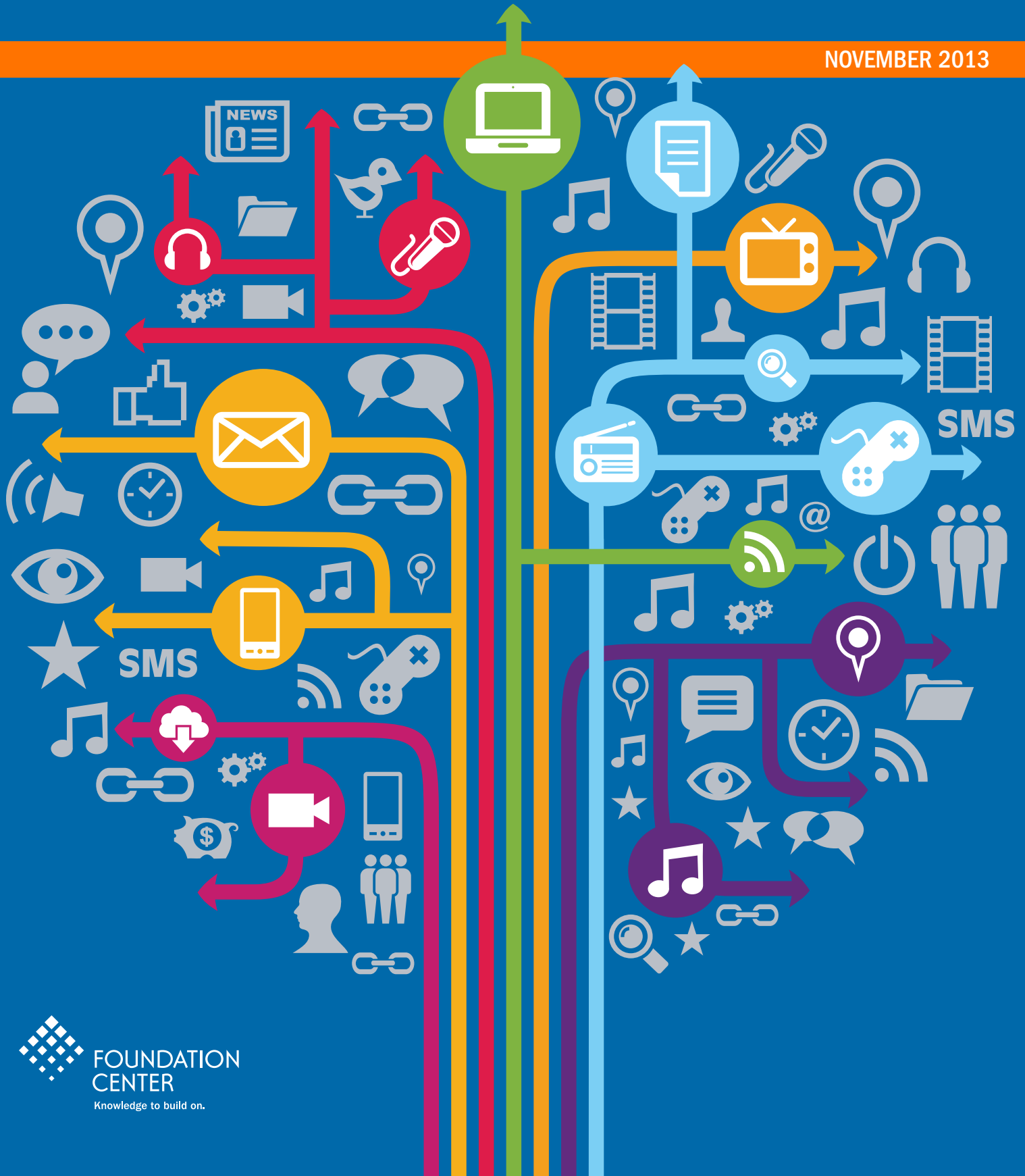


Growth in Foundation Support for Media in the United States

NOVEMBER 2013



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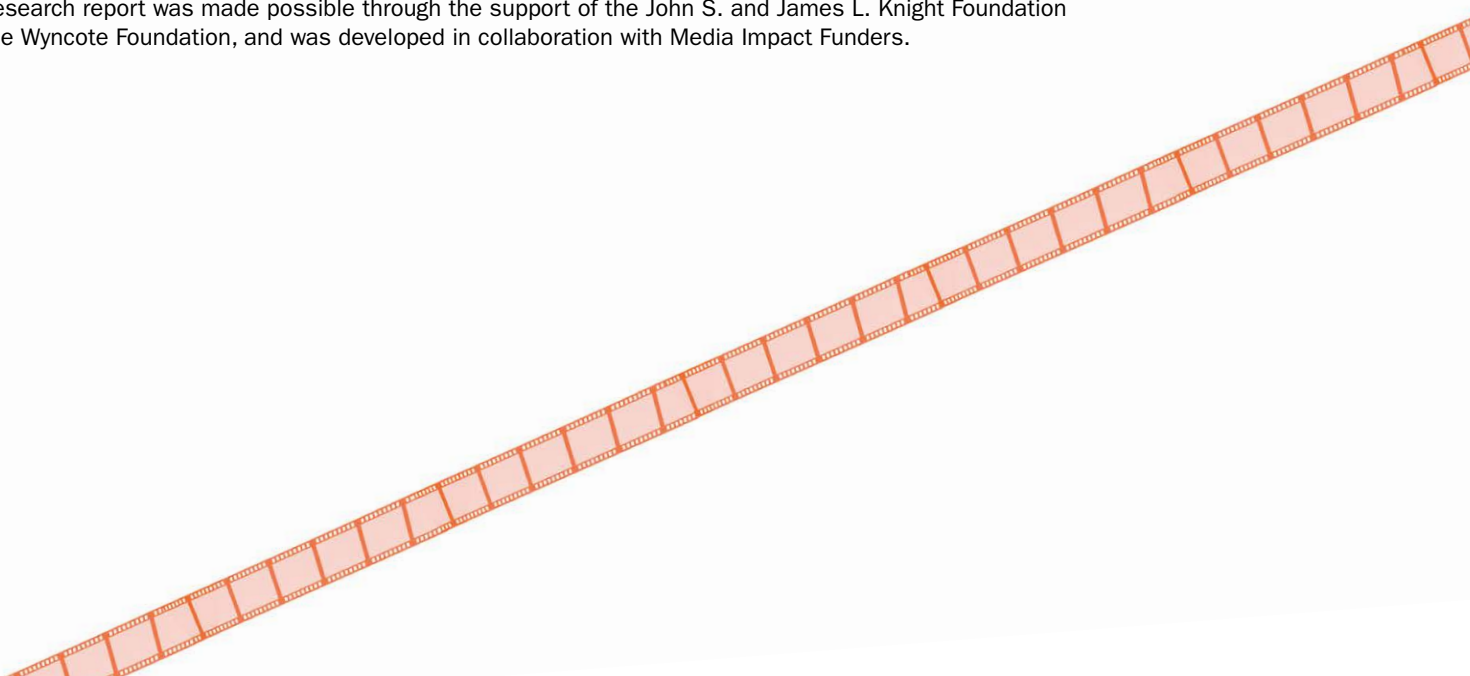
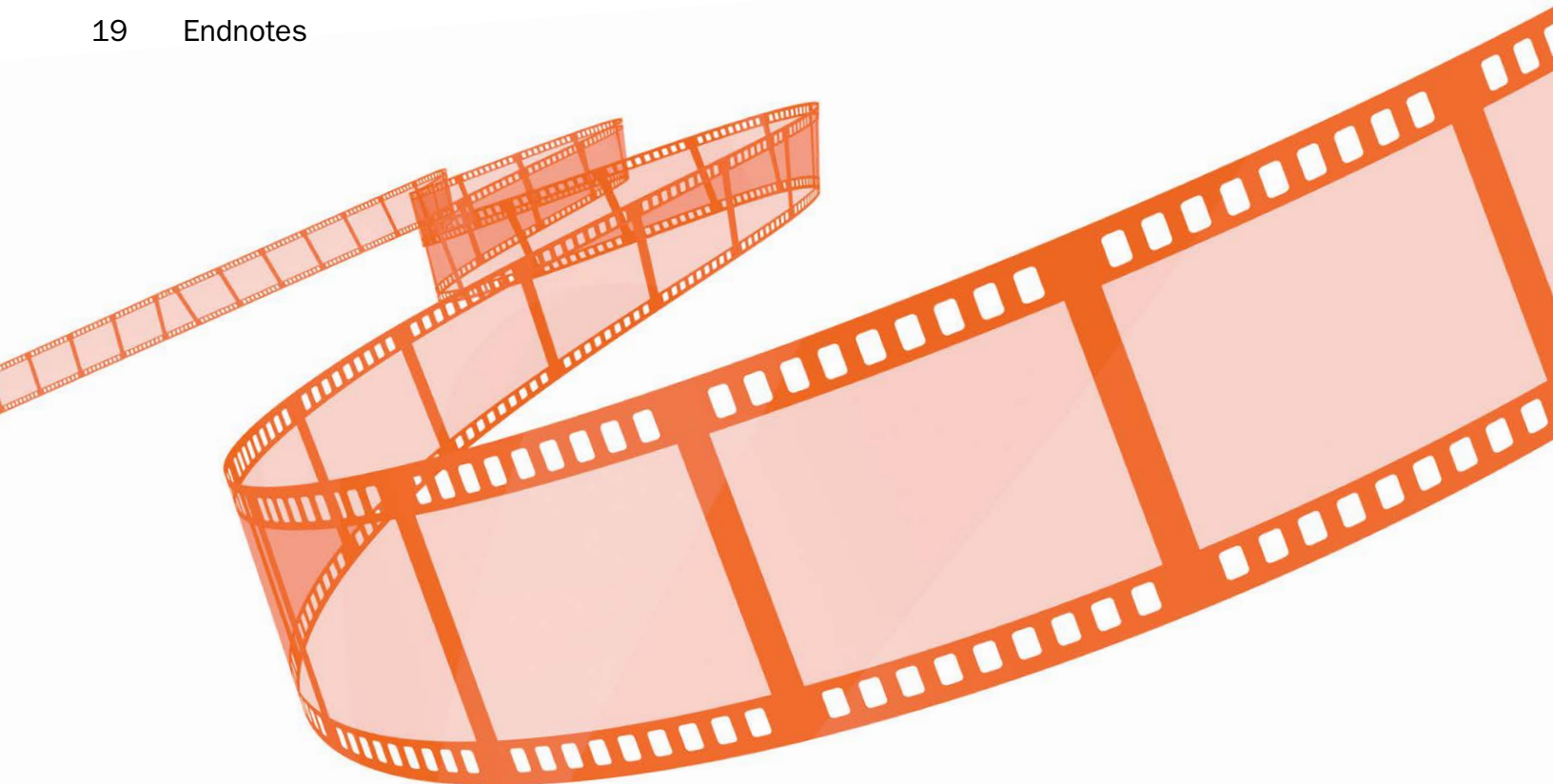


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Executive Summary

Over the last decade, media—the means by which we communicate—has evolved significantly. Television, radio, and print newspapers and magazines were once the primary means to obtain news and information. However, the rapid evolution of the Internet and mobile technology has generated new media platforms and expanded the universe of information creators, producers, and distributors. Media information once flowed in one direction, but the expansion of the field has made the movement more diffuse.

With this changing landscape as a backdrop, the Foundation Center, with support from the John S. and James L. Knight Foundation and the Wyncote Foundation, and in collaboration with Media Impact Funders, GuideStar, and the Ford Foundation, sought to provide a fuller picture of media-related grantmaking by U.S. foundations.

Tracking investments from 2009 to 2011, the data reveals that foundations are increasingly supporting media-related work across multiple areas. At the same time, they are tapping into larger trends, with investments in new media growing at a faster pace than traditional media investments. However, growth in grantmaking across the spectrum of media is inconsistent—with growth in public broadcasting falling behind growth in investments in other areas.

As demand for media funding continues to rise, these gaps are the most important ones to watch—especially considering the 2011 Federal Communications Commission report, *The Information Needs of Communities*, which called for philanthropy to play a bigger role in supporting media.¹ Since this is a baseline assessment, it will be crucial to see how media grantmaking evolves.

\$1.86 BILLION
was awarded in media-related grants from 2009 to 2011.

Media-related grantmaking grew at a **HIGHER RATE** than domestic grantmaking between 2009 and 2011.

DATA HIGHLIGHTS

- 1,012 foundations made 12,040 media-related grants totaling \$1.86 billion from 2009 to 2011
- If treated as a single category, media-related grantmaking would have ranked seventh in domestic grantmaking in 2011 (\$687.6 million), placing it just behind environment (\$1.5 billion) and just ahead of science and technology (\$535 million), religion (\$471 million), and the social sciences (\$234 million)
- Media-related grantmaking grew at a higher rate than overall domestic grantmaking from 2009 to 2011 (21 percent increase vs. 5.8 percent, respectively)
- Media grantmaking was categorized under five primary focus areas. Four areas experienced increases, with media application and tools having the highest level of growth (107.8 percent) and telecommunications infrastructure having the only decrease (48.4 percent)
- Following broader societal trends, the growth in foundation support for new media (Web-based and mobile) vastly outpaced the growth in support for traditional media (print, television, and radio) by a factor of four (116.5 percent vs. 29.4 percent) from 2009 to 2011

Media is a very broad term that means different things to different people. For the purposes of this report, media-related grantmaking activity includes substantive work in media such as journalism and media policy, infrastructure activities such as broadband installation, and activities that use media as a means to an end, such as educational programs broadcast on television.

DEFINING MEDIA

Journalism, News, and Information

The field which describes journalism, public information, and public education provided through media outlets. Includes general news and information, reporting on current events, stories and information in specific subject areas, and public service announcements.

Media Access and Policy

The right and ability of the public to have direct access to media content and the right and ability of a content provider to have direct access to the public. This includes access to appropriate technologies, full and complete data, a wide range of information sources, and resources that allow transparency and comprehensibility in communication.

Media Applications and Tools

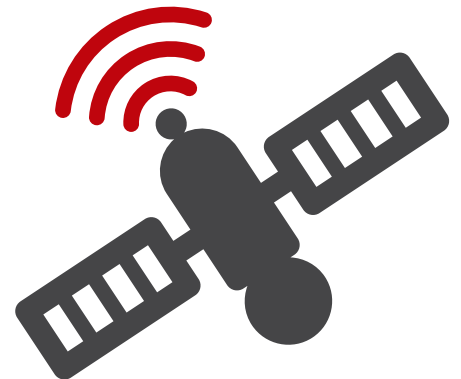
Electronic technology and software that assist in the creation, structuring, and delivery of information, communications, data, entertainment, artwork, and other content. These technologies are often interactive, digital, networked, and/or user-generated.

Media Platforms

Newspaper, television, cable, video, film, website, or radio production; training and programming; and/or educational programs related to the media. This category also includes associations of writers.

Telecommunications Infrastructure

Information and communications technology and the services which provide, maintain, and manage them. This includes telecommunications utilities, equipment, and services, Internet provision and governance, “cloud” data processing and management, and other large-scale digital services.



Background

Over the last decade, media—the means by which we communicate—has evolved significantly. Television, radio, and print newspapers and magazines were once the primary means to obtain news and information. However, the rapid evolution of the Internet and mobile technology has generated new media platforms and expanded the universe of information creators, producers, and distributors. Media information once flowed in one direction, but the expansion of the field has made the movement more diffuse.

Recent data from the Pew Internet & American Life Project capture these trends:

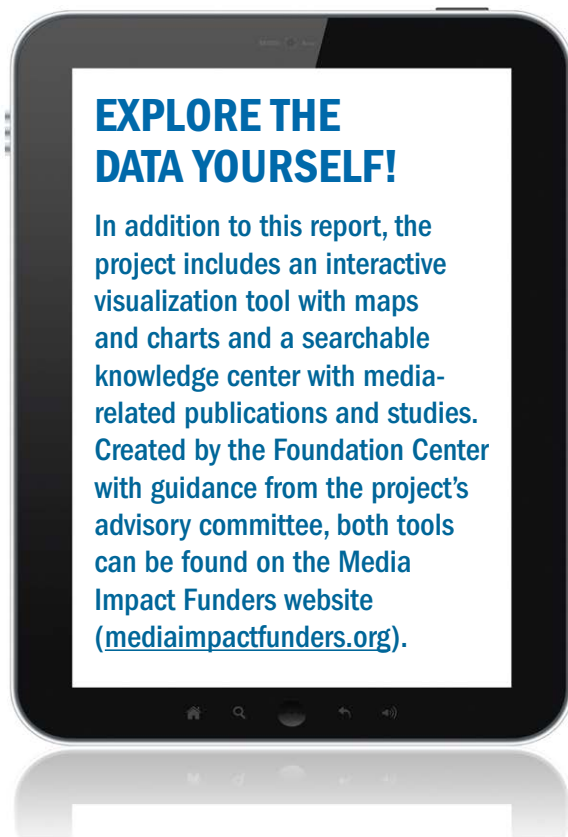
- Over two-thirds of the U.S. adult population access local news through a mix of traditional, Web-based, and mobile media²
- 72 percent of U.S. adults on the Internet use social networking sites such as Facebook, LinkedIn, and Twitter³
- 80 percent of U.S. adults have a broadband connection at home and/or own a smartphone⁴

With this changing landscape as a backdrop, the Foundation Center, with support from the John S. and James L. Knight Foundation and the Wyncote Foundation, and in collaboration with Media Impact Funders, GuideStar, and the Ford Foundation, sought to provide a fuller picture of media-related grantmaking by U.S. foundations.

This report provides a useful baseline to

TRACK FOUNDATION SUPPORT of media over time.

This is the **MOST COMPREHENSIVE** and detailed picture of media-related funding by foundations to date.



This project builds on previous work that has examined foundation support for media. Some of this earlier research examined specific aspects of media-related support, such as public broadcasting and news and information.⁵ Other studies highlighted media-related funding activity among a subset of foundations.⁶ And still other research provided a big picture view of public and private funding for media across multiple media-related domains.⁷ This work expands upon the earlier studies by providing a comprehensive and detailed view of media-related funding across different types of subjects. It also serves as a useful baseline for tracking foundation support for media-related activities over time.

Methodology

This work began with an extensive review of the Foundation Center's taxonomy which is used to categorize grantmaking activity. An advisory committee, composed of individuals leading media-related work at their respective philanthropic, research, and nonprofit organizations, was engaged in this review process throughout 2012.

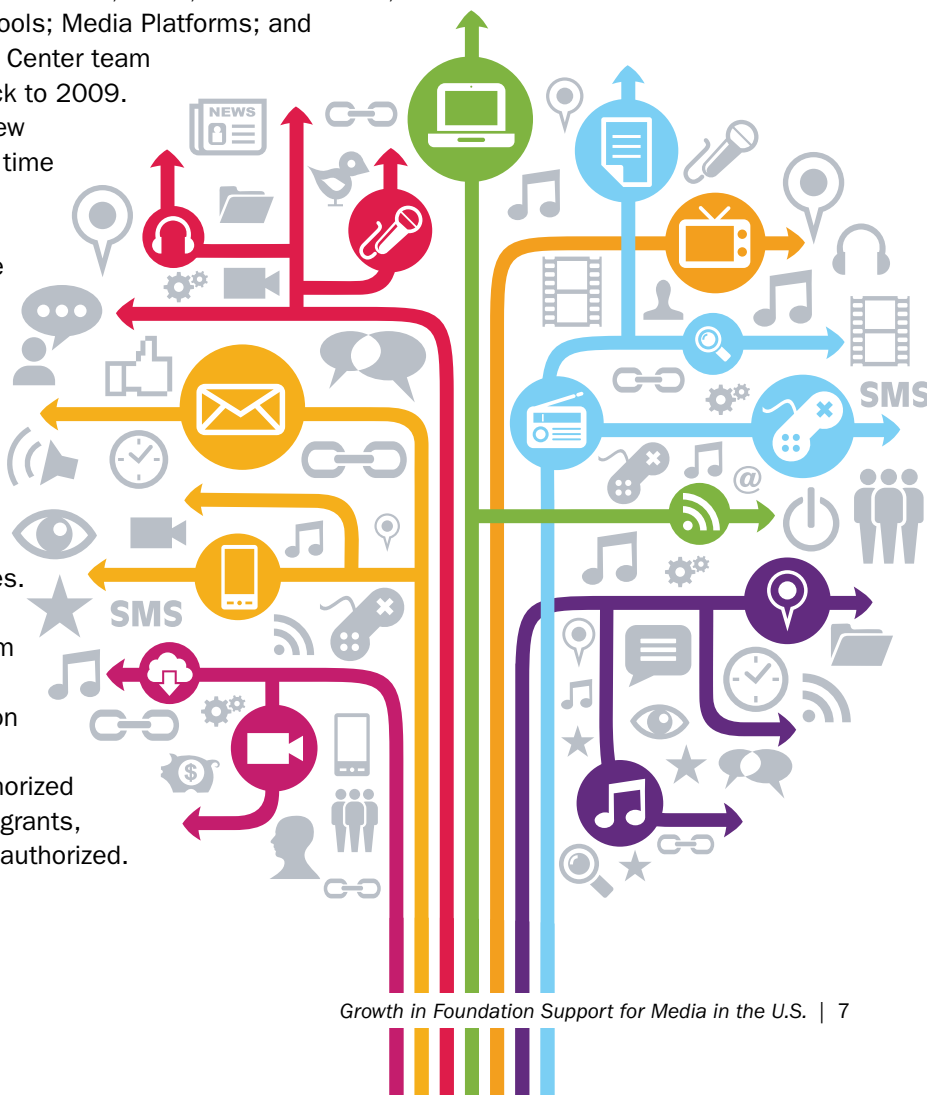
For the purposes of getting a comprehensive picture of media-related grantmaking activity, we include in our definition of media:

- Journalism (both the practice and education)
- Policies and other efforts that support equitable access and rights to disseminate information (e.g., freedom of expression and media literacy)
- Applications and tools that create and structure the delivery of information (e.g., geographic information systems and Drupal)
- Platforms through which information is communicated (e.g., television, print, and mobile)
- Infrastructure that enables communication to occur (e.g., broadband)

Within these areas, multiple sub-categories were established to get a more nuanced picture of media funding. This resulted in a 29-code taxonomy to capture media-related grantmaking activities in five major areas: Journalism, News, and Information; Media Access and Policy; Media Applications and Tools; Media Platforms; and Telecommunications Infrastructure. The Foundation Center team used this taxonomy to retroactively code grants back to 2009.

All grants moving forward will be coded using the new taxonomy. This taxonomy will also be revisited over time for additional refinement, as necessary.

The data highlighted in this report are based on the Foundation Center's annual research data sets which include all grants of \$10,000 or more awarded to organizations by more than 1,000 of the largest private and community foundations in the U.S., including the top 15 funders in most states (see "Types of Foundations, 2009-2011" on page 9). One public charity was also included (Robert R. McCormick Foundation) because of the level of funding it provides to media-related activities. Grants that received at least one media-related activity code were included in the set. Excluded from these analyses are grants that were awarded to support activities outside of the U.S. The Foundation Center research set captures a little over half of all grantmaking activity in the U.S. All grants were authorized between 2009 and 2011. In the case of multi-year grants, all dollars were allocated to the year the grant was authorized.



Total Foundation Funding for Media in the U.S.

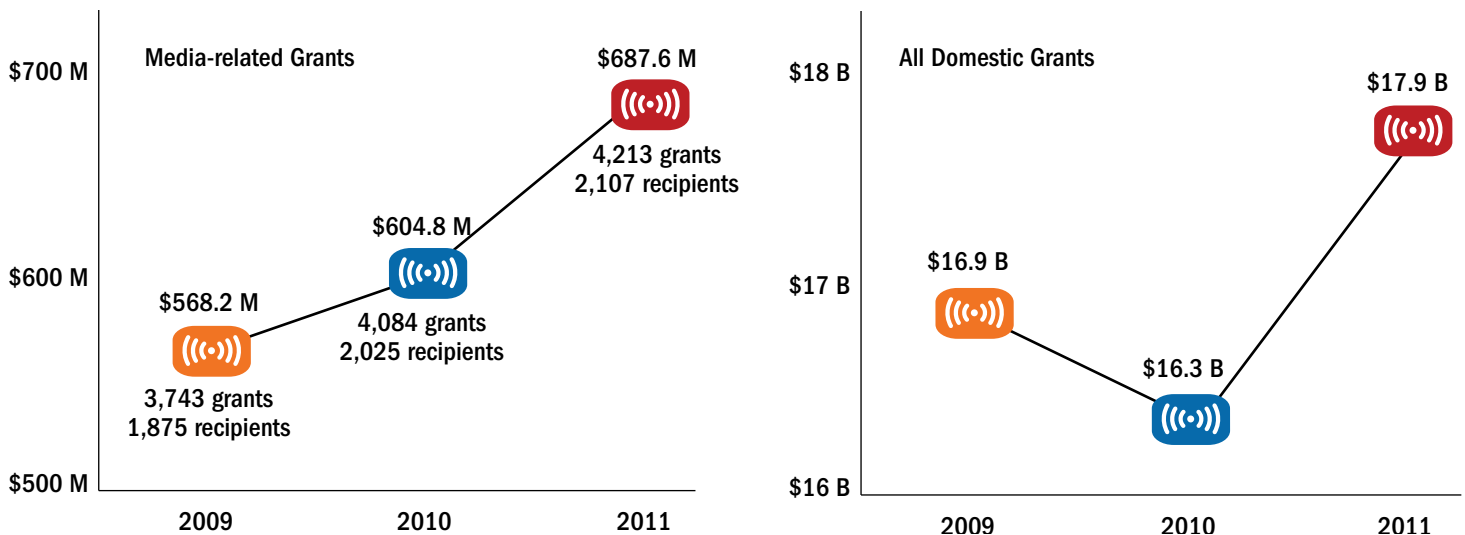
From 2009 to 2011, over 1,000 foundations authorized more than \$1.86 billion in media-related grants. Trends across the three years show that while the number of funders has remained steady, the number of grantee organizations, total number of grants, and total grant dollars authorized have increased over time. While less than 4 percent of total grant dollars for domestic purposes went to support media-related activities, the share of media-related grantmaking increased between 2009 and 2011. This increase reflects the fact that media-related grantmaking grew at a faster rate than grantmaking overall between 2009 and 2011 (21 percent vs. 5.8 percent, respectively). If treated as a single category, media-related grantmaking would have ranked seventh in domestic grantmaking in 2011 (\$687.6 million), placing it just behind environment (\$1.5 billion) and just ahead of science and technology (\$535 million), religion (\$471 million), and the social sciences (\$234 million).⁸

Media funding increased
21 PERCENT
from 2009 to 2011.

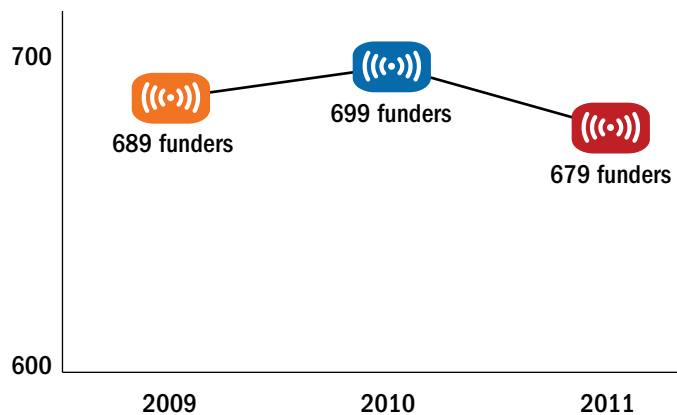
Although funding increased,
the number of funders
**REMAINED
STEADY.**

It is difficult to determine how these funding estimates compare to previous studies because the nature of earlier studies differed significantly from this one. However, given the scope of this project, this is the most comprehensive estimate to date of foundation giving for media-related activities.

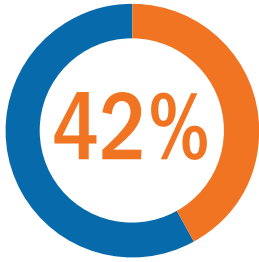
GROWTH IN U.S. FOUNDATION SUPPORT FOR MEDIA



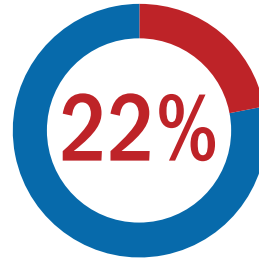
TOTAL NUMBER OF FUNDERS



Top Funders and Recipients of Media Funding in the U.S.



Percentage of total grant dollars awarded by the top 10 media funders



Percentage of total grant dollars received by the top 10 media recipients

TOP 10 FUNDERS, 2009–2011

The Freedom Forum, Inc.*	\$127.8 M
Bill & Melinda Gates Foundation	\$126.7 M
John S. and James L. Knight Foundation	\$105.4 M
The John D. and Catherine T. MacArthur Foundation	\$82.9 M
Ford Foundation	\$79.2 M
Annenberg Foundation	\$73.8 M
The Andrew W. Mellon Foundation	\$52.6 M
Lucasfilm Foundation	\$51.0 M
Alfred P. Sloan Foundation	\$45.6 M
Donald W. Reynolds Foundation	\$43.2 M

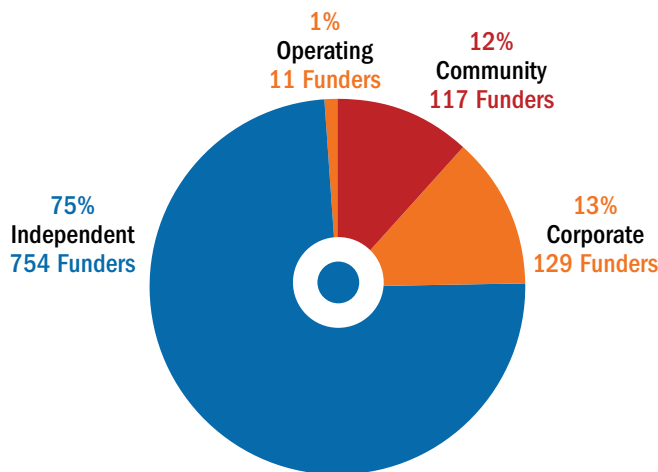
* 95 percent of funds went to support the *Newseum*.

TOP 10 RECIPIENTS, 2009–2011

Newseum	\$123.6 M
University of Southern California	\$115.9 M
THIRTEEN	\$41.5 M
National Public Radio	\$26.7 M
WGBH Educational Foundation	\$26.5 M
WETA-Greater Washington Educational Telecommunications Association	\$21.9 M
University of Missouri	\$20.9 M
University of California	\$14.6 M
Minnesota Public Radio	\$13.1 M
University of Nevada Reno Foundation	\$12.5 M

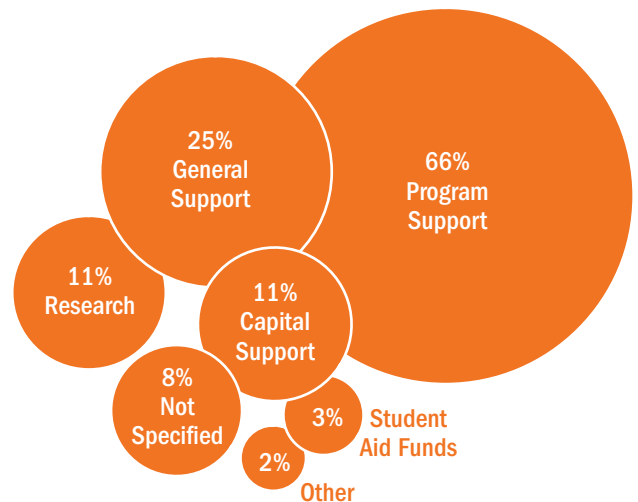
Some large media organizations may not appear on this list if significant proportions of their funding came from individuals or public charities. This study focuses specifically on the giving of private and community foundations.

TYPES OF FOUNDATIONS, 2009–2011



Total exceeds 100 percent due to rounding. This research data set includes 1,011 foundations categorized above and the addition of one grantmaking public charity.

TYPES OF SUPPORT, 2009–2011

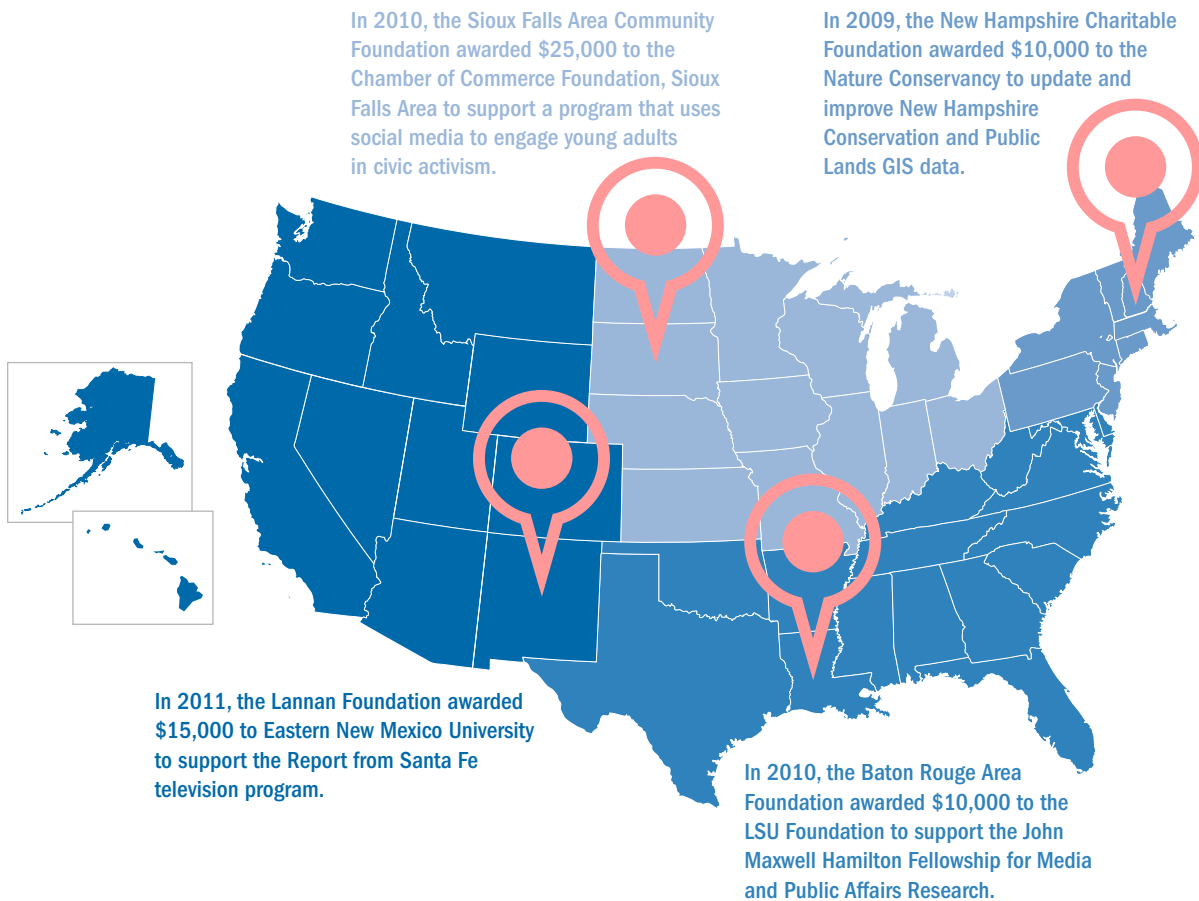


Total exceeds 100 percent because grants may be for multiple types of support and thus are counted more than once.

Geographic Location of Recipient Organizations

Grant activity for media occurred in all 50 states and Washington, DC. Organizations in the Western region of the U.S. received the largest amount of grant dollars, although the South was close behind. California led all states, followed by New York, Washington, DC, Massachusetts, and Illinois.

GEOGRAPHIC LOCATION OF RECIPIENT ORGANIZATIONS 2009–2011



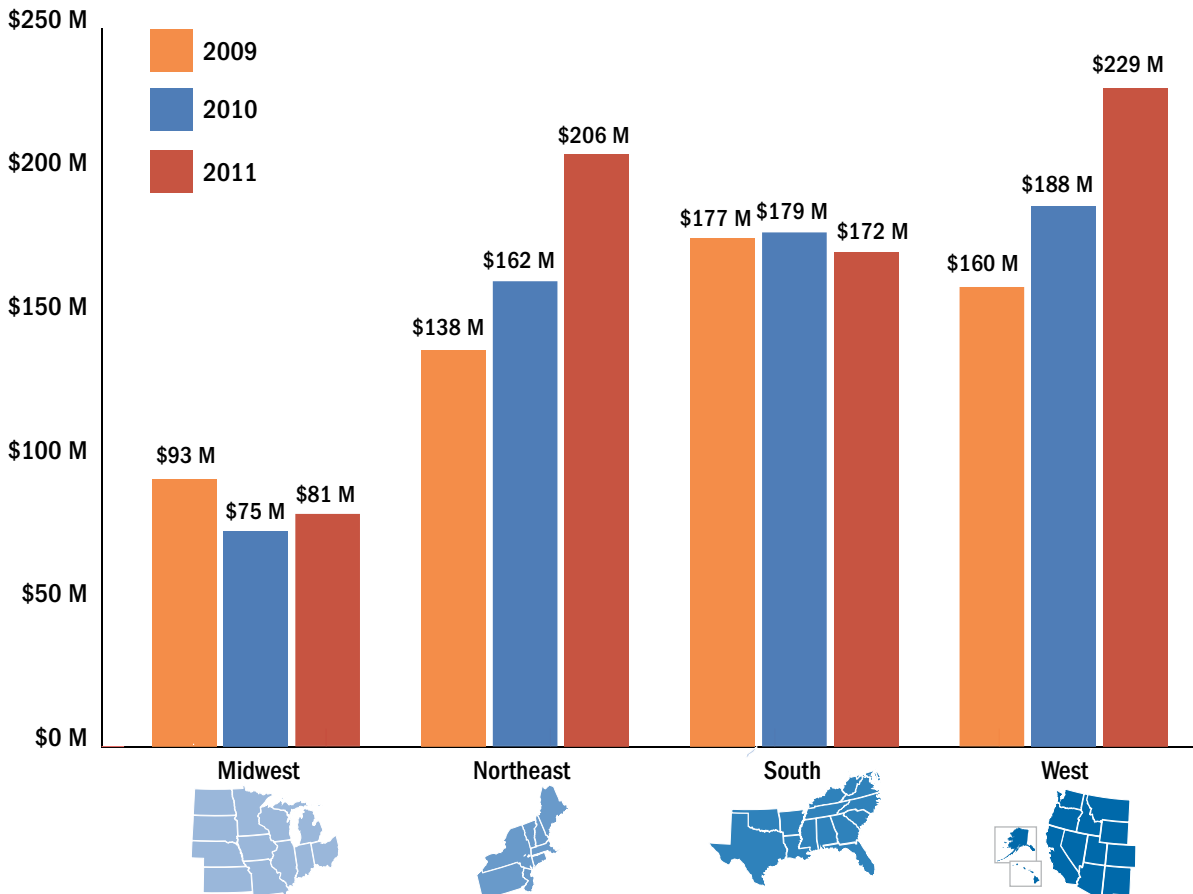
West	31.1%	\$577.7 M	Northeast	27.2%	\$505.9 M
South	28.3%	\$527.2 M	Midwest	13.4%	\$249.4 M

For an interactive visualization tool with maps and charts of this research data set plus additional data from 2009–present, visit mediaimpactfunders.org.

Trends in Giving by Geographic Location of Recipient Organizations

While grant dollars awarded to organizations in the Northeast and West increased from 2009 to 2011 (49 percent and 42.8 percent increase, respectively), grant dollars to organizations in the Midwest and South declined during that same time frame (12.7 percent and 2.9 percent, respectively).

REGIONAL FUNDING TRENDS, 2009–2011



TOP FIVE STATES, LOCATION OF RECIPIENT ORGANIZATION

	2009	2010	2011	2009–2011
1	California	California	California	California
2	Washington, DC	New York	New York	New York
3	New York	Washington, DC	Washington, DC	Washington, DC
4	Massachusetts	Illinois	Massachusetts	Massachusetts
5	Missouri	Massachusetts	Pennsylvania	Illinois

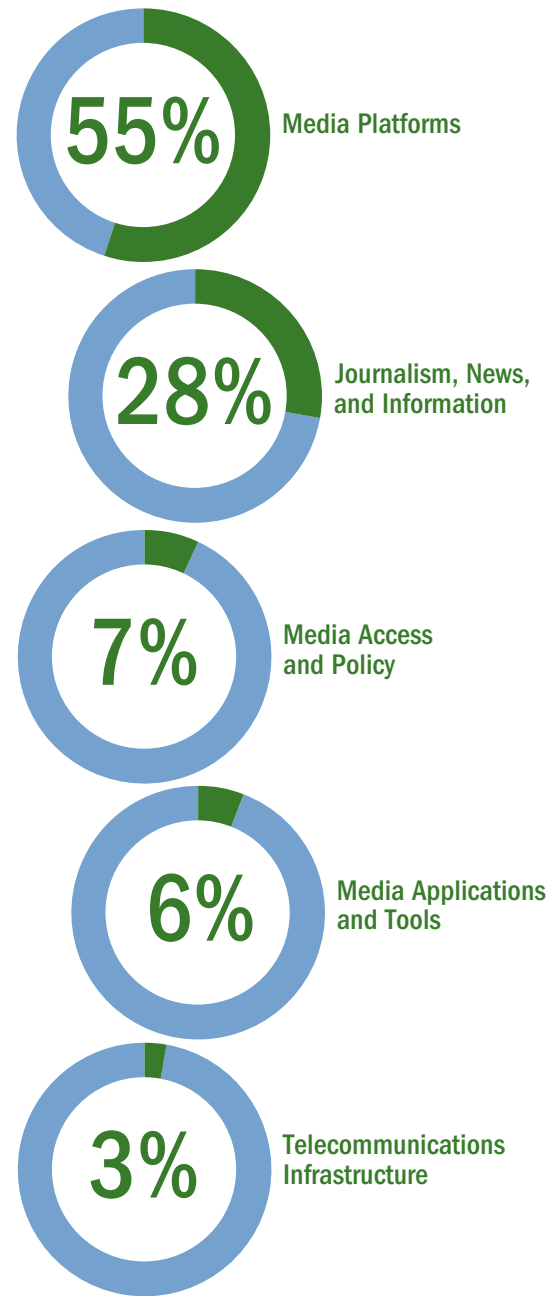
Media Funding by Primary Media Subject Area*

About 55 percent of all media grant dollars supported activities related to **media platforms** (e.g., television, radio, mobile, and print from 2009 to 2011). Within this category, Web-based media received the most grant dollars at 16.4 percent. **Journalism, news, and information** was second in funding, taking in over 28 percent of all grant dollars. Interactive games had the highest median grant amount (\$286,661) while audio had the lowest (\$21,000).

For an interactive visualization tool with maps and charts of this research data set plus additional data from 2009–present, visit mediaimpactfund.org.

MEDIA FUNDING BY PRIMARY MEDIA ACTIVITY, 2009–2011

SUBJECT	DOLLAR VALUE OF GRANTS		MEDIAN GRANT AMOUNT
	AMOUNT	%	
Total Media Platforms	\$1,019,096,074	54.8	\$35,000
Web-based media	305,428,040	16.4	60,000
Media platforms, general	227,189,712	12.2	50,000
Film/video	178,687,976	9.6	25,000
Television	148,598,006	8.0	30,000
Radio	84,414,820	4.5	25,000
Print	61,002,693	3.3	25,000
Audio	7,161,623	0.4	21,000
Mobile media	6,613,204	0.4	75,000
Total Journalism, news, and information	\$527,312,344	28.3	\$50,000
Journalism, news, and information, general	333,748,058	17.9	50,000
Journalism education and training	146,377,106	7.9	50,000
Investigative journalism	27,898,180	1.5	52,500
Advocacy journalism	7,345,100	0.4	62,500
Constituency journalism	7,270,353	0.4	50,000
Citizen journalism	4,673,547	0.3	100,000
Total Media access and policy	\$134,730,902	7.2	\$50,000
School and public library media centers	35,559,920	1.9	220,000
Media justice	23,526,060	1.3	60,000
Media democracy	20,457,742	1.1	26,000
Media access and policy, general	20,354,708	1.1	139,955
Media literacy	13,273,757	0.7	24,950
Open government	9,237,615	0.5	60,938
Intellectual property	8,473,100	0.5	80,852
Freedom of expression/First amendment	3,848,000	0.2	30,000
Total Media applications and tools	\$108,731,923	5.8	\$100,000
Media applications and tools, general	60,615,281	3.3	100,000
Interactive games	25,651,729	1.4	286,661
Geographic information systems	22,464,913	1.2	81,000
Total Telecommunications infrastructure	\$46,164,576	2.5	\$40,000
Internet access	22,065,846	1.2	25,000
Telecommunications	16,512,522	0.9	45,000
Internet and broadband	6,813,784	0.4	50,000
Telecommunications infrastructure, general	772,424	0.0	100,000
Media, multiple areas	\$24,584,974	1.3	\$75,000



* The data reported on pages 12–17 are based on the primary media-related activity. Eight-two percent of grants had only one media-related activity. The remaining 18 percent of grants were coded with more than one media-related activity. Of these, nearly all were coded according to the primary substantive media-related activity (e.g., a grant with investigative journalism and television activity was coded as investigative journalism). For a little over 1 percent of grants analyzed, it wasn't possible to assign a primary code. These grants are captured under "media, multiple areas."



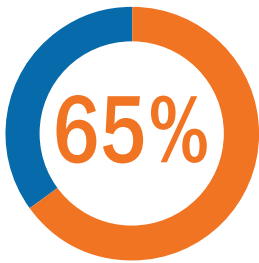
Journalism, News, and Information: A Closer Look

Overall, the pattern of grant activity for journalism, news, and information over time is mixed. While there was a dip in the share of journalism-related grants and dollars from 2009 to 2010, the share of journalism-related activity increased in 2011 and surpassed 2009 levels (7.5 percent increase from 2009 to 2011). This pattern, however, seems to be driven by the fact that six of the 10 largest grants in journalism were authorized in 2009.

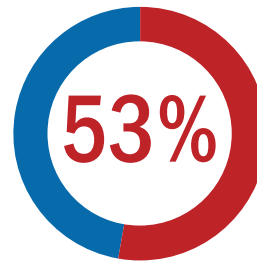
In 2009, the John S. and James L. Knight Foundation awarded a \$719,500 grant to ProPublica to create a public, easily searchable index of original source documents on the Web.

JOURNALISM, NEWS, AND INFORMATION: A CLOSER LOOK, 2009–2011

SUBJECT	2009	2010	2011	2009–2011
Advocacy journalism	1,062,500	4,026,600	2,256,000	7,345,100
Citizen journalism	1,110,000	1,355,522	2,208,025	4,673,547
Constituency journalism	1,823,300	1,753,000	3,694,053	7,270,353
Investigative journalism	6,605,008	11,480,674	9,812,498	27,898,180
Journalism education and training	44,797,099	22,925,822	78,654,185	146,377,106
Journalism, news, and information, general	126,758,151	107,873,920	99,115,987	333,748,058
Total Journalism, news, and information	\$182,156,058	\$149,415,538	\$195,740,748	\$527,312,344



Percentage of total grant dollars awarded by the top 10 journalism, news, and information funders



Percentage of total grant dollars received by the top 10 journalism, news, and information funders

TOP 10 JOURNALISM FUNDERS, 2009–2011

The Freedom Forum, Inc.*	\$121.5 M
Annenberg Foundation	\$55.5 M
Donald W. Reynolds Foundation	\$43.1 M
John S. and James L. Knight Foundation	\$41.5 M
Lilly Endowment Inc.	\$19.2 M
Ford Foundation	\$14.3 M
The John D. and Catherine T. MacArthur Foundation	\$13.7 M
Lumina Foundation	\$11.9 M
Robert R. McCormick Foundation	\$11.6 M
The California Endowment	\$10.9 M

TOP 10 JOURNALISM RECIPIENTS, 2009–2011

Newseum	\$122.7 M
University of Southern California	\$61.7 M
THIRTEEN	\$21.6 M
University of Missouri	\$20.1 M
University of Nevada Reno Foundation	\$12.3 M
National Public Radio	\$9.9 M
Center for Public Integrity	\$8.0 M
Center for Investigative Reporting	\$7.4 M
Northwestern University	\$7.0 M
International Center for Journalists	\$6.5 M

* 95 percent of funding went to support the Newseum.

Some large media organizations may not appear on this list if significant proportions of their funding came from individuals or public charities. This study focuses specifically on the giving of private and community foundations.



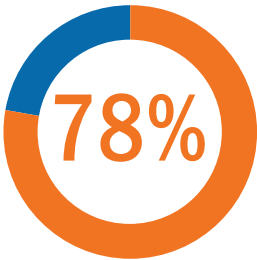
Media Access and Policy: A Closer Look

Overall, the share of grant dollars and activity related to media access and policy increased over time (40.6 percent increase from 2009 to 2011), with dollars associated with intellectual property activity experiencing the largest increase (1,151.8 percent increase from 2009 to 2011) and school and public library media center activities experiencing the largest decrease (75.4 percent decrease from 2009 to 2011).

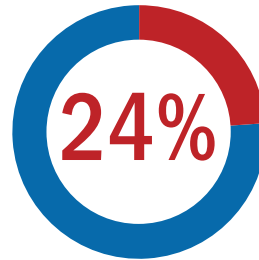
In 2011, the Open Society Institute made a \$900,000 grant to the New Orleans Coalition on Open Governance to promote community engagement in civic discussions and decisions and to increase access to public data and information.

MEDIA ACCESS AND POLICY: A CLOSER LOOK, 2009–2011

SUBJECT	2009	2010	2011	2009–2011
Freedom of expression/First amendment	1,818,000	1,070,000	960,000	3,848,000
Intellectual property	623,500	44,655	7,804,945	8,473,100
Media access and policy, general	2,059,300	5,385,395	12,910,013	20,354,708
Media democracy	7,699,151	5,563,991	7,194,600	20,457,742
Media justice	4,657,922	7,661,200	11,206,938	23,526,060
Media literacy	934,350	7,549,168	4,790,239	13,273,757
Open government	3,130,000	2,836,136	3,271,479	9,237,615
School and public library media centers	16,126,862	15,462,976	3,970,082	35,559,920
Total Media access and policy	\$37,049,085	\$45,573,521	\$52,108,296	\$134,730,902



Percentage of total grant dollars awarded by the top 10 media access and policy funders



Percentage of total grant dollars received by the top 10 media access and policy recipients

TOP 10 MEDIA ACCESS AND POLICY FUNDERS, 2009–2011

Bill & Melinda Gates Foundation	\$39.1 M
Ford Foundation	\$23.6 M
John S. and James L. Knight Foundation	\$18.2 M
The John D. and Catherine T. MacArthur Foundation	\$5.8 M
Alfred P. Sloan Foundation	\$4.5 M
Foundation to Promote Open Society	\$4.2 M
The Andrew W. Mellon Foundation	\$2.8 M
The Comcast Foundation	\$2.7 M
The William and Flora Hewlett Foundation	\$2.6 M
Open Society Institute	\$2.1 M

TOP 10 MEDIA ACCESS AND POLICY RECIPIENTS, 2009–2011

Creative Commons	\$7.8 M
Queens University of Charlotte	\$5.8 M
American Library Association	\$3.7 M
Free Press	\$2.6 M
Proteus Fund	\$2.5 M
Indiana University	\$2.4 M
Chicago Public Library Foundation	\$2.0 M
National Freedom of Information Coalition	\$2.0 M
Electronic Frontier Foundation	\$2.0 M
Online Computer Library Center	\$1.9 M

Some large media organizations may not appear on this list if significant proportions of their funding came from individuals or public charities. This study focuses specifically on the giving of private and community foundations.



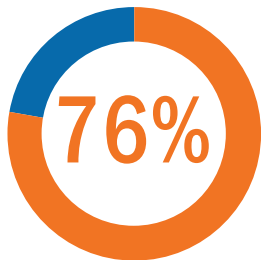
Media Applications and Tools: A Closer Look

Overall, the share of grant dollars and activity related to media applications and tools increased over time (107.8 percent increase from 2009 to 2011), with dollars associated with interactive games experiencing the largest increase (162.2 percent increase from 2009 to 2011) and media applications and tools, general activity experiencing the smallest increase (92.5 percent increase from 2009 to 2011).

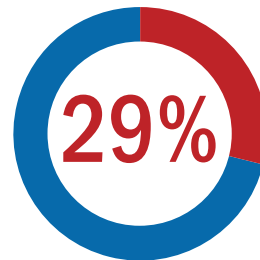
In 2010, the Bill & Melinda Gates Foundation gave a \$2.37 million grant to Indiana University to support Quest Atlantis, an online, 3-D multiplayer game to promote learning.

MEDIA APPLICATIONS AND TOOLS: A CLOSER LOOK, 2009–2011

SUBJECT	2009	2010	2011	2009–2011
Geographic information systems	5,088,224	6,903,697	10,472,992	22,464,913
Interactive games	4,040,759	11,015,220	10,595,750	25,651,729
Media applications and tools, general	13,741,579	20,421,557	26,452,145	60,615,281
Total Media applications and tools	\$22,870,562	\$38,340,474	\$47,520,887	\$108,731,923



Percentage of total grant dollars awarded by the top 10 media applications and tools funders



Percentage of total grant dollars received by the top 10 media applications and tools recipients

TOP 10 MEDIA APPLICATIONS AND TOOLS FUNDERS, 2009–2011

John S. and James L. Knight Foundation	\$23.2 M
Bill & Melinda Gates Foundation	\$20.8 M
Gordon and Betty Moore Foundation	\$12.1 M
The Robert Wood Johnson Foundation	\$6.8 M
W.K. Kellogg Foundation	\$6.0 M
Alfred P. Sloan Foundation	\$4.0 M
The John D. and Catherine T. MacArthur Foundation	\$3.6 M
Ford Foundation	\$2.6 M
The Andrew W. Mellon Foundation	\$1.9 M
Houston Endowment Inc.	\$1.2 M

TOP 10 MEDIA APPLICATIONS AND TOOLS RECIPIENTS, 2009–2011

University of Washington	\$4.8 M
Massachusetts Institute of Technology	\$3.8 M
California Institute of Technology	\$3.5 M
Tides Center	\$3.5 M
New Schools Fund	\$3.0 M
Indiana University	\$3.0 M
Institute of Play	\$2.6 M
Michigan Association of United Ways	\$2.6 M
Public Radio Exchange	\$2.5 M
University of Wisconsin	\$2.5 M

Some large media organizations may not appear on this list if significant proportions of their funding came from individuals or public charities. This study focuses specifically on the giving of private and community foundations.



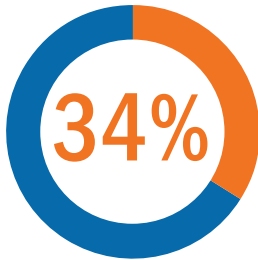
Media Platforms: A Closer Look

Overall, the share of grant dollars and activity related to media platforms increased over time (23.2 percent increase from 2009 to 2011), with dollars associated with mobile media activity experiencing the largest increase (186.6 percent increase from 2009 to 2011) and film/video activities experiencing the largest decrease (21.1 percent decrease from 2009 to 2011).

In 2011, the PNC Foundation made a \$3.25 million grant to support Sesame Workshop's Math is Everywhere program.

MEDIA PLATFORMS: A CLOSER LOOK, 2009-2011

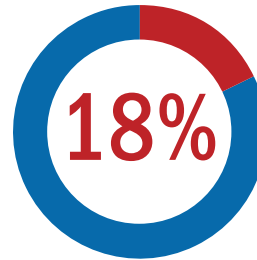
SUBJECT	2009	2010	2011	2009-2011
Audio	2,509,039	2,641,277	2,011,307	7,161,623
Film/video	57,911,222	75,063,649	45,713,105	178,687,976
Media platforms	75,569,284	83,171,358	68,449,070	227,189,712
Mobile media	881,522	3,205,060	2,526,622	6,613,204
Print	13,315,310	25,177,246	22,510,137	61,002,693
Radio	27,044,064	26,531,278	30,839,478	84,414,820
Television	44,447,362	44,592,916	59,557,728	148,598,006
Web-based media	77,978,735	89,861,141	137,588,164	305,428,040
Total Media platforms	\$299,656,538	\$350,243,925	\$369,195,611	\$1,019,096,074



Percentage of total grant dollars awarded by the top 10 media platforms funders

TOP 10 MEDIA PLATFORMS FUNDERS, 2009-2011

The John D. and Catherine T. MacArthur Foundation	\$58.9 M
Bill & Melinda Gates Foundation	\$56.9 M
Lucasfilm Foundation	\$51.0 M
The Andrew W. Mellon Foundation	\$47.9 M
Ford Foundation	\$30.8 M
Alfred P. Sloan Foundation	\$29.7 M
The William and Flora Hewlett Foundation	\$20.0 M
Annenberg Foundation	\$18.3 M
Omidyar Network Fund, Inc.	\$17.0 M
The Robert Wood Johnson Foundation	\$13.9 M



Percentage of total grant dollars received by the top 10 media platforms recipients

TOP 10 MEDIA PLATFORMS RECIPIENTS, 2009-2011

University of Southern California	\$52.5 M
WGBH Educational Foundation	\$22.2 M
THIRTEEN	\$19.9 M
National Public Radio	\$16.3 M
WETA-Greater Washington Educational Telecommunications Association	\$15.7 M
University of California	\$14.1 M
Sesame Workshop	\$11.4 M
Harpers Magazine Foundation	\$9.4 M
Foundation for a Better Life	\$9.3 M
Sunlight Foundation	\$9.3 M

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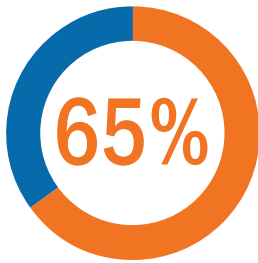
Telecommunications Infrastructure: A Closer Look

Overall, the share of grant dollars and activity related to telecommunications infrastructure decreased over time (48 percent decrease from 2009 to 2011), with dollars associated with telecommunications infrastructure, general activity experiencing the largest increase (29 percent increase from 2009 to 2011) and Internet access activities experiencing the largest decrease (69.2 percent decrease from 2009 to 2011).

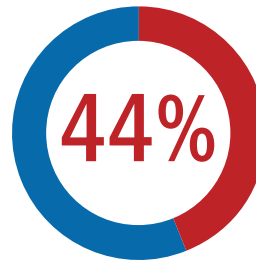
In 2009, the Ford Foundation made a \$200,000 grant to the Bay Area Video Coalition to support the National Public Lightpath, a high-speed network for media connectivity and collaboration in the public interest.

TELECOMMUNICATIONS INFRASTRUCTURE: A CLOSER LOOK, 2009-2011

SUBJECT	2009	2010	2011	2009-2011
Internet access	12,587,540	5,597,180	3,881,126	22,065,846
Internet and broadband	2,693,332	2,943,759	1,176,693	6,813,784
Telecommunications	4,250,987	7,432,959	4,828,576	16,512,522
Telecommunications infrastructure, general	250,000	200,000	322,424	772,424
Total Telecommunications infrastructure	\$19,781,859	\$16,173,898	\$10,208,819	\$46,164,576



Percentage of total grant dollars awarded by the top 10 telecommunications infrastructure funders



Percentage of total grant dollars received by the top 10 telecommunications infrastructure recipients

TOP 10 TELECOMMUNICATIONS INFRASTRUCTURE FUNDERS, 2009-2011

John S. and James L. Knight Foundation	\$10.5 M
The Duke Endowment	\$5.4 M
The Wal-Mart Foundation, Inc.	\$4.5 M
The Robert Wood Johnson Foundation	\$1.8 M
The Comcast Foundation	\$1.7 M
Silicon Valley Community Foundation	\$1.7 M
Cisco Systems Foundation	\$1.6 M
Claws Foundation	\$1.0 M
Bill & Melinda Gates Foundation	\$0.8 M
Kate B. Reynolds Charitable Trust	\$0.8 M

TOP 10 TELECOMMUNICATIONS INFRASTRUCTURE RECIPIENTS, 2009-2011

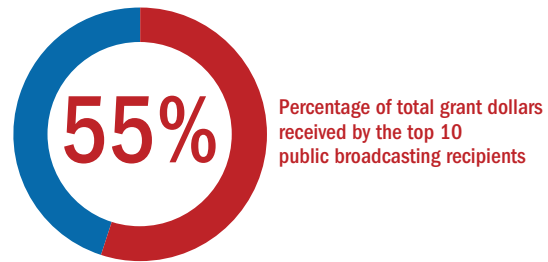
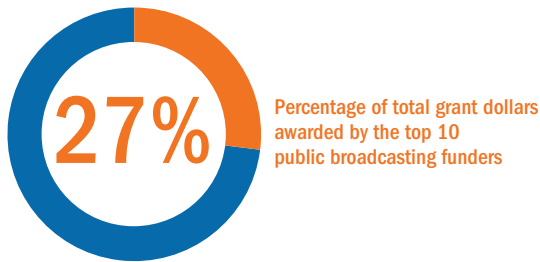
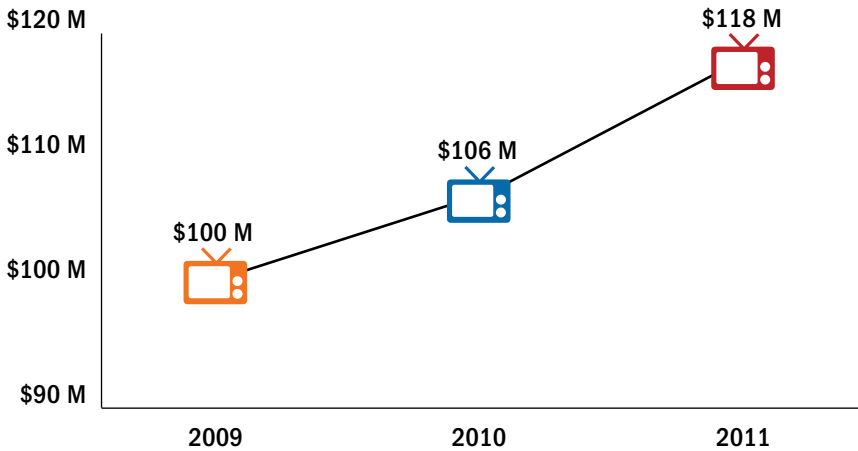
One Economy Corporation	\$7.1 M
OneCommunity	\$3.8 M
South Carolina Department of Mental Health	\$2.5 M
Community Voice Mail National Office	\$1.3 M
University Corporation	\$1.2 M
Kids Connect Charitable Fund	\$1.0 M
Miami-Dade Broadband Coalition	\$1.0 M
Medical University of South Carolina Foundation	\$0.9 M
Community Telecommunications Network	\$0.8 M
Public Library of Charlotte and Mecklenburg County	\$0.8 M

Some large media organizations may not appear on this list if significant proportions of their funding came from individuals or public charities. This study focuses specifically on the giving of private and community foundations.

Public Broadcasting

For this set of analyses, we examined all grants awarded to television and radio organizations that were either nonprofits or government-related. Funding for public broadcasting continued to grow year to year, although the growth was slower than funding for media-related activities overall (17.6 percent vs. 21 percent increase from 2009 to 2011, respectively).

PUBLIC BROADCASTING FUNDING, 2009-2011



TOP 10 PUBLIC BROADCASTING FUNDERS, 2009-2011

Lilly Endowment Inc.	\$15.6 M
Alfred P. Sloan Foundation	\$13.5 M
Margaret A. Cargill Foundation	\$9.9 M
The John D. and Catherine T. MacArthur Foundation	\$8.3 M
Ford Foundation	\$7.9 M
Annenberg Foundation	\$7.3 M
John S. and James L. Knight Foundation	\$6.7 M
The Kendeda Fund	\$6.6 M
The PNC Foundation	\$5.9 M
Richard King Mellon Foundation	\$5.8 M

TOP 10 PUBLIC BROADCASTING RECIPIENTS, 2009-2011

THIRTEEN	\$41.5 M
National Public Radio	\$26.7 M
WGBH Educational Foundation	\$26.5 M
WETA-Greater Washington Educational Telecommunications Association	\$21.9 M
Minnesota Public Radio	\$13.1 M
Sesame Workshop	\$12.4 M
WNYC Radio	\$10.6 M
KCET Community Television of Southern California	\$8.7 M
KTCA/KTCI Twin Cities Public Television	\$8.5 M
KQED	\$6.3 M

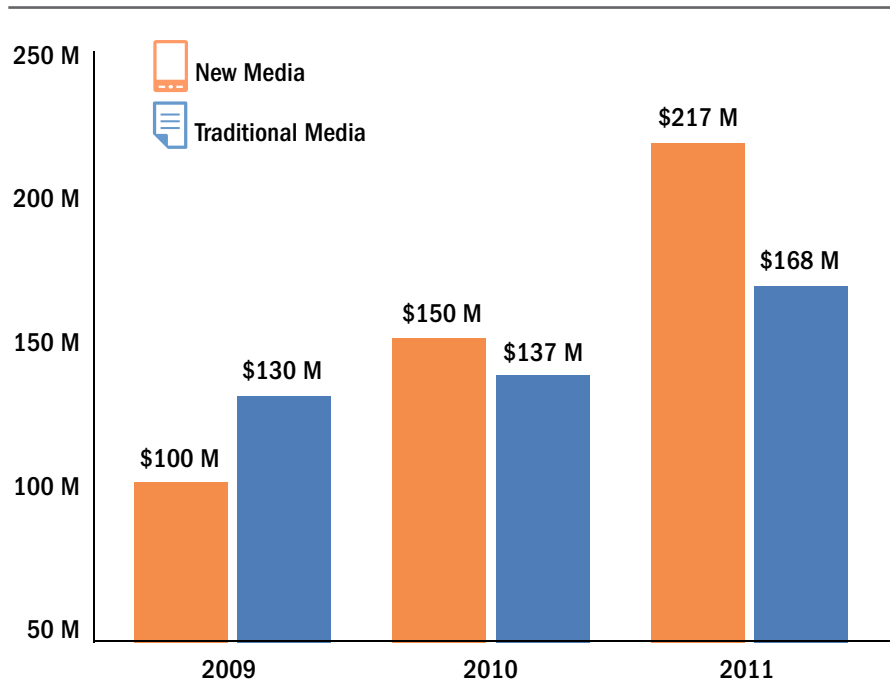
Some large media organizations may not appear on this list if significant proportions of their funding came from individuals or public charities. This study focuses specifically on the giving of private and community foundations.

New Media/Traditional Media

For these analyses, we examined the level of funding that foundations provided to support new media vs. traditional media. In new media, we included grants supporting Web-based and/or mobile activities. For traditional media, we included grants that supported television, print, and/or radio. We excluded grants that included both new and traditional media activity (2.8 percent of grants).

Funding for traditional media continued to increase from 2009 to 2011, despite the explosion of new media. This increase, however, was dwarfed by the increase in funding for new media. From 2009 to 2011, the increase in total grant dollars for new media was four times greater than the increase in funding for traditional media (116.5 vs. 29.4 percent increase, respectively).

NEW MEDIA VS TRADITIONAL MEDIA, 2009–2011



Increase in new media funding was **FOUR TIMES** greater than funding for traditional media.

ENDNOTES:

- 1 Waldman, S. and the Working Group on Information Needs of Communities, Federal Communications Commission, The Information Needs of Communities: The Changing Media Landscape in a Broadband Age, http://transition.fcc.gov/osp/inc-report/The_Information_Needs_of_Communities.pdf, accessed on September 4, 2013.
- 2 Miller, C., L. Rainie, K. Purcell, A. Mitchell, T. Rosensteil. How People get Local News and Information in Different Communities, Pew Internet & American Life Project, September 26, 2012, http://www.pewinternet.org/~media/Files/Reports/2012/PIP_Local_News_Community_Types.pdf, accessed September 4, 2013.
- 3 Brenner, J. & A. Smith. 72% of Online Adults are Social Networking Site Users, Pew Internet & American Life Project, August 5, 2013, <http://pewinternet.org/Reports/2013/social-networking-sites.aspx>, accessed September 4, 2013.
- 4 Zickuhr, K. & R. Smith. Home Broadband 2013. Pew Internet & American Life Project, August 26, 2013, <http://www.pewinternet.org/Reports/2013/Broadband.aspx>, accessed on September 4, 2013.
- 5 Waldman, S. and the Working Group on Information Needs of Communities, Federal Communications Commission, The Information Needs of Communities: The Changing Media Landscape in a Broadband Age, http://transition.fcc.gov/osp/inc-report/The_Information_Needs_of_Communities.pdf, accessed on September 4, 2013.
- 6 FSG. State of Funding in Information and Media among Community and Place-based Foundations, February 2012, <http://www.knightfoundation.org/publications/state-funding-information-and-media-feb-2012>, accessed September 4, 2013.
- 7 Kaufman, P.B. & M. Albon. Funding Media, Strengthening Democracy: Grantmaking for the 21st Century, 2010, <http://intelligenttelevision.com/journal/entry/funding-media-strengthening-democracy>, accessed September 4, 2013.
- 8 Foundation Center. Key Facts on U.S. Foundations, October 1, 2013, <http://foundationcenter.org/gainknowledge/research/keyfacts2013/>.

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Established in 1956, the Foundation Center is the leading source of information about philanthropy worldwide. Through data, analysis, and training, it connects people who want to change the world to the resources they need to succeed. The Center maintains the most comprehensive database on U.S. and, increasingly, global grantmakers and their grants—a robust, accessible knowledge bank for the sector. It also operates research, education, and training programs designed to advance knowledge of philanthropy at every level. Thousands of people visit the Center's web site each day and are served in its five regional library/learning centers and its network of more than 470 funding information centers located in public libraries, community foundations, and educational institutions nationwide and around the world.

For more information about this report contact Brenda Henry-Sanchez, director of research for special projects, at bhs@foundationcenter.org.

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