



# **A Snapshot: Station Use of Social Media**

An NCO Report

November 1, 2008

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## **Executive Summary**

NCO conducted a review of local station Web sites to gauge station use of social media for engaging communities. Between August 17 and September 5, 2008, NCO reviewed 322 local station Web sites, including virtually all the TV station Web sites and more than half of all radio station Web sites.

On each site, NCO staff:

- Inventoried use of 21 commonly known social media tools (see list at right), simply noting whether the station had or did not have each tool.
- Noted whether the station has any kind of community, outreach, or engagement presence online and the apparent nature of their engagement or outreach work and how they talk about it.

Given the dynamic nature of the Web, the reviewers' impressions represent only a snapshot of local station Web activity at a given point in time. Nonetheless, the reviewers' impressions are likely akin to—if not more thorough than—the perception any ordinary user would have had during the same time-period.

Our goal was to gauge the extent to which local stations are using social media tools at all and whether they are using social media tools for engaging communities.

## **Conclusions:**

- Public broadcasting station Web sites tend to be more station-centric than user-centric. Stations tend to use social media tools to distribute or “push” content rather than to invite user participation or authentically engage users in a two-way dialogue online.
- Nearly one-third of stations do not invite users to submit comments or other feedback online.
- Most local station Web sites do not use even low-cost tools that facilitate user participation, discussion, or networking (such as bulletin boards, forums, tagging, or networking tools like Facebook), resulting in a dearth of user-generated content on local station sites.
- Joint licensees use more social media tools than TV-only or radio-only licensees. TV-only stations lag joint and radio stations in use of social media tools. TV stations have the largest percentage of stations using few or no social media tools (23% of TV stations).
- Less than half of station Web sites make community, outreach, or engagement a major presence on their site (as a special section or navigation item).

### **Social Media Tool Checklist**

1. Blogs
2. Bulletin boards/forums
3. Comment, email, or other feedback tools
4. E-newsletters
5. Event calendar
6. Games & simulations
7. Mapping
8. Meet-up
9. My Source Testimonial Tool
10. Online courses or presentations
11. Photo-sharing (Flickr, Snapfish, etc.)
12. Podcasts
13. Polls or surveys
14. RSS feeds
15. Social networking (My Space, Facebook, Etc.)
16. Story gathering tool (not StoryShare)
17. StoryShare
18. Tags & bookmarking tools (Digg, Delicious, Reddit, etc.)
19. Twitter
20. Video-sharing (YouTube, etc.)
21. Wikis



- Based on the structure and communication on their Web sites, one-third of stations do not appear to be doing any kind of work to conduct outreach or engage their communities.
- Stations that have embraced the use of social media online are twice as likely to appear to be engaging offline (in-person) as well.
- Stations that use more social media tools appear to also engage more offline in their communities and to conduct more outreach activity. This correlation, coupled with existing academic research\* that shows online engagement tends to lead to offline engagement, is worth examining more deeply. Using social media tools online may be a largely untapped and relatively low-cost mechanism for public broadcasters to increase their overall engagement in their communities.

\* Research from the USC Annenberg School's Center for the Digital Future (2007); The Pew Internet and American Life Project (2008); and University of Wisconsin (Shah) all conclude that those who engage or interact online are often more likely to engage offline (in-person).

Clearly, the value and effectiveness of a station's online engagement isn't necessarily related to the sheer number of social media tools the station uses. Nonetheless, this informal review was a logical starting point and established a compelling baseline of information about the stations, their use of social media tools, and the impression their Web sites convey about stations' engagement in their communities.

Overall, public broadcasters have not embraced social media tools. Many use social media tools to distribute content rather than to engage users in a two-way exchange. Stations that have embraced social media tools, user-generated content, and two-way dialogue online appear to have a deeper level of engagement with their communities.

NCO recommends that any next steps include a more sophisticated examination of the relationship between online engagement and offline (in-person) activity in the community. Understanding that relationship more deeply is a key ingredient for helping stations increase their local significance and strengthen their communities.

## Use of Social Media Tools

NCO conducted a review of local station Web sites to gauge station use of social media for engaging communities.

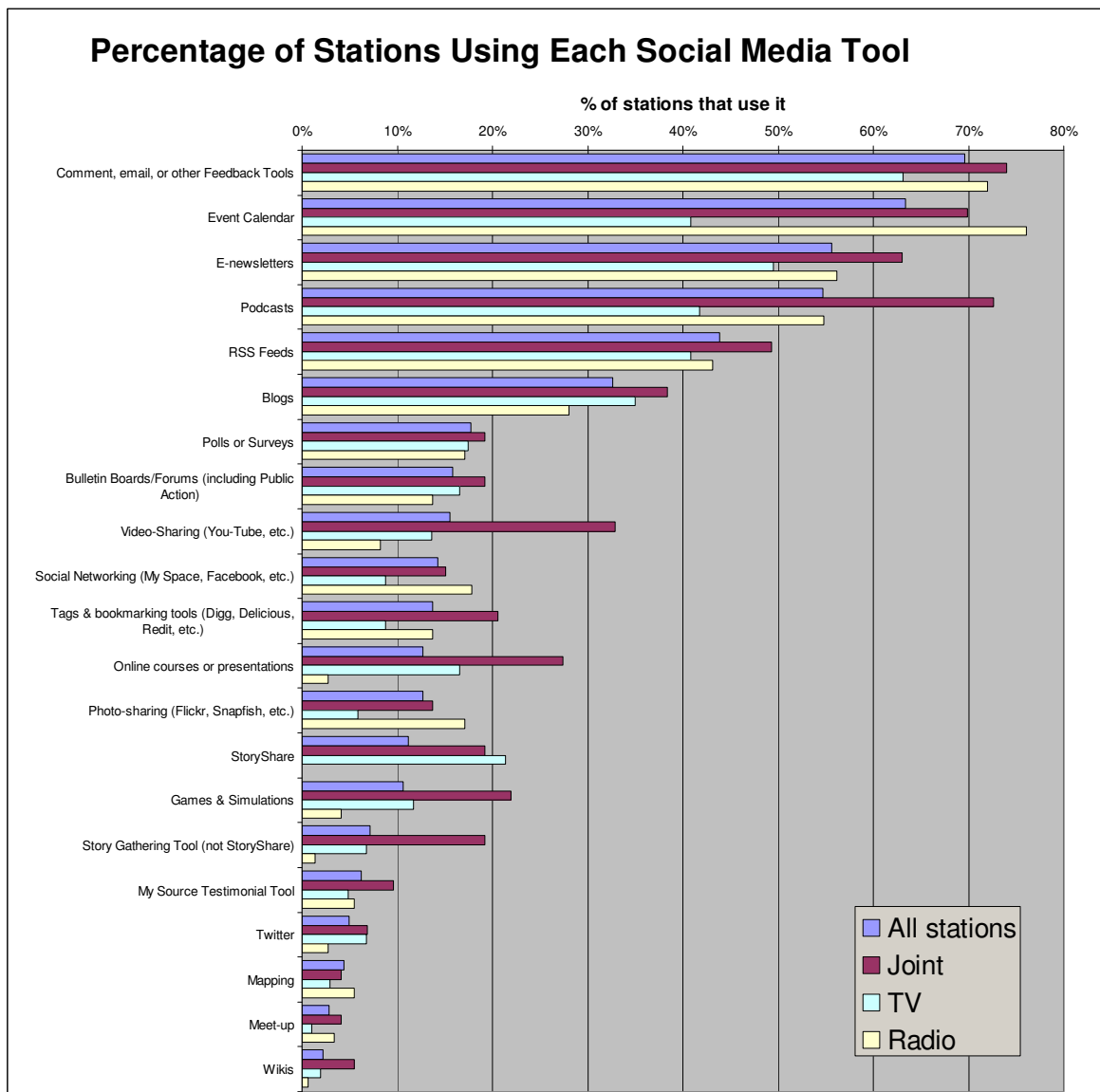
Between August 17 and September 5, 2008, NCO reviewed 322 local station Web sites, including:

- 74 joint licensees
- 103 TV-only licensees
- 146 radio-only licensees

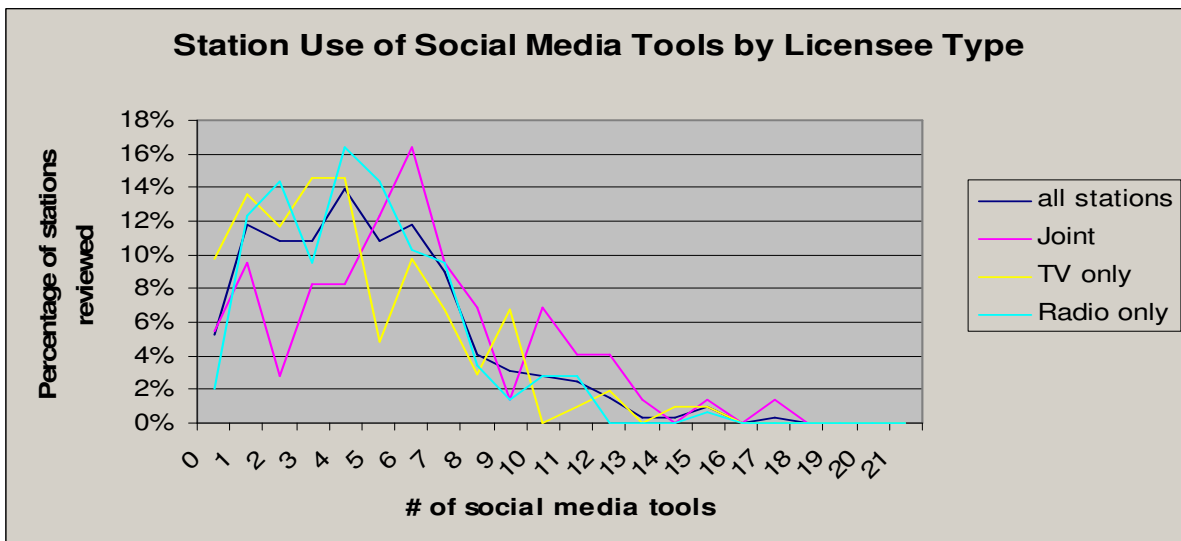
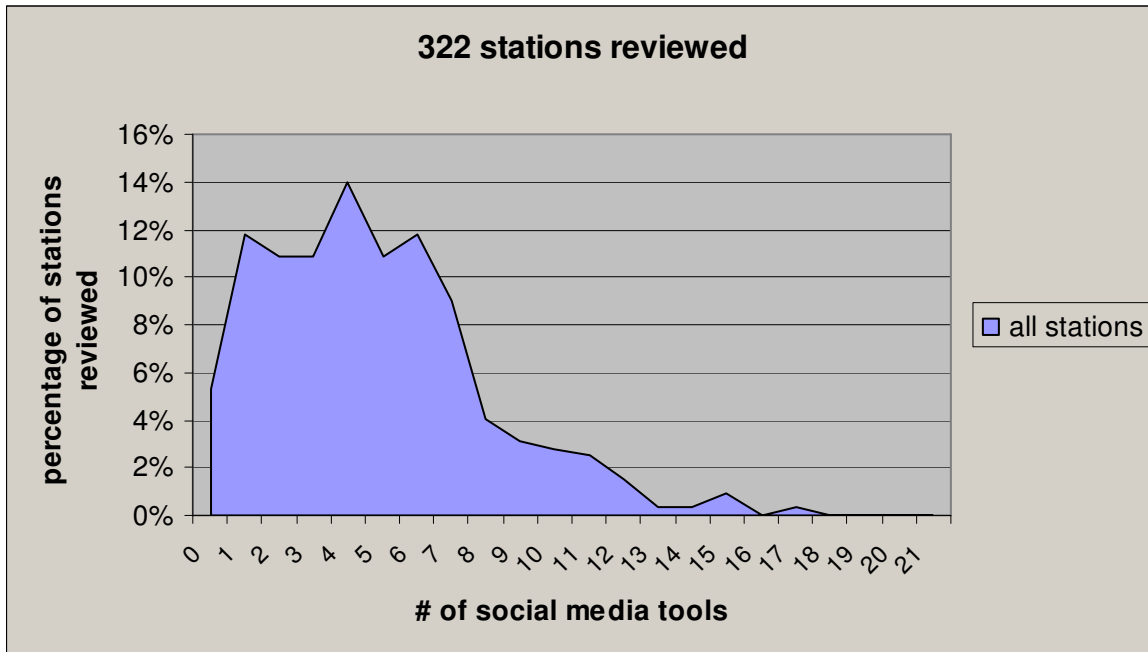
NCO staff reviewed virtually all the local TV station Web sites and more than half of all local radio station Web sites, including the 75 largest radio markets and a sampling of small markets.

On each site, reviewers inventoried the use of 21 commonly known social media tools, simply noting whether the station had or did not have each tool. Reviewers did not make a value judgment about whether the station was using a particular social media tool effectively. The purpose was simply to gauge whether the station is using (or not using) social media tools.

The chart below shows the list of social media tools in order of popularity among stations and the percentage of all stations using each. The chart also compares the station sites by licensee type.



Among the 322 station Web sites reviewed, half the stations have 4 or more social media tools and half have less, as illustrated by the chart below.



The chart above compares the percentage of stations with each number of social media tools by licensee type.

## Joint licensees use more social media tools than TV-only or radio-only licensees.

- More than half (39 of 73) of the joint licensees use six or more social media tools on their sites, whereas the median for TV-only and radio-only sites is four social media tools.
- Joint licensees represent nearly half of the top tier of stations with the most social media tools. Station size does not appear to be a factor for joint licensees as six of those 15 leading stations are considered small stations.

### Station Web Sites with the Most Social Media Tools (Top Tier of All Stations)

<u>21% of 73 Joint Sites</u>	<u>12% of 103 TV-only Sites</u>	<u>8% of 146 Radio-only Sites</u>
KQED WFYI PBA KPBS Vincennes Univ. Bdcstg. WSKG KUAC OPB WILL Georgia Public Bdcstg. KAKM Mississippi Public Bdcstg. WNIN WXXI SCETV	LPB KETC Detroit Public TV Maryland PTV Thirteen/WNET KCET UNC-TV WNEO/WEAO WSRE WTTW WVIZ WVPT	Minnesota Public Radio KCRW-FM KPFA-FM WBUR WXPB KPCC-FM KWMU WBEZ-FM WYMS-FM Louisville Public Media WAMU 88.5

- TV-only stations lag joint and radio stations in use of social media tools. TV stations have the largest percentage (23%) of stations using one or no social media tools (compared with 15% of joint sites and 14% of radio sites). Nearly 10% of TV station sites use no social media tools at all.
- 56 stations use only one or no social media tools on their Web sites. They represent 17% of the 322 station sites reviewed.

**Five most commonly used social media tools:**

1. Comment, email, or other feedback tool
2. Event Calendars
3. E-newsletters
4. Podcasts
5. RSS Feeds

	have %	have	have	have
<b>Social Media Tool</b>	<b>All stations</b>	<b>Joint</b>	<b>TV</b>	<b>Radio</b>
Comment, email, or other feedback tools	70%	74%	63%	72%
Event calendar	63%	70%	41%	76%
E-newsletters	56%	63%	50%	56%
Podcasts	55%	73%	42%	55%
RSS feeds	44%	49%	41%	43%
Blogs	33%	38%	35%	28%
Polls or surveys	18%	19%	17%	17%
Bulletin boards/forums (including Public Action)	16%	19%	17%	14%
Video-sharing (You-Tube, etc.)	16%	33%	14%	8%
Social networking (My Space, Facebook, etc.)	14%	15%	9%	18%
Tags & bookmarking tools (Digg, Delicious, Redit, etc.)	14%	21%	9%	14%
Online courses or presentations	13%	27%	17%	3%
Photo-sharing (Flickr, Snapfish, etc.)	13%	14%	6%	17%
StoryShare	11%	19%	21%	0%
Games & simulations	11%	22%	12%	4%
Story gathering tool (not StoryShare)	7%	19%	7%	1%
My Source Testimonial Tool	6%	10%	5%	5%
Twitter	5%	7%	7%	3%
Mapping	4%	4%	3%	5%
Meet-up	3%	4%	1%	3%
Wikis	2%	5%	2%	1%

**The social media tools stations most commonly use tend to distribute information or “push” content rather than encourage social interaction.**

- Three of the top five tools (e-newsletters, podcasts, and RSS feeds) are for pushing content one-way rather than engaging users in two-way exchange as the phrase “social media” implies.
- Beyond traditional comment/feedback opportunities, event calendars, and “push” tools like e-newsletters and podcasts, *none* of the other 17 social media tools on the checklist are used by more than 50% of the 322 station Web sites we reviewed.

**Nearly one-third of stations do not invite users to submit comments or other feedback online.**

- 30% of all stations have no online comment, email, or other user feedback mechanism. TV licensees lag other stations (joint and radio) in use of online comment, email, or other feedback mechanisms. Only 63% of TV sites have some kind of mechanism for users to make a comment or give feedback online.



**Most local station Web sites do not use even low-cost tools that facilitate user participation, discussion, or networking, resulting in a dearth of user-generated content on local station sites.**

- Relatively few stations—only 51 (16%) of the 322 sites we reviewed—afford users the opportunity to participate by contributing their thoughts or comments to online bulletin boards or forums.
- Less than 15% of station sites use any of the following: social bookmarking or tagging tools (such as Digg, Delicious, etc.); photo-sharing tools (like Flickr); or social networking sites (like Facebook or My Space). In each of these categories, TV-only sites lag both radio and joint licensee sites.

## **Community Engagement**

In addition to reviewing station Web sites for use of social media tools, reviewers noted whether stations have any kind of community, outreach, or engagement presence as a special section or navigation item on the site. The purpose was to note which stations have committed a portion of their Web site to their work in the community, either as an outreach effort or a more two-way engagement effort.

### **Less than half of station Web sites make *community, outreach, or engagement* a major presence on their site (as a special section or navigation item).**

- 41% of stations have some kind of community, outreach, or engagement presence online. 59% of stations have no section or navigation presence for community, outreach, or engagement.
- Other than a community events calendar, radio stations are significantly less likely to have a community presence or section online.
- Only 34% of stations specifically use the word *community* in a main navigation item or section online.
- Stations with a main navigation item that uses a word like *community, outreach, or education* also tend to use more social media tools.

### **Based on the structure and communication on their Web sites, one-third of stations do not appear to be doing any kind of work to conduct outreach or engage their communities.**

Reviewers were asked to make a judgment about the nature of the station's engagement or outreach work as communicated by the Web site itself. As apparent on the station's Web site, their engagement work was referenced in the following ways:

- 14% online engagement
- 15% offline (in-person) engagement
- 42% offline (program) outreach
- 33% none of these

Certainly, some of the stations that don't appear to be doing any outreach or engagement work, either online or off, may in fact be doing that work and just not making it part of their Web presence. However, if that's the case, then those stations are missing an opportunity to build awareness about the good work they are doing in their communities.

### **Stations that have embraced the use of social media online are twice as likely to appear to be engaging offline (in-person) as well.**

- Stations with the most social media tools on their Web sites (the top 10%) are more than twice as likely to appear to be engaging their communities offline. These stations are also almost twice as likely to be conducting offline outreach. In other words, stations that use the most social media tools online also appear much more likely to be engaging their communities in some way offline. It isn't clear if these stations are actually more engaged offline than stations that don't use a lot of social media tools or if these stations are perhaps just better at using their Web sites to talk about their offline work. Either way, the resulting impression is that these stations appear more engaged in their communities. This



correlation, coupled with existing academic research\* that shows online engagement tends to lead to offline engagement, is worth examining and understanding more deeply. Using social media tools online may be a largely untapped and relatively low-cost mechanism for public broadcasters to increase their overall engagement with their communities.

- Stations that appear most effective at engaging users also tend to invite more user-generated content and have more arrangements with other media or bloggers to create a robust content experience online. For example, KQED makes San Francisco Chronicle headlines available online and has guest bloggers. Similarly, WXPB in Philadelphia has a robust group of bulletin boards and bloggers. Other music stations, such as KPCC and KCRW, also generate a significant amount of online content via blogs.

\* Research from the USC Annenberg School's Center for the Digital Future (2007); The Pew Internet and American Life Project (2008); and University of Wisconsin (Shah) all conclude that those who engage or interact online are often more likely to engage offline (in-person).

## **Summary**

Given the dynamic nature of the Web, this informal review represents only a snapshot in time. Nonetheless, the reviewers' impressions are likely akin to - if not more thorough than - the perception any ordinary user would have had during the same time-period.

Our goal was to gauge the extent to which local stations are using social media tools at all and whether they are using social media tools for engaging communities. We further assessed whether the station has any kind of community, outreach, or engagement presence online and the apparent nature of their engagement or outreach work in the community as communicated through the station's Web site. After all, how a station talks online about its work in the community is one reflection of how the station thinks about and conducts that work.

Clearly, the value and effectiveness of a station's online engagement isn't necessarily related to the sheer number of social media tools the station uses. One might imagine a very effective and robust online engagement strategy built around only a few social media tools. And, of course, the opposite is also true: a station with a dozen social media tools may not be engaging users effectively at all. Nonetheless, this informal review was a logical starting point and established a compelling baseline of information about the stations, their use of social media tools, and the impression their Web sites convey about the stations' engagement in their communities.

Overall, public broadcasters have not embraced social media tools. Many use social media tools to distribute content rather than to engage users in a two-way exchange. Stations that have embraced social media tools, user-generated content, and two-way dialogue online appear to have a deeper level of engagement with their communities.

NCO recommends that any next steps include a more sophisticated examination of station online engagement content and the relationship between online engagement and offline (in-person) activity in the community. Understanding that relationship more deeply is a key ingredient for helping stations increase their local significance and strengthen their communities.

