
WQLN-TV & WQLN-FM	Erie	PA
WITF-TV & WITF-FM	Harrisburg	PA
WRTI-FM	Philadelphia	PA
WXPN-FM	Philadelphia	PA
WHYY-FM & WHYY-TV	Philadelphia	PA
WYBE-TV	Philadelphia	PA
WDUQ-FM	Pittsburgh	PA
WYEP-FM	Pittsburgh	PA
WQED-TV & WQED-FM	Pittsburgh	PA
WVIA-FM & WVIA-TV	Pittston	PA
WPSU-FM & WPSU-TV	University Park	PA
WLTR-FM and South Carolina Network	Columbia	SC
WSSB-FM	Orangeburg	SC
KLND-FM & KILI-FM & KUSD-FM & South Dakota Public Television	Multiple Cities	SD
WUTC-FM	Chattanooga	TN

Media Outlet Name	Media Outlet City	Media Outlet State
WTCI-TV	Chattanooga	TN
WCTE-TV	Cookeville	TN
WETS-FM	Johnson City	TN
WDVX-FM	Knoxville	TN
WUOT-FM	Knoxville	TN
WETP-TV	Knoxville	TN
WLJT-TV	Martin	TN
WKNO-FM	Memphis	TN
WKNO-TV	Memphis	TN
WMOT-FM	Murfreesboro	TN
WPLN-FM	Nashville	TN
WNPT-TV	Nashville	TN
KACU-FM	Abilene	TX
KACV-TV	Amarillo	TX
KMFA-FM	Austin	TX
KUT-FM	Austin	TX
KLRU-TV	Austin	TX
KVLU-FM	Beaumont	TX
KAMU-FM	College Station	TX
KEDT-TV & KEDT-FM	Corpus Christi	TX
KNON-FM	Dallas	TX
KERA-TV & KERA-FM	Dallas	TX
KTEP-FM	El Paso	TX
KCOS-TV	El Paso	TX
KMBH-TV & KMBH-FM	Harlingen	TX
KUHF-FM	Houston	TX
KPFT-FM	Houston	TX
KTSU-FM	Houston	TX
KUHT-TV	Houston	TX
KNCT-TV & KNCT-FM	Killeen	TX
KOHM-FM	Lubbock	TX
KTXT-TV	Lubbock	TX
KPBT-TV	Midland	TX
KOCV-FM	Odessa	TX
KPVU-FM	Prairie View	TX
KPAC-FM	San Antonio	TX

Media Outlet Name	Media Outlet City	Media Outlet State
KLRN-TV	San Antonio	TX
KTXK-FM	Texarkana	TX
KWBU-TV & KWBU-FM	Waco	TX
KUSU-FM	Logan	UT
KZMU-FM	Moab	UT
KPCW-FM	Park City	UT
KBYU-FM	Provo	UT
KBYU-TV	Provo	UT
KRCL-FM	Salt Lake City	UT
KUER-FM	Salt Lake City	UT
KUED-TV	Salt Lake City	UT
KUEN-TV	Salt Lake City	UT
WETA-TV & WETA-FM	Arlington	VA
WTJU-FM	Charlottesville	VA
WMRA-FM	Harrisonburg	VA
WVPT-TV	Harrisonburg	VA
WNSB-FM	Norfolk	VA
WHRO-TV & WHRV-FM	Norfolk	VA
WCVE-FM & WCVE-TV	Richmond	VA
WVTF-FM	Roanoke	VA
WBRA-TV	Roanoke	VA
WVPS-FM	Colchester	VT
Vermont Public Television	Colchester	VT
WGDR-FM	Plainfield	VT
KBCS-FM	Bellevue	WA
KSER-FM	Everett	WA
KDNA-FM	Granger	WA
KSVR-FM	Mount Vernon	WA
KAOS-FM	Olympia	WA
KWSU-AM	Pullman	WA
KWSU-TV	Pullman	WA
KUOW-FM	Seattle	WA
KEXP-FM	Seattle	WA
KCTS-TV	Seattle	WA
KPBX-FM	Spokane	WA

Media Outlet Name	Media Outlet City	Media Outlet State
KSPS-TV	Spokane	WA
KPLU-FM	Tacoma	WA
KBTC-TV	Tacoma	WA
WOJB-FM	Hayward	WI
WORT-FM	Madison	WI
Wisconsin Network (WHA-TV)	Madison	WI
Wisconsin Public Radio (WERN-FM, WLSU-FM, WHAD-FM, and WHA-AM)	Madison & La Crosse	WI
WYMS-FM	Milwaukee	WI
WUWM-FM	Milwaukee	WI
WMVS-TV	Milwaukee	WI
WXPR-FM	Rhineland	WI
WVPN-FM	Charleston	WV
WSWP-TV	Charleston	WV
WVLS-FM	Dunmore	WV
WVMR-AM	Dunmore	WV
Allegheny Mountain Radio	Bath County, Highland County, Pocahontas County	WV & VA
KUWR-FM	Laramie	WY
KCWC-TV	Riverton	WY

8 Appendix B: Non-broadcasters Included in Survey

Media Outlet Name	Media Outlet City	Media Outlet State
Harry Shearer	Los Angeles	CA
Independent TV Service	San Francisco	CA
NPR	Washington	DC
PBS	Washington	DC
XM Radio	Washington	DC
NBR Enterprises	Miami	FL
This I Believe	Louisville & Woods Hole	KY & MA
Dewey, Cheetham, and Howe	Boston	MA
Pipit & Finch	Boston	MA
Public Interactive	Boston	MA
PRX	Cambridge	MA
Living on Earth	Somerville	MA
Maryland Thinkport	Owings Mills	MD
PRI	Minneapolis	MN
American Public Media	St. Paul	MN
NAPTV	Lincoln	NE
National Native News	Albuquerque	NM
American Documentary, Inc	New York	NY
Jumpstart Productions, LLC	New York	NY
Out of the Blue Enterprises, LLC	New York	NY
Public AffairsTV, Inc	New York	NY
Scholastic	New York	NY

Media Outlet Name	Media Outlet City	Media Outlet State
ScienceFriday, Inc.	New York	NY
Sesame Workshop	New York	NY
WordWorld, LLC	New York	NY
Charlie Rose, Inc.	New York	NY
The Metropolitan Opera	New York	NY
World Music Productions	New York	NY
CBC	Toronto	ON
Lyons Partnership LP	Allen	TX
BBC World Service	London	UK
BBC/Ragdoll Ltd	London	UK
MacNeil/Lehrer Productions	Arlington	VA

9 Appendix C: Digital Media Survey

Scan of Digital Efforts in Public Media – A Study for the Corporation for Public Broadcasting

Hello! CPB is on a fact-finding mission to learn what stations are doing in the digital media realm. It's purely a strategic study, whose goal is to figure out what the Corporation for Public Broadcasting can do to help better support stations and content providers to be successful in this area. We appreciate your time in answering some questions related to your efforts in this area. The more commentary the better, so please feel free to give us whatever information you think would help CPB better understand your efforts and goals.

BROADCAST-RELATED QUESTIONS

First, we'd like to understand some detail about your broadcast offering (separate from any digital media offering).

1. What are the components of your broadcast offering? (For example, TV and Radio --- of TV, 20% children's programming via Sesame Place; 40% news via PBS content, 40% variety programming – self created; of Radio, ...)

RADIO:

TV:

2. Can you provide the demographics of your current audience?

RADIO:

TV:

3. Broadcast audience growth overall has been relatively flat -- how has it been for you?

RADIO:

TV:

DIGITAL-RELATED QUESTIONS

4. Let's review what you do in the digital realm. Some specific areas are listed below. If you have other areas, please add those as well.

Digital Media Outlet Study

Digital Offering	Types of content offered (news, education, entertainment, etc)	Target audience demographic and size of audience? Has this changed over time?	Is this content exclusive to digital or is it also available through broadcast (what was the intention for this content and how is it sourced)?	Why did you choose to offer this service? (e.g., grow audience, attract new demographic , etc.) – in other words, was there a ‘plan’ in place?	How is this offering branded? Do you have any partners? (e.g., your media branding, joint branding, separate branding, etc.) Why did you choose to do it this way?	Do you make money from this offering, and if so, how, and why this path? (e.g., sales, cost per use, advertising, royalty, etc.)	Do you consider the offering a success? Why? What is its growth rate?
podcasting download (audio)							
podcasting download (video)							
RSS feed							
mobile access							
live audio streaming							
live video streaming							
social networking							
Link to third party audio site							
Link to third party video site							
Blogs							
custom webpage							

on-demand audio							
on-demand video							
e-commerce							
e-newsletter							
Other (e.g. coloring pages, social bookmarking, community calendar, etc.)							
Other _____							
Other _____							
Other _____							
Other _____							

5. What percentage of your organization's total annual budget is allocated to digital media? (if possible can you allocate by digital media offering)

General Questions about future and past offerings.

6. How long ago was the launch of your first digital offering? Are you doing anything differently now than what you originally tried? Did you make any changes to any offerings significantly over time? And if so, why?

7. Any digital offerings you tried in the past that didn't work? (details)

a. If so, when did this/they launch?

- b. If so, how long ago was it shut down?
 - c. What was the reason for shutting it down?
8. Do you have any plans to launch digital media offerings in the near future?

We'd like to understand how your digital business sustains itself. Above we asked you questions by digital offering. If you were unable to answer some questions by offering, we'd at least like to understand your digital offerings in detail at a high level.

9. Can you tell us your sources of revenue for your digital offerings by source and percentages/ballpark dollar amount? (please include grants, underwriting, etc.)

TV digital offerings:

Radio digital offerings:

10. Did you set goals for your digital offerings? Was there some type of overarching strategy, or was their deployment opportunistic?
11. Do you measure the success of your digital offerings overall? How are they going so far? Are they profitable? If so, how profitable and over what time period?
12. How long did it take for you to recover your initial investment?
13. What is the annual growth rate of your digital offerings?
14. What is the size of your digital media audience? Please indicate usage by digital offering.
15. Please give us an idea of this digital media's audience makeup and if it varies by offering.
16. Did you notice a difference (from broadcast) in the audience who actually uses your digital media?
17. Has the makeup of this audience changed over time? What audience did you originally plan to target?
18. Has the volume of this audience changed over time?
19. Did you need to make any significant changes to your offering over time? If so, why?

20. What feedback have you received from your users?
21. Do you collect any user contact information? What information do you collect and how?
22. What, specifically is most unique and interesting about what you are doing in digital media, compared to other stations?
23. What other stations, do you think, are doing innovative work with digital media?

Thank you, we appreciate the time you spent to help the Corporation for Public Broadcasting understand your experience with digital media.

10 Appendix D: Definitions

Brand partner: organization (usually larger) that lends its name and/or logo to a project to enhance the recognition of a digital offering

Commercial: a digital offering that generates revenue

DMOS: refers to the database which holds the survey data from the CPB digital media scan

Digital, Digital Media, Digital Media Offering or Digital Offering: refers to any media distributed digitally. Most digital offerings are categorized under the following: live video/audio streaming, audio/video podcasting, RSS feeds, online community calendar, audio/video on demand, e-newsletter, e-commerce, blogs, links to third party audio/video sites or social networking. For this study, these terms do not include digital broadcasting (terrestrial or satellite) or re-transmission of digital broadcasting content by cable or telco television.

Media Outlet: public radio, public television, content provider, content producer, or non-broadcaster

NFFS: Non-federal financial support; used as a proxy for station size, designated as greatest, middle, or least

Non-commercial: a digital offering that does not generate revenue

Normalized: post-survey coded data to standardize open-ended questions for comparison

Offering: to any media distributed digitally. Most digital offerings are categorized under the following: live video/audio streaming, audio/video podcasting, RSS feeds, online community calendar, audio/video on demand, e-newsletter, ecommerce, blogs, links to third party audio/video sites or social networking.

Outlet: see “Media Outlet”

Sub-Area: additional details regarding specific stations producing content and other station details

User data: any information collected about or from a website’s visitor, such as contact information, preferences, or referral source

Non-broadcaster/Non-distributor: Content producers/providers who do not broadcast; typically a provider of content or an enabler of content management (e.g., PRX)

Category of Offering: Web, RSS, blog, on-demand content, audio and video streaming, social networking, podcasts, mobile technologies. Does not include scheduled broadcast, cable or satellite television and radio long-form program distribution channels, nor hard media/print distribution channels nor programs created for these channels. Also referred to individually or collectively as “digital offerings” or “offerings.”

Blogs: short for “Weblog,” a type of Web site or pages within a Web site, with regular entries of commentary

Custom Web page: a Web page that a user can customize to incorporate his/her own particular interests (e.g., MyYahoo)

Discussion Forum: or message board, is an online discussion site where participants interact by commenting on one topic at a time

E-Commerce: buying and selling of products or services over the Internet, completing the transaction

E-Newsletter: a newsletter delivered via email

Events Calendar: an interactive calendar published on the Internet; to be included in our study it must provide community related events NOT only media outlet related events

Link to Third-Party Audio/Video Site: web links to other operated websites to access content

Live Streaming Audio/Live Streaming Video: multi-media data transferred in real time

Mobile Access (to content): the ability to receive content on a cell phone or other hand-held electronic equipment

On-Demand Audio/On-Demand Video: either stream content through a set-top box, allowing listening/viewing in real time, or download it to a device such as a computer, digital video recorder, personal video recorder or portable media player for viewing/listening at any time

Podcasting: Audio/Video: podcast can refer either to the content itself or to the method by which the content is syndicated

RSS Feeds: Web feed formats used to publish frequently updated works—such as blog entries, news headlines, audio, and video—in a standardized format

Social Networking: online community, most likely with Facebook, MySpace, Twitter or Gather

Opportunistic: detailed thought was not put into offering; launched it with no clear goals in mind

Strategic: detailed thought was put into offering with specific goals in mind

Digital Branding: the application of marketing techniques for the advancement of a product, service, or organization's name

Alternative Branded Distribution: branding that is primarily of third party, but may be used to distribute content, increase awareness, etc. (e.g., Facebook, MySpace)

Online Pledging: ability to donate to media outlet online

Underwriting (by companies or by grants or unspecified): benefactor receives mention, advertising space, or other promotion (or combination) in exchange for financial support

Research conducted by
Gupta Consulting, LLC
2518B North Fairfax Drive
Arlington, VA 22201
www.consultgupta.com

on behalf of
Corporation for Public Broadcasting
401 Ninth Street NW
Washington, DC 20004
www.cpb.org



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