
Public Radio in the New Network Age Wider Use, Deeper Value, Compelling Change

DRAFT RECOMMENDATIONS FROM THE
PUBLIC RADIO AUDIENCE GROWTH TASK FORCE
FOR DISCUSSION AND COMMENT

grow the **audience**
for public radio



Updated May 8, 2009

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Public Radio in the New Network Age

PUBLIC RADIO IN THE NEW NETWORK AGE is the report of findings and recommendations from GROW THE AUDIENCE, a broad-based effort to shape shared strategies, compelling goals, and results-oriented plans that will widen the use and deepen the value of public radio. The project was initiated and funded by the Corporation for Public Broadcasting.

The Station Resource Group, a membership organization of leading public radio stations that focuses on strategy, analysis, policy, and innovation is leading the GROW THE AUDIENCE initiative.

PUBLIC RADIO IN THE NEW NETWORK AGE was published in early May 2009 as a draft for discussion and comment by individuals throughout public radio and by supporters from outside the field. A final project report will be published in June.

Additional project materials on which this report is based, including research reports, essays, and audience growth resources can be found at the GROW THE AUDIENCE project website www.srg.org/GTA

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Preface

"We need a big idea, a vision, a coalescing imperative . . . something aspirational." *Jon McTaggart, Executive Vice President & COO, American Public Media*

"Public radio is ready for the next big idea." *Laura Walker, President and CEO, WNYC New York Public Radio*

GROW THE AUDIENCE has two broad objectives. First, we seek to re-focus public radio's attention on public service fundamentals – clear purpose, wider use, and deeper value. Second, we are applying those fundamentals to shape a motivating, forward-looking plan for an unfolding network age. Our aim is to address both local and national activities, to speak to stations that present different formats and serve different kinds of communities, and to include the range of channels and platforms through which public radio can engage with its audience.

PUBLIC RADIO IN THE NEW NETWORK AGE draws on widely shared ambitions for a much greater place for public radio in the public service media environment over the next decade and a strong, almost impatient, sense that public radio is ready to move to a new level of service.

Here is some of what we've said and heard:

"Public radio is about linking notions of education and learning with a populist sense of inclusiveness and accessibility." *Andrea Taylor, Director of North American Community Affairs, Microsoft*

"Take risks, be the home for more tough investigative work without fear or favor or second guessing what critics might say." *Bill Buzenberg, Executive Director, Center for Public Integrity*

"It makes good business and social sense to be more inclusive of people of color. For example, the Hispanic population in the US, 41 million, is greater than the total population of Canada. By 2010, US Hispanics will be the second largest Hispanic population in the world after Mexico." *Frank Cruz, President, Cruz & Associates*

"The real opportunity may be with the age demographics that don't use public radio now – younger listeners. This is a generation interested in participatory media – more inclined to be involved in social interaction, but also about information. Bringing that energy and that demographic into public radio would be huge." *Orlando Bagwell, Director of Media, Arts and Culture, Ford Foundation*

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“Outreach and engagement with the community, connections and social networking around news, and partnerships with community organizations. Deeper research in individual markets, perceptual studies, music research, exploration of target audiences, web intelligence, and exploration of cultural barriers to public radio use. New channels for multiple formats in every major market, more platforms for more formats, and more frequencies and bandwidth generally.” From the PRPD Program Directors Round Table Recommendations to GROW THE AUDIENCE.

“Public Radio is aiming too low and aspiring to too little. You are the program producers, the dream-makers. What Spielberg is to movies you are to audio. Can even the mighty Google match your ability to move your audience to any destination that interests them, online, on-air, or off? Not on your life.” *Mark Ramsey, President, Radio Intelligence*

“Something else needs to drive the next stage. We cannot forget the hunger to make our world better . . . the yearning for a society that is more fair.” *Jo Anne Wallace, Vice President and Radio General Manager, KQED Public Media for Northern California*

“We cannot satisfy ourselves with past successes. We must throw open the doors.” Bruce Theriault, Senior Vice President, Radio, Corporation for Public Broadcasting

Over the next decade, public radio aspires to:

Take audiences deeper and further in their pursuit of learning, information, inspiration, and entertainment; in their enjoyment of arts and cultural experiences; in their desire for understanding, challenge, and personal growth; and in their commitment to improve their communities.

Enlarge its position in journalism through grounded, fact-based reporting – global, national, and local – at a time when journalism elsewhere is in decline and at risk.

Lead a genuinely democratic, authentically American conversation in a chaotic, crisis-afflicted world – engaging communities and audiences of diverse character with new content and new approaches.

Expand its role in American music through strengthening its services, making new commitments to contemporary work and emerging artists, and enlarging the pathways music programming already opens to diverse cultures and audiences.

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Introduction

Public radio's strong strategic position is anchored in trusted content of quality, depth, and authenticity, close connections to local communities, and the leverage and scale of multiple national networks. Powerful programming at the highest levels of journalism and rich cultural fare carry forward traditions of quality and innovation, civil dialogue, a global and inclusive worldview, and respect for the intelligence and sensibilities of those we serve.

The reach and use of public radio is significant and growing. Twenty-nine million Americans use public radio each week, over 1.7 million at an average moment through the day.

As we look ahead to the second decade of the 21st Century, we are well into a new network age in which content flows across multiple, interconnected platforms and channels, regulatory and capital barriers to entry erode, and individuals assert their increasing capacities to choose, control, engage with, and create their media experiences. Many media organizations are struggling through this evolution. The dire prospects of many American newspapers and the unhappy circumstances of the recorded music industry are leading examples of deeply challenged incumbent media. The billions of dollars in venture capital burned through by failed new media start-ups testify to the difficulty of "getting it right."

Public radio has extraordinary opportunity in the new network age to make its great content more broadly and easily accessible. Its strategic position translates well in the unfolding environment. It can build on decades of experience with ubiquitous and portable access, a highly-segmented, niche-oriented marketplace, and relatively low costs of content creation and experimentation.

An ambitious path forward for public radio must center on the enduring, powerful role of broadcasting well into the future, and the significant, still-unrealized broadcast opportunities that public radio can seize in so many communities. Just as surely, public radio must fully embrace the Internet and other networked communications as a primary means of distribution, connection with audiences, and broadening of content sources. **A public radio portfolio strategy** of meaningful content through both broadcast and networked communications will reach millions more people, connect more deeply with their civic, cultural, and social lives, and enable them to connect more closely with one another as they make decisions about their families, their communities, and the nation.

Summary of Recommendations

We recommend that public radio – stations, networks, producers, and partner organizations – adopt ambitious, collective goals to increase public radio’s reach, use, and inclusiveness by significant measures. We propose:

- **Double the number of people who use public radio every week – on-air, online, and through other platforms.**
- **Increase the average audience – the number of people using public radio at any given moment – to half again as large as it is today.**
- **Triple the amount of listening by people of color.**

Our plan for audience growth is based on eight broad strategies and additional measures that advance them.

1 Inclusiveness

Deepen the value of public radio for all its audiences by strengthening the diversity of voices and views in public radio’s news and music, by encouraging multiple, differentiated services that reach a wider range of listeners, and by making continued investments in stations and programming developed and controlled by people of color.

We challenge public radio to commit to a greater inclusiveness of people of color in every dimension – the governance of stations and national organizations, the hiring of management and programming staff, and the voices, views, stories, and music of day-to-day programming.

Public radio will deepen its value to current listeners and increase its accessibility to millions of listeners now at the edge of its audience by increasing the inclusiveness of its work and the authenticity of the voices, views, and cultures it presents.

We recommend a focused and collaborative initiative to increase the accessibility of public radio’s major formats to people of color through institution-changing, appeal-shifting efforts by committed and ready stations with the largest audiences in markets with the largest populations of African-Americans and Latinos and similar efforts by national producers to increase their service and value to people of color.

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This initiative should include managed, multi-year projects that involve learning, change, and mutual accountability.

We recommend investments in program innovation at both the local and national level – prototyping, testing, and developing programs and formats that explore different styles and sensibilities with the aim of greater appeal to audiences of color. This effort must be mindful that race and ethnicity are limited tools in programming development and give close attention to the values, lifestyles, and interests that will define the programming and those who respond to it.

We recommend wider availability of public radio’s current principal formats of news, classical music, jazz, and AAA – each with its distinctive audience appeal – and experimentation with other formats and services that might hold a greater appeal for people of color or other new audiences. By pursuing multiple public radio services in as many markets as can support them – and meaningful differentiation of the services offered by each of them – public radio will increase the diversity of the audience it reaches.

We recommend continued strong support for public radio stations that are developed and controlled by people of color, stations that have demonstrably advanced listening by people of color. Such support should include pursuing opportunities for licensing of additional broadcast spectrum, station acquisitions, and public service management agreements that will increase the number of these stations. It is also important to develop clearer expectations of audience performance for public radio’s stations controlled by people of color, based on format, market factors, and sustainable resources.

2 Journalism

Make public radio America’s most trusted and one of its most widely-used sources of daily journalism by strengthening the power and scope of its most listened-to national news programs, investing in program innovation that will lead to more choice and service for listeners, and supporting significant growth in the scale, quality, and impact of local reporting.

Claiming a significantly larger role in American journalism requires a much more robust news gathering capacity – more “feet on the street” with notebooks, recorders, and cameras and more editors and producers to shape their work. The distance between current reality and the role we imagine – and that others urge upon public radio – is large. Public radio must also think carefully and collectively about the character of the journalistic franchise it seeks: it cannot simply take up roles, beats, and topics as they are left behind by others, but it must think considerably beyond current work. We should proceed in an audience-centered fashion, beginning with the interests and needs of those who already respond strongly to public radio news and information programming and building to a larger audience of news users.

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2.1 Journalism: National Programs

Strengthen public radio's signature national news programs that generate the largest amount of listening for the system as a whole, the most listening for the stations that carry them, and a greater listener loyalty.

A short list of new and information programs have a dramatic impact on the number of listeners and amount of listening to public radio. NPR's *Morning Edition* and *All Things Considered* top this list, which also includes *Fresh Air*, *Talk of the Nation*, *Weekend Edition*, *Marketplace*, *The Diane Rehm Show*, and *The World*. Key steps include:

- Assure continuing management focus and budget priority, both nationally and locally, on the core programming assets of the public radio news franchise.
- Monitor the changing information environment in which public radio's signature news programming competes for attention and the changing information needs of the listeners they seek to serve.
- Commit to much more communication and coordination on an ongoing basis between senior national program executives and station leaders in programming and news.

We recommend increasing reporting from across the nation within national programs, beginning with careful consideration of contending views for how to achieve this goal.

We recommend increasing public radio's now-limited investment in enterprise and investigative reporting, building on efforts already in place at NPR News and American Public Media and eventually extending to other national producers and leading local news stations.

We recommend investing in new national news and information programming that will give stations meaningful choices for differentiating their news services and give more listeners a news choice that meets their interests and needs on-air and online.

2.2 Journalism: Local Reporting

Public radio must develop greater scale and higher quality in local and regional reporting to realize the impact and significance to which many stations aspire.

We recommend increasing local broadcast and online reporting at a dozen or more stations with high audience service potential through significant investments that increase the number of news staff, enhance on-air and online news production capacity, develop skills for reporting and content management in a digital age, and foster innovative approaches to community connections.

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In addition to these highly-targeted investments, we recommend initiatives for other stations that have made substantial local reporting commitments that will increase their capacity to create and present regular, high-quality journalism at a level consistent with the scale and resources of their organizations and communities.

We recommend support for collaborative projects that advance shared use of local station reporting on a regional and topical basis and investments in shared resources such as editors for broadcast and online content. Such efforts should have a clear focus on wider use of content, cost reduction, or both.

We recommend partnerships and collaborations that look outside public radio to other content-creating organizations and community resources, and development of a recommended editorial framework to preserve the trusted position and integrity of public radio in this more inclusive and multi-dimensional environment.

2.3 Journalism: Integrated Online News

Create an integrated online news presence for diverse public media sources – international, national and local – that extends current capacities and brands, leverages current editorial assets and adds or creates new ones, and that might include the distinctive strengths and separate assets of public television and online public service media organizations.

We recommend that public radio and other public media partners move as quickly and as far as possible through a sequence of non-mutually-exclusive steps to build public media’s capacity in this territory.

Collaboration behind the curtain. Enhance the productivity and impact of public media’s online journalism through collaborative measures such as coordinated backend systems, APIs, standards, tools and shared investments in activities such as federated search and search engine optimization (SEO).

Aggregation of public media journalism. Much as NBC and Fox created Hulu as a single online vehicle to distribute their respective sitcoms and related material, public media should create an online public media journalism destination that presents work from multiple sources, showcasing collective efforts in a way that both stands on its own and leads back to the respective reporting and producing entities.

This function could be advanced through a single, high visibility site that would give the online user an integrated yet varied experience, much as the many local versions of *Morning Edition* are perceived by radio listeners. Or material could be organized in content verticals that would match broad, well-known areas of audience interest.

Aggregation plus curation. Hulu now includes content from dozens of sources beyond its two founders. Similarly, an integrated public media journalism effort could grow to include curated content

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from other sources, ranging from conventional journalism partners to online-only journalism initiatives to various citizen journalists and other kinds of user-generated content.

Content collaboration. Public broadcasters have periodically collaborated on content creation with limited success. Improve the impact by working toward larger scale, stronger commitment of reporting resources to the collaborative endeavor, and greater investment in the “collaborative tissue” that organizes and focuses the work.

A new or expanded journalistic entity whose mission would be web-first but would feed to broadcast platforms. This entity would be organized and focused principally on online content, creating text, images, audio, and video in a fashion that draws on the values, strengths, and brands of public broadcasting but works to a tone and sensibility that is “native” to the networked space. In a turn-about of current practice in which broadcast material is often “exported” to the web, this entity would feed its online work back into the on-air realm.

The output of the entity could take several forms, from a single destination or portal-type site to multiple, content-focused sites. Similarly, the focus could be principally on a national identity or on integration with local efforts that would give users a geographically-customized experience.

3 Music

Build public radio’s music services through better integrating music into public radio’s service vision, adding music stations through acquisitions and operating agreements, stronger performance, a strengthened position in the networked space, and innovation in presentation and new genres.

Music programming is a significant part of public radio’s overall audience service – about one out of every three hours of listening – and warrants a higher profile in public radio’s vision and goals.

We recommend a concerted effort to increase the number of markets in which stations offer public radio’s strongest music franchises – classical music, jazz, and AAA – on a consistent basis. This can be achieved through a combination of self-directed change and focusing at current public radio stations and adding or changing the control and direction of stations through acquisitions, mergers, and management agreements.

We recommend continued development of public radio music services – both core genres and special niches – in the networked environment of online and mobile devices and the development of an organized approach to music rights issues in this space.

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We recommend that stations and producers experiment with how public radio organizes and presents music within its current genres and think outside the familiar genres to other music possibilities that might fit within the broader public radio domain.

4 The Network

Use ubiquitous networked digital media to follow current public radio listeners in their changing patterns of media use, cultivate new users by providing more ways to find and use public radio content, and make public radio more flexible, participatory, and engaging.

We challenge public radio to move with and ahead of its audience to the unfolding platforms of the networked environment, offering current listeners new choices in how to listen to public radio, and finding new listeners and creating new services by exploiting the multiple channels and participatory capacities the lie beyond broadcasting.

In the near term these changes will mostly be about new pathways of distribution for both national producers and local stations. But we encourage public radio at all levels to commit now to a longer-term paradigm shift in how public radio creates and organizes its content, toward new models of engagement and participation that leverage and extend public radio's mission and brands, and reinvention throughout the field of both individual organizations and the relationships among them.

Online strategies for stations. We recommend organized and ongoing support for stations in developing strategic clarity about their roles and expectations in the online and mobile networked environment – at the different levels of resources and operations and different phases of development found across the station community.

Baseline capacity. We recommend development of a baseline capacity and fluency in the networked environment among all content creation and delivery nodes in the public radio system, with particular emphasis on organizations committed to content that will extend the inclusiveness of public radio. This baseline should include mastering website basics, adoption of appropriate “new media” capabilities, promotion strategies, techniques to increase the “findability” of content in the network space, and attention to the opportunities to extend the range of views and voices public radio presents online.

“Web native” content and delivery. We recommend aggressive experimentation and development of public service content and delivery methods explicitly designed for a digital, networked environment.

This includes:

- Investments in content that is “native” to the network space
- Reorganizing content for networked use.
- “Distribute everywhere” techniques that make public radio content available in new ways.

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- Exploration of new mobile platforms
- Development of a rights framework that supports these new approaches to public service.

The natural networks of our audiences. We recommend investments in pilots and demonstrations that exploit the community-building potential of the network to strengthen public radio’s content, “create publics” around issues and interests in communities, and leverage the resources that surround public radio stations, producers, and audiences.

5 Market Strategies, Station Solutions

Improve existing stations and develop new services in the top 50 markets designed to increase the availability of multiple, focused, and differentiated high-performing public radio services.

Seven of the top 50 markets do not have a full-time public radio news station, 16 have neither a public nor commercial classical station, 27 have no full-time public radio jazz, and, depending a little on how one counts, 40 do not have a full-time public AAA station.

We recommend an expansion initiative for a new generation of service – a broad-based, collective effort by stations, networks, and funders – crafting station-specific solutions and making targeted investments in markets where the current level of public radio performance indicates significant opportunities for audience growth. There are three objectives for this initiative:

Deliver the franchises. Increase the number of large markets in which public radio’s core program franchises are available on a consistent basis.

Target the growth opportunities. Highlight markets with large populations but low levels of public radio audience service – below that realized in comparable situations elsewhere – and develop market-specific strategies for audience growth. This will require further analysis to sharpen the understanding of which markets present the most important opportunities for audience growth.

Create room to innovate. Increase the number of stations that present services to “new” listeners that we have targeted for audience growth.

Top 25 Markets. We recommend three key approaches in the top 25 markets that will strengthen public radio’s performance.

- “Realign” existing stations by significantly improving the way formats are organized and presented across stations.
- Develop new services on existing public radio stations.
- Create opportunities for new services by either gaining control of stations through acquisitions or operating agreements, or by upgrading underdeveloped signals.

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In markets 26-50, we recommend an emphasis on:

- Better performance by the two top-ranked public radio stations.
- Upgrade or add new stations to achieve more stations with full market coverage.

Analysis. We recommend market-by-market analysis that extends GROW THE AUDIENCE’s market and format-specific work, incorporating additional variables, particularly values and lifestyle indicators such as SRI’s VALS system, to sharpen the understanding of which markets present the most important opportunities for audience growth.

These measures require substantial investments in **acquisitions, careful negotiation of operating agreements, or other arrangements** that reorganize station control – all with close attention to costs and risk factors. We observe that these kinds of station transactions are responsible for as much as 20 percent or more of all growth in public radio listening since 2001.

6 Marketing

Develop listener-centered marketing principles and practices within public radio in which stations engage with listeners throughout the planning, design, development, and presentation of programming and services.

We recommend that public radio at all levels give greater emphasis to overall strategy and implement marketing principles and practices that stem from that strategic direction. The strategic direction, in turn, must be inclusive of the needs, wants, and attitudes of those demographic groups that are essential to growing the audience beyond current constituencies, such as African-Americans, Latinos and younger listeners. This should be a multi-organizational, multi-year effort to build public radio’s marketing expertise and activities.

Public radio’s marketing effort should extend across all professional disciplines and encompass work by all national organizations serving public radio. Key elements in developing this work include:

- Create opportunities for stations to access strategic planning and marketing planning expertise.
- Help station leaders incorporate marketing principles and practices into their strategic planning and operations.
- Define a framework through which stations can take advantage of these turbulent times by responding to the needs of their current audiences and emerging audiences.

We recommend that DEI, PRPD, and public radio’s networks support stations’ marketing efforts with strong tactical ideas and accessible, practical, scalable resources, training and tools that encourage best practices. This work should begin with development of a shared sensibility regarding marketing

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principles, definitions, and purposes. Activities should meet stations “where they are” with respect to resources and staffing and help stations assess their needs and effectively engage outside expertise.

We further recommend two specific initiatives that follow on the DEI and PRPD recommendations:

- A collaborative project among DEI and PRPD to develop their respective organizational capacity to conduct training and/or support collaborative efforts at their member stations and to increase their own understanding of how marketing is most effectively integrated into their station support activities.
- A program track in the Public Radio Development and Marketing Conference over the next three years devoted to the concepts, practices, and benchmarks of successful marketing with companion conference sessions conducted at the PRPD annual conference.

7 Support for Stronger Service

Foster more compelling public service by supporting organizational and professional development and research that advances the recommendations of this plan for more inclusive service, differentiation of services within markets, innovation in news and music, and aggressive expansion of activity in the networked space.

Recommendations in this plan turn on concrete and continuing action across an array of organizations, professional disciplines, and activities and will depend upon:

- Coalitions of the committed – those ready to act in meaningful ways.
- Thoughtful segmentation – projects and solutions that are “right sized” to communities, consistent with the character and values of different services, and appropriate to different stages of organizational development.
- An integrated effort – participation across professional disciplines, efforts and investments at both local and national levels, communication, coordination, and collaboration.

Organizational development. We recommend multiple initiatives to strengthen public radio’s organizations. These initiatives should center on stronger governing boards, a strategic sensibility in key decisions, inclusiveness throughout the organization, community engagement, advanced fundraising that includes major giving and philanthropy, and stronger, more effective Inter-organizational relationships that contribute to more streamlined decision-making on important system issues.

Structural issues. Public radio must confront a familiar list of long-term structural issues – too many entities, too little aggregation and scale, and too many licensees with agendas other than public radio.

Professional Development. We recommend initiatives by public radio’s principal professional organizations, networks, and other national organizations that advance skills of the public radio

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workforce directly connected with audience growth, including professional organization meetings with audience growth as a major theme, ongoing peer review of broadcast and internet programming, both within and across stations, and projects that create opportunities for shared learning experiences focused on planning and execution within specific formats and dayparts.

Research. We recommend continuing investments in public radio audience and program research that build on current knowledge, extend themes developed by GROW THE AUDIENCE, and explore areas we have targeted for innovation.

Audience Metrics. Foster development of integrated, cross-platform public media metrics that track both levels of use and behavioral patterns for public radio's programming and services and promote the use and understanding of such metrics throughout the system.

8 Follow-up and Accountability

Establish responsibility and accountability, nationally and locally, for this audience growth plan through a CPB-supported annual review of system progress in addressing the recommendations in this report. The assessment should include perspectives of multiple constituencies, organizations, and individuals and result in a progress report to the public radio system.

We recommend a multi-year follow-up effort that includes:

- Broad endorsement of the goals and recommendations presented here.
- Public radio's national producers, networks, and professional organizations should consider and report to their respective members and affiliates how they intend to integrate elements of GROW THE AUDIENCE recommendations into their priorities, programming, conferences, research activities, and other initiatives.
- Every public radio station should establish an audience service goal and a method for monitoring its own progress on an annual basis. This information should be reported in brief fashion to CPB either through a special survey or as part of the Annual Activities Report.
- Ask CPB, foundations, and agencies that provide significant support to public radio to address how recommendations in this plan will be reflected in their funding priorities and policies.
- Conduct an annual review of progress on the initiatives outlined above using goals and metrics appropriate to the particular activity.
- Report results and updated goals and recommendations to the system on an annual basis.

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Erin Moran, Chief Financial Officer, Public Radio Capital
Rekha Murthy, Director of Projects and Partnerships, PRX
Todd Mundt, Director of New Media Strategies, Louisville Public Media
Davia Nelson, Kitchen Sisters
Steve Nelson, Program Director, MPR Regional News Service, St. Paul
Eric Nuzum, Director of Programming and Acquisitions, National Public Radio
Steve Olson, President, Audience Research Analysis
Tim Olson, Vice President of Digital Media and Education, KQED, San Francisco
Craig Oliver, Consultant
Jim Paluzzi, Vice President, New Media & Technology, Colorado Public Radio
Leslie Peters, Vice President, Knowledge Management, Audience Research Analysis
Robert Peterson, Administrative Manager, KWMU St. Louis
Carol Pierson, President and CEO, National Federation of Community Broadcasters
Skip Pizzi, Media Technology Consultant
Lynne Pollard, Vice President for New Media, Oregon Public Broadcasting
Jeff Ramirez, Vice President for Radio, KERA, Dallas
Raul Ramirez, News and Public Affairs Director, KQED, San Francisco
Mark Ramsey, President hear2.0/Mercury Radio Research
Dana Davis Rehm, Senior Vice President, Marketing, Communications, and External Relations, National Public Radio
Ben Robins, Research Manager, National Public Radio
Wayne Roth, General Manager, KUOW, Seattle
Loretta Rucker, Executive Director, African-American Public Radio Consortium
Jackie Sauter, Program Director, North Country Public Radio, Canton, NY
Bari Scott, SoundVisions Productions

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Sue Schardt, Executive Director, Association of Independents in Radio
Vivian Schiller, President & CEO, National Public Radio
Greg Schnirring, Vice President, Radio, Corporation for Public Broadcasting
John Silliman Dodge, Vice President of Programming, KPBS, Portland
Israel Smith, I.S. Marketing
Margaret Low Smith, Vice President for Programming, National Public Radio
John Sutton, John Sutton & Associates
Joan Swanson, Executive Director, Jazzworks, South Bend
Loris Ann Taylor, Executive Director, Native Public Media,
Bill Thomas, Director of Radio, Prairie Public Broadcasting, Fargo
Limor Tomer, Executive Director, Music Programming, WNYC, New York.
Stewart Vanderwilt, CEO, KUT, Austin
Bruce Warren, Program Director, WXPB, Philadelphia
Carl Watanabe, Station Manager, Capital Public Radio, Sacramento
Dave Wilson, Consumer Electronics Association
Kinsey Wilson, Senior Vice President and General Manager, NPR Digital Media.
Scott Williams Program Director, KJZZ & KBAQ, Phoenix
Chris Worthington, Program Director, MPR Regional News and Information Service

*and over 150 program directors, producers, managers, and network staff who joined together for
GROW THE AUDIENCE round table brainstorming at the 2008 PRPD annual conference*

1. Inclusiveness

Deepen the value of public radio for all its audiences by strengthening the diversity of voices and views in public radio’s news and music, by encouraging multiple, differentiated services that reach a wider range of listeners, and by making continued investments in stations and programming developed and controlled by people of color.

The founding visions of public radio – from antecedents in educational broadcasting and the Pacifica Foundation to the 1967 Public Broadcasting Act and the initial mission statement of National Public Radio – all spoke to pluralism, diversity, and inclusiveness. While there are many dimensions to America’s diversity and pluralism, this section of PUBLIC RADIO IN THE NEW NETWORK AGE focuses on race and ethnicity.

Public radio will deepen its value to current listeners and increase its accessibility to millions of listeners now at the edge of its audience by increasing the inclusiveness of its work and the authenticity of the voices, views, and cultures it presents.

We challenge public radio to commit to a greater inclusiveness of people of color in every dimension – the governance of stations and national organizations, the hiring of management and programming staff, and the voices, views, stories, and music of day-to-pay programming.

Inclusiveness is an expression of public radio core values – reflection of our world and our communities, authentic voices, lifelong learning, idealism. We and our listeners should expect it to be a part of all our work, especially our most important, most listened-to services.

One direction of momentum is toward an inclusiveness of views, voices, and perspectives in all that public radio presents. The Latino Public Radio Consortium’s *Brown Paper* calls for

“ . . . a public media system that includes Latino voices, services and perspectives at every level. The public radio system needs to be bold in creating initiatives that establish opportunities for Latino managers, producers and youth.” *Florence Hernández-Ramos, Project Director, Latino Public Radio Consortium*

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And in a *GROW THE AUDIENCE* essay, Loris Taylor of Native Public Media writes:

“These are exciting times to repurpose our role as media architects for a new America and to redesign our Public Service Media in a way that sounds and looks more like you and me.”

Hernández-Ramos and Taylor speak to inclusion, at least in part, from a perspective of empowerment, and self-realization. Increasingly, though, inclusion is an expectation of the broader audience – it is the reality of how we live our lives.

Veteran public radio news executive Bill Buzenberg, who now heads the Center for Public Integrity, asserts in a *GROW THE AUDIENCE* essay:

“The best way to make sure the audience is as diverse as our nation as a whole is to build that diversity into everything public radio does: into every drive-time program, every program staff, and every story topic; in short, every input and every output. Getting that coverage right—from diverse angles with a diverse on-air and off-air staff—is the best approach. My view is that this can only strengthen the nation and public radio.”

A strategy for diversity *and* audience growth requires close attention to audience needs, behavior, and values, creative use of multiple services and formats, and a willingness to experiment and learn.

A more inclusive and diverse sound to public radio’s programming will lead to a different audience – perhaps in small ways, perhaps in larger ones. But different, that’s pretty much a sure thing. Whether the audience will also grow is a gamble that most of the system leaders with whom we have spoken are prepared to take – although most seem convinced that growth will be a result as well.

Relative to the proportion of African-Americans in the general population, African Americans are only about 80 percent as likely to be found in public radio’s weekly audience. The comparable number for Hispanics is 42 percent. (Source: *Profile 2008*, NPR Audience Insight and Research). Asians are more likely to be in the public radio audience, 11 percent more than their presence in the general population. Data for Native Americans in this study are too limited for reliable statistics.

When *GROW THE AUDIENCE* drilled down to look more closely at the **amount of listening** by different groups and the performance of different formats, the disparities are more significant and the story gets more complicated.

As we look to create a public radio audience that “looks more like America,” it is important to consider the advice we heard from numerous researchers and analysts: that race and ethnicity are limited tools in programming development and that public radio should give close attention to values, lifestyles, and interests as it pursues goals of inclusiveness and diversity.

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Sustain current investments in station operations and programming owned and controlled by people of color. Increase the number of stations controlled by people of color.

Public radio has made significant ongoing investments in station ownership and control by people of color as one strategy to assure a diverse overall service. Loris Taylor of Native Public Media writes passionately in support of “the self determination of our own media destiny as a people.” The *Brown Paper* envisions a public media system “that includes and supports a strong Latino-controlled public media.”

Many of the public radio stations controlled by people of color have limited visibility in the public radio industry. Yet these stations play a larger role than many realize in achieving public radio’s current overall level of diversity. Going forward, leaders from these stations can bring the knowledge and needs of their respective communities to a broader system discussion.

Our recommendations follow the lines of the three broad strategies outlined above:

- Inclusiveness and accessibility in public radio’s news
- Multiple stations with focused and differentiated service
- Ownership and control by people of color

Inclusiveness in Public Radio News

Public radio’s pursuit of greater inclusion must extend to the core of public radio’s identity – beginning with the most successful programs and stations in communities with the largest numbers of people of color. This requires a careful shift in the character and appeal of public radio’s most listened-to national programming, parallel change at stations, especially those with the largest audiences, and investments in innovative programming efforts.

The potential impact of realizing greater inclusiveness and diversity at our most successful stations in those markets with the largest communities of color is easy to grasp. Major news stations like WAMU (Washington), WNYC (New York), WBUR (Boston), KPCC (Los Angeles), WLRN (Miami), and KQED (San Francisco) already reach large numbers of African-American and Latino listeners, the only two racial/ethnic groups measured by Arbitron.

These stations have large overall audiences and are located in markets with large numbers of African-Americans, Latinos, and other racial and ethnic groups of significant size. If the appeal of their respective services tilted even modestly more in the direction of these constituencies, the collective results would be significant.

This is a bold direction for public radio and not without risk. It is our clear sense, however, that it is where the leaders of these stations and many others are ready to go.

“It’s not just reporting *on* the story, it’s how we define what the story is and who we reference for a perspective. Even if our audience was the same tomorrow as it is today, we have to create these

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connections with our community to execute good journalism.” *Dean Cappello, Chief Creative Officer, WNYC, New York*

“We need more serious resolve and effort to recruit new voices to our organizations, to bring different views and skills into the station and onto the air. We have to diversify staff, especially on air, to better reflect our community and incorporate new perspectives on life.” *Robert Peterson, Administrative Manager, KWMU, St. Louis*

How does this change happen? The themes that surface repeatedly in GROW THE AUDIENCE conversations center on community connection, tone, and sensibility – the composite effect of how we tell a story and the stories we choose to tell; who we pick as experts and the reference points in our analogies and metaphors; announcing style, pacing, and vocabulary; the artists and songs we choose for interstitial music – all the things that make some people feel “this is me” and others feel “this is someone else.”

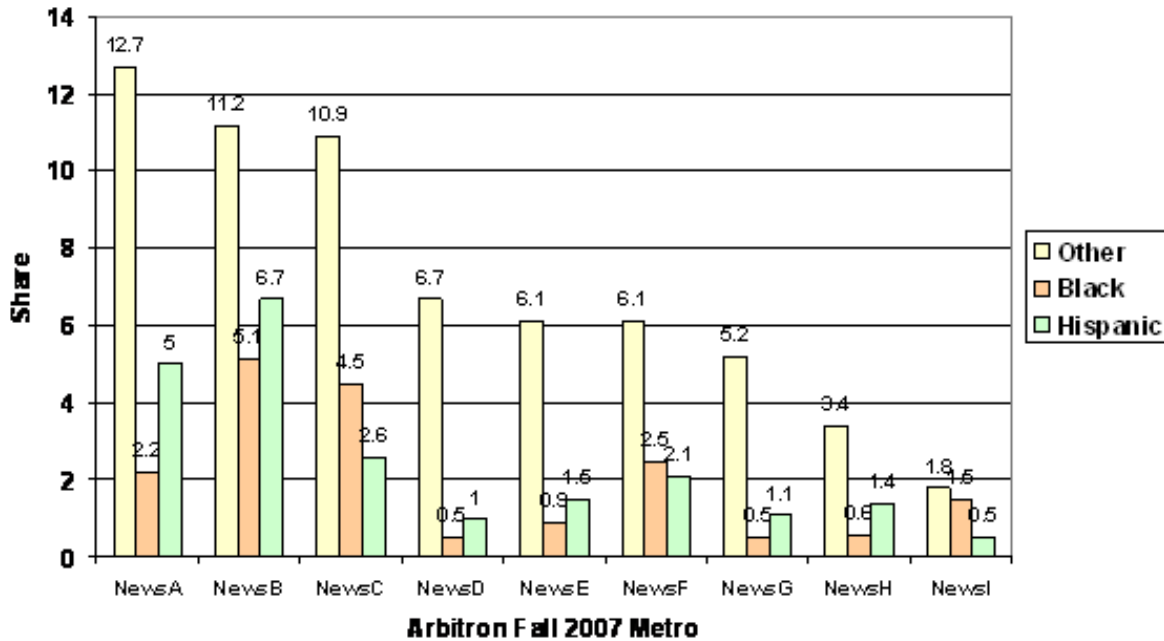
Loretta Rucker, of the African-American Public Radio Consortium, parsed the point this way:

“First and foremost is the issue of presentation. Second, even those educated African-American opinion-leaders who listen to public radio’s primary news programs feel that there are not enough stories and voices that reflect their communities in the mix. And third, there is the issue of perspective. People of color in general make a distinction between a generic host or guest (who may or may not be of color) and those with the express purpose of expressing the perspectives of their communities. Both are appreciated, but the distinction is clear.”

Beyond Tone and Sensibility. Henry Cisneros, former Secretary of Housing and Urban Development, recently spoke to Public Radio in Mid-America (PRIMA) about the critical role public radio can and should play in actively breaking down and through media representations of different racial and ethnic groups that contribute to persistent negative stereotyping in our culture. Native Public Media’s Loris Taylor writes, “In the absence of alternative representations and broadened news coverage, one-sided portrayals easily become the reality in the minds of our audiences. Public media is a medium of trust and a solid foundation upon which to expand a communications and information network that lifts up and educates audiences across the board of our rich diversity.”

Understanding Current Patterns. To understand where we begin, GROW THE AUDIENCE examined the pattern of listening across Arbitron’s three measured racial/ethnic categories – Blacks, Hispanics, and Others. Knowing that the strongest predictor of public radio listening is education and that educational attainment differs by race and ethnicity, we “held constant” for education and examined listening by college graduates.

**Share Of Radio Listening -- NPR News Stations
Black, Hispanic and Other College Grads**



This chart shows the share of listening by college graduates to nine **news stations** in the nation’s largest markets. For example, station “News A” at the left captured 12.7 percent of all radio listening by college-educated Other listeners in their market, 2.2 percent of the total listening by Black college grads, and 5 percent of the listening by Hispanic grads. There is a clear overall pattern: the share of listening among “Other” listeners (mostly White) exceeds the shares of listening among Black and Hispanic listeners by very large margins.

Within the broad pattern there are also important station-to-station differences. The share-of-listening chart above is based on a single survey period and we recommend further exploration and analysis before drawing conclusions about individual station performance. With more data and scrutiny of both the stations and the markets, it should be possible to identify key factors and successful tactics for inclusion and diversity that could then be shared.

Signature National Programs. For public radio’s news stations to realize a shift in their appeal to more people of color, it will take changes in the national programming they present in their most important hours of the day. The programming success and the audience appeal of public radio’s news stations and news-and-music stations reflect a partnership of local and national efforts. For most of these stations, a handful of national programs accounts for a huge portion of listening and profoundly shapes the

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stations' appeal. In Los Angeles, for example, about half the total listening to both KPCC (news) and KCRW (news and music) is to NPR's weekday and weekend news magazines.

Public radio's signature national programs not only generate a huge percentage of overall listening for news and news-and-music stations, they also are the beneficiaries of perhaps 10 percent of public radio's total economy, with numbers approaching \$100 million flowing on an annual basis from stations, business sponsors, foundations, and individual donors.

New Programming. Different programming causes different listeners to listen. We recommend investments in program innovation at both the local and national level – prototyping, testing, and developing programs and formats that explore different styles and sensibilities with the aim of greater appeal to audiences of color. This effort must be mindful that race and ethnicity are limited tools in programming development and give close attention to the values, lifestyles, and interests that will define the programming and those who respond to it.

In designing and developing such programming, it is important to take aim at the most important times on stations' schedules as well as the more common strategy of offering options for off-peak hours. As discussed in more detail in the following section, "The News," public radio has opportunities to pursue meaningful differentiation of audience appeal *within* the broader news franchise. That will happen in the most meaningful ways as stations have strong, compelling programming with which to anchor their service in prime times.

New People. GROW THE AUDIENCE has heard time and again that success in achieving inclusiveness goals in public radio's programming turns on greater inclusiveness among those who create the programming. In New York, Maxie Jackson, WNYC's Senior Director for Program Development, designed an aggressive approach to match mission and the people in assembling the production team for the new program *The Takeaway*. WNYC advertised with organizations that included the Asian American Journalist Association, Spelman College, Native American Journalist Association, National Association of Black Journalists, National Association of Hispanic Journalists, South Asian Journalist Association, and WNYC.org. Hires were made based on criteria that included journalistic expertise, work ethic, intellectual curiosity, and openness to new media. The result is one of the most diverse production teams in public radio.

"Coalitions of the Committed." We recommend a focused and collaborative initiative to increase the accessibility of public radio's major formats to people of color through institution-changing, appeal-shifting efforts by committed and ready stations with the largest audiences in markets with the largest populations of African-Americans and Latinos and similar efforts by national producers to increase their service and value to people of color. This initiative should include managed, multi-year projects that involve learning, change, and mutual accountability.

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Such efforts might be similar to the Station Resource Group's Leaders' Partnership that created public radio's first collective efforts in major gifts fundraising. Or the Public Radio Internet Station Alliance (PRISA), through which a half dozen stations worked together exploring early online activities. In these examples, the participating stations shaped their agenda as the project unfolded, drew resources from both in the field and outside experts, committed to sharing what they learned, and presented their progress, problems, and results to each other in an atmosphere of mutual accountability.

Effective "inclusiveness coalitions" will require support for:

- Audience research to explore such issues as the current patterns of information consumption among target African-American and Latino listeners, broader patterns of media use, and responses to programming changes over time.
- Advisors from outside public media who can help with planning and implementing change in governance and workforce development, drawing on successful efforts elsewhere in the nonprofit sector and in business.
- Program innovations both at individual stations in their local efforts and for larger initiatives that could be used nationally.
- Managing the connections among those participating in the initiatives to realize efficiencies in finding outside knowledge and advisors and to foster a shared sense of work and accountability.

Multiple Stations, Differentiated Services

Increase the number of markets in which public radio presents its strongest formats over different stations, each with a focused and differentiated service.

Achieving changes in the inclusiveness and diversity of public radio's large-market news stations would have an important impact on the overall field. But public radio has other strong options as well. GROW THE AUDIENCE also examined the patterns of listening by Blacks, Hispanics, and Others to public radio's classical stations and jazz stations. These analyses produced significant differences in the response of the different racial/ethnic groups, but in different patterns than we saw for news.

- Among seven large-market **classical stations** we examined, the pattern is that the classical format, whether public or commercial, can attract Hispanic college grads along with Others – in some cases with near-equal shares – but its appeal to Black listeners who are college graduates is limited.
- Among seven large-market **jazz stations**, the pattern is much higher shares among Black college grads than are found among Hispanic and Other college-educated listeners, with most stations claiming about equal shares of listening from the latter two groups.

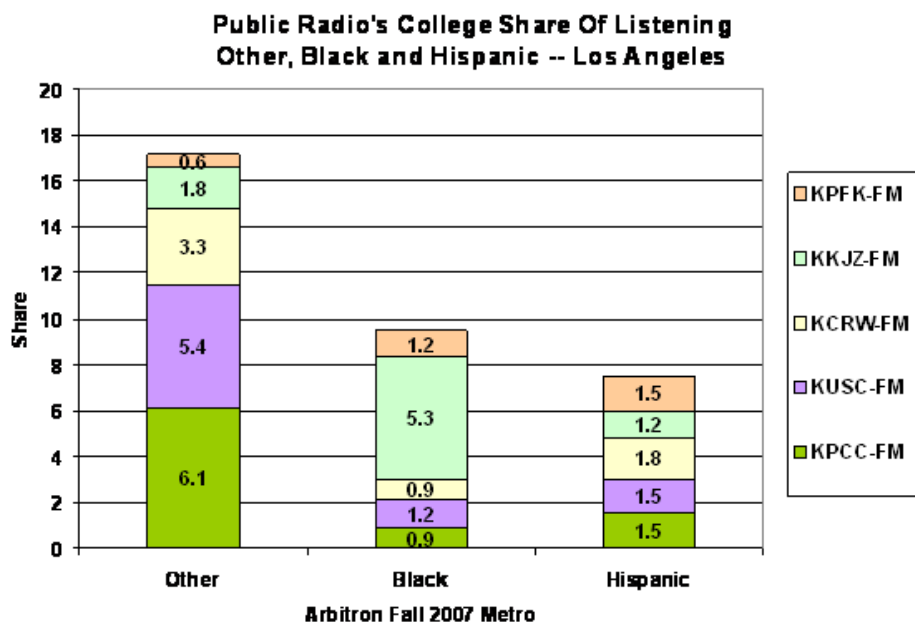
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Other music services, such as AAA, have their own distinctive patterns of audience appeal as well.

The classical and jazz findings point toward a second key element in an overall strategy for audience diversity – the **importance of multiple stations with different formats in realizing audience diversity goals**. Different programming causes different listeners to listen. Encouraging multiple public radio services in as many markets as can support them, and, as important, encouraging meaningful differentiation of the services offered by each of them, will increase audience diversity.

This principle is illustrated in the following example from Los Angeles, one of the most diverse major markets in the country. It is important to note that this chart shows a single survey period, Fall 2007. Individual station data might look different if several surveys were combined and as more recent changes in the market are reflected. The important information is the broad pattern.



This chart shows the pattern of public radio's service to college graduates in Los Angeles through multiple stations and multiple formats in Fall 2007.

- Listening by college-educated Other listeners is driven by news KPCC, classical KUSC, and news-and-music KCRW.
- Over half of all public radio listening by college-educated Black listeners in LA is to jazz station KKJZ.
- Listening by college-educated Hispanics is spread across all five public radio stations, with no one of them achieving a real breakthrough to this audience.

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Another lesson from Los Angeles is that even with its different stations and different formats, and even focusing just on college-educated listeners, where we would expect public radio's performance to be strongest, shares of listening by African-American listeners and by Hispanic listeners are dramatically less than shares of listening by Others.

Public radio should also look beyond news, classical, and jazz to other formats that might hold a greater appeal for African-Americans, Latinos, and/or younger listeners. In Los Angeles CPB is currently supporting a project that aims to create a new sound and media resource that will appeal to a younger, urban, English-language and majority Latino demographic that itself is highly diverse in terms of education, class, home culture, and language. In Chicago, WBEZ's *Vocalo.com* is letting the listening community both define and produce the news. In Milwaukee, WYMS continues to refine a contemporary-music-based service under the banner "diverse music for a diverse city." These and other efforts at innovation are all at the edges of the current system and there are, as yet, no "breakthroughs" in audience service to report.

Diversity of Ownership and Control

Continue investments in operations and programming of stations owned and controlled by people of color, increase their number, and strengthen their programming performance.

A central, long-standing theme in public radio's collective work to shape a diverse service has been a commitment to diversity in station ownership and control. Over the years CPB and others have fostered development of 75 CPB-supported stations at which the majority of those governing the licensee organization and a majority of the staff are African Americans (31), Latinos (11), Native Americans (29), or a combination of the foregoing (4). With broad support from the public radio system, CPB provides these stations with larger basic annual grants than other stations and matches their local support at a higher rate, recognizing the particular economic challenges they face.

CPB has also made multiple investments in national programs that have been developed by and that are principally used by these stations, such as *Linea Abierta*, *Noticiero Latino*, *National Native News*, and *Native America Calling*. CPB has also funded several program initiatives developed by NPR and the African-American Public Radio Consortium that have been widely used by African-American stations as well as others, such as the *Tavis Smiley Show*, *News and Notes*, and *Tell Me More*. The Public Radio Satellite System provides, at no charge, a full-time distribution channel for both *Satélite Radio Bilingüe* and *Native Voice One*.

These investments have produced measurable dividends in the diversity of public radio's national audience:

- Seven of the ten public radio stations that generate the most African-American listening are controlled by African-Americans: WBGO (New York), KCEP (Las Vegas), WPFW (Washington), KMOJ (Minneapolis-St. Paul), KKJZ (Los Angeles), WBAI (New York), and WEAA (Baltimore). The

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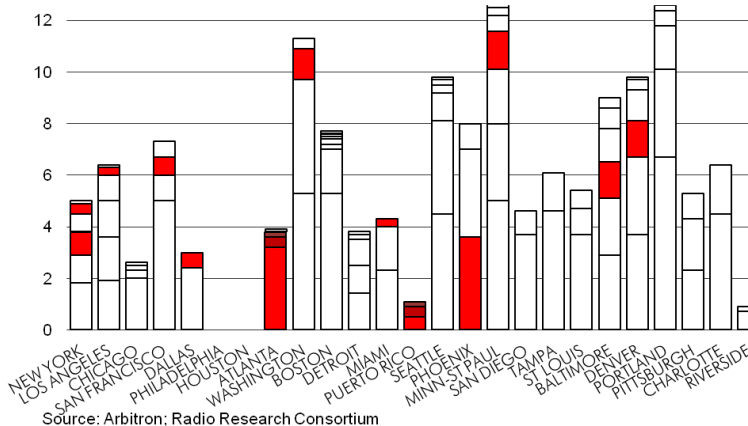
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other three stations in the top ten are WAMU (Washington), WNYC-AM (New York), and WBUR (Boston). Source: Arbitron as processed by AudiGraphics, average of Fall 07 and Spring 08.

- Three of the ten stations with the most Latino listening are controlled by Latinos: KNAI (Phoenix), KANW (Albuquerque), and KUFW (Woodlake, CA). The other seven stations in the top ten for Latino listening are KUSC (Los Angeles), KPCC (Los Angeles), KKJZ (Los Angeles), WNYC-FM (New York). WLRN (Miami), KCRW (Los Angeles), and KQED (San Francisco).
- While Arbitron does not break out listening by Native Americans, virtually all of the stations that present an hour or more per day of programming targeted at Native listeners are Native-controlled.

We recommend continued strong support for public radio stations that are developed and controlled by people of color, which have demonstrably advanced the goal of greater public radio use by people of color. When opportunities arise to advance diversity of ownership and control through potential acquisitions or public service management agreements, aggressive efforts should be made to pursue them. Similarly, the success of some 33 Native American groups in gaining station construction permits through the FCC’s recent noncommercial filing window (and the prospect of still more to be granted) needs strong follow-up to get these stations on the air as sustainable operations.

Stations Controlled by People of Color



This chart shows the share of listening in the top 25 markets that goes to public radio stations (Metro share, Spring 2008, Arbitron diary markets only). Each segment of a bar is a different station.

The 17 stations highlighted in red are controlled by people of color, as are two stations in Houston (a PPM market not shown) and two other stations with audiences too small to report.

We recommend development of clearer quantitative and qualitative expectations of audience performance for public radio’s stations controlled by people of color, based on format, sustainable resources, and the characteristics of the different markets they serve. In the largest markets, there are several stations with full service signals that currently garner relatively small shares of listening. In some of the smallest markets of the country, such as those served by many of the Native stations, public service expectations may be quite different.

2. Journalism

Make public radio America’s most trusted and one of its most widely-used sources of daily journalism by strengthening the power and scope of its most listened-to national news programs, investing in program innovation that will lead to more choice and service for listeners, and supporting significant growth in the scale, quality, and impact of local reporting.

Public radio’s largest near-term opportunity for audience growth and new public service is in news – national programs, local news and information efforts, and aggressive expansion of online service.

2.0 Public Radio and Journalism

“All news” is the most-listened-to public radio format in all but a handful of the markets in which it is offered and news stations account for four out of every ten hours of listening to public radio nationwide. Public radio’s most successful news stations are anchored by NPR’s powerful news magazines *Morning Edition* and *All Things Considered*, are most readily identified through the salience of the NPR brand, and typically feature programs from other producers as well, such as APM’s *Marketplace*, the BBC’s *World Service*, WHYY’s *Fresh Air*, WAMU’s *Diane Rehm Show*, and *The World*, which is co-produced by WGBH, PRI, and the BBC. At the public radio stations and web sites that garner the largest audiences, local reporting within *Morning Edition* and other local news and talk programming play important roles.

News stations led public radio’s last major surge in listening, from 2000 through 2003. After a couple of years in which their audiences sagged along with stations presenting other formats, news stations are again growing – and at a faster pace than the rest of public radio. From Spring 2005 through Spring 2008, during which overall listening (AQH) to public radio grew by 2.3 percent (Arbitron Nationwide), news stations grew by 6 percent (Audience Research Analysis AudiGraphics, 99 news stations, diary markets only).

News is usually the strongest programming at the many public radio stations that offer a mixed format of news and music, attracting more listeners and more listening.

Even as public radio’s news and information programming stands in a position of great strength, the largest practitioners of daily journalism, America’s newspapers, are in deep distress and shedding thousands of jobs. Their plight follows the general abandonment of most serious reporting in

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commercial radio and dramatic curtailments in broadcast television news. Further large changes in the organization, business models, and availability of journalism in America are imminent.

There is both responsibility and opportunity for public radio in these developments. At the same time, we need to be realistic about public radio's current capacities, at both the national and local levels, and we need to be focused in our aspirations to be something more.

Public radio's journalism enjoys remarkable trust by the American public – year after year, poll after poll. At the national level NPR is our strongest journalistic brand, along with individual programs such as *Marketplace* and *The World*. Locally there are perhaps ten public radio stations with a significant local news capacity – 20 or more reporters, producers, editors, and anchors – and another dozen with about half that.

We have other journalistic assets: independent producers and freelancers, international broadcasters (most notably the BBC), a few partnerships with newspapers at both the national and local level, and several loose relationships with emerging stand-alone online news operations. But these assets are generally disaggregated and mostly at the edge of our field.

Claiming a significantly larger role in American journalism will require a much more robust news-gathering capacity – more “feet on the street” with notebooks, recorders, and cameras and more editors and producers to shape their work. The distance between current reality and the role we imagine – and that others urge upon us – is large.

Public radio must also think carefully and collectively about the character of the journalistic franchise to which we aspire. We cannot simply take up roles, beats, and topics as they are left behind by others. But we must think considerably beyond what we are doing now. We should proceed in an audience-centered fashion, beginning with the interests and needs of those who already respond strongly to our news and information programming and building to a larger audience of news users.

2.1 Journalism: National Programs

Strengthen public radio's most listened-to national news programs with a renewed focus on these programs by senior network executives, stronger reporting from across the nation, a greater commitment to enterprise reporting, more diverse views and voices, and exploration of new approaches to the availability and organization of national content.

Renewed focus on key assets. A short list of signature national news programs generates a huge amount of listening for the system as a whole, as much as half or more of all listening for the stations that carry them, and greater listener loyalty than most other programming on station's schedules. NPR's *Morning Edition* and *All Things Considered* top this list, which also includes *Fresh Air*, *Talk of the Nation*, *Weekend Edition*, *The Diane Rehm Show*, *Marketplace*, and *The World*.

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Many in public radio believe that in recent years NPR's top management "took their eyes off the ball" with respect to the broadcast performance of key national programs. It takes nothing away from revitalization efforts already underway inside NPR and station-focused efforts such as Morning Edition Graduate School to assert that more needs to be done to reinvigorate and renew these programs on a continuing basis. Key steps include:

- Assure continuing management focus and budget priority, both nationally and locally, on the core programming assets of the public radio news franchise.
- Invest in research to monitor the changing information environment in which public radio's signature news programming competes for attention and the changing information needs of the listeners they seek to serve.
- Commit to regular, ongoing editorial and operational communication and coordination between senior national program executives and station leaders in programming and news that centers on the performance of key national programs.

Reporting from across the nation. We recommend a significant increase in public radio's national reporting capacity from across the nation. Current national reporting is criticized as too often sounding like "parachute reporting" or "cockle-warming" features from the heartland. We have heard from station programmers and news executives that audiences would like to hear more reporting from outside the usual media centers (New York, Washington, Los Angeles, etc.), which they suggest often yields distinctive stories that "really stick" with listeners.

How to achieve such reporting, however, elicits some differences of opinion and warrants further exploration and discussion.

Some assert that national reporting is an area in which national news producers, especially NPR, could make better use of station talent, resources, and reporting. In this view, station-based reporters – especially at leading news stations with experienced reporters, editors, and producers – should be tapped regularly to report for a national audience. This requires commitments by both national producers and stations, creation of mechanisms for regular coordination of a shared editorial agenda, staff training, and development of systems for workflow management. NPR's discussions of the as-yet-undeveloped "News Network of the Future" may fall in this area.

Others counter that opportunities to advance national reporting through national producer/station partnerships may be more limited than at first appears to be the case and that it is difficult for even the most accomplished reporters to report for both a national audience and a local audience. It is suggested that "from the field" national reporting requires an allocation of resources for reporters and editors based around the country who would be focused on reporting for their network. One scenario would be

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for NPR to create four to six regional reporting centers, staffed by several reporters, a producer, and a regional editor. The facilities might be co-located with stations, but perhaps not.

Enterprise and Investigative reporting. We recommend increasing public radio's now-limited investment in enterprise and investigative reporting. Those concerned about the current state of American journalism often mention the critical role of "accountability reporting" with respect to government, corporations, and large issues and interests in civic life.

At its best, investigative reporting produces high visibility, high impact coverage that both makes a difference on important matters and advances the credibility and authority of a news brand. Such work could align closely with public radio's public service mission.

At the same time, this is difficult and costly reporting and some believe the cost/benefit equation is not strong enough for public radio to consider this path until resources for the field have increased dramatically.

To mount a serious investigative effort, public radio should build on the efforts already in place within NPR news and American Public Media's documentary unit, American RadioWorks. Initial efforts might focus on three or four enterprise/investigative teams that, together, would be expected to break about one major story per month.

Diverse views and voices. While we discussed the point in detail in the preceding section on "Inclusiveness," we reiterate here our recommendation that public radio's signature national news programs need more diverse voices and views across the range of daily stories, in the people doing the news, and those presenting analysis. This will increase the accessibility and authenticity of programming in communities across the country that are becoming more diverse. This emphasis on a wider range of views and voices should not be confined to "target" programs, but built into public radio's major news programs.

Programmers urge all national producers to avoid an oft-heard homogeneity in delivery tone, to create more settings in which people from different backgrounds speak the way they speak among themselves, with a sound that rings true and authentic both for those like them and for those not. In addition to the on-air hosts and reporters, national producers need more people of color as editors and editorial gatekeepers at all levels.

Explore new approaches to organization and availability of national content. GROW THE AUDIENCE'S consultations with programmers surfaced several suggestions for changes in how national producers organize and make available to stations their national content, some very focused and others very broad.

Multiple uses of content. National producers should allow stations to use exceptional pieces outside the program in which they are originally presented. Some stations would like to "unbundle" pieces from

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the NPR news magazines and other national programs on their own so they can present them elsewhere in their schedules. Others envision national producers selecting several “top stories” each week that would be offered, on a stand-alone basis, perhaps through Content Depot or PRX. National producers might also consider replaying some pieces from their weekday programs in their weekend vehicles, perhaps with some add-on or follow-up reporting.

Exploration of a possible NPR news stream. Some programmers suggest that NPR move from distinct news programs toward a continuously available news and information stream that is unified editorially, designed and paced with sensitivity to changing listener needs and interests in different day parts, but which listeners can enter at any time with a sense that they are immediately connecting to a service they know and trust. Those favoring such an approach believe it better aligns with how listeners use the radio and makes even more sense for how listeners use services offered online.

Others believe current public radio news programs and hosts have distinctive identities, personalities, and daypart sounds and sensibilities and that public radio listeners like and value these qualities. In this view the distinctive personalities of the programs give a unique flavor to public radio news and keeps public radio apart from the sometimes drone-like qualities of the cable news channels and other all-news-all-the-time services.

An NPR programming stream would have dramatic implications for how NPR invests its news resources, for carriage of programming from other national producers, and branding of station services. How would NPR and stations finance hours of additional original programming at substantial additional cost? How would such a format interact with current NPR mid-day talk offerings that do not flow into the magazine format, such as the *Diane Rehm Show* and *Talk of the Nation*, as well as offerings from other networks, such as *Marketplace*, *The World*, and *The Takeaway*? Given the likelihood that any such stream would be offered on the Internet by NPR itself, would this accelerate changes in the fundamental dynamics between stations and the network? These are not easy questions, but there appears to be enough interest in the “programming not programs” approach by a number of program directors to warrant further serious discussion.

Support the development of new national news programming that will give stations meaningful choices for differentiating their news services and give more listeners a news choice that meets their interests and needs on-air and online.

For all the power and success of public radio’s signature national news programs and the importance of close attention to their continued strength, long-term and large-scale growth in public radio’s news franchise also requires investment in innovation and differentiation.

Several years ago George Bailey of Walrus Research, in an SRG Discussion Paper, urged public radio to “Attack Yourself.” Bailey wrote:

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“Here’s what marketing strategists recommend when your product or service is so successful that it becomes a prime target—attack yourself. MTV attacked itself with VH1. General Motors attacked itself with Saturn. PBS did nothing and was attacked by Discovery, which attacked itself by launching TLC, Animal Planet, Discovery Kids, Discovery Wings, even Discovery Español.

“Going forward, we think that public radio could serve more listeners, raise more revenue and block the competition by establishing at least two NPR news stations per market, a winning strategy so long as each NPR news station takes a distinct position, clearly differentiated from the other.”

More recently PRI President (and Audience Task Force member) Alisa Miller made this case for multiple, differentiated news services both on-air and online:

“The BBC has retained its domestic reach in news on radio and grown through other platforms by offering more choices through different formats on radio and a variety of different applications on other media platforms. If BBC had just focused on strengthening Radio 4 (its premiere radio news channel), it’s unlikely they would have been able to retain and grow their radio audience to the extent they have.

“This need for more dynamism in franchises . . . to meet Americans’ needs becomes even more pronounced due to the growing space available on digital platforms, even as it is important to broadcast too. Competition will require public media to be prepared to offer more options in an infinite channel world.”

The decentralized character of public radio requires a collective effort if the differentiation that Bailey and Miller encourage is to be achieved. Stations will be hard pressed to succeed in pursuing a different news audience without the power and leverage of network program assets. National program producers that aspire to creating content for a different audience will not succeed unless there are sufficient stations that will commit to carrying such programming at times that matter.

Three key steps are necessary for a broad effort at innovative differentiation:

- Agree on approach. Resource constraints demand focus on a short list of possibilities. Public radio often defaults to the demography of age or race in talking about a different appeal. But both marketers and audience researchers who have worked with public radio counsel a more nuanced approach which, while it may include demography, would be based more on such factors as values, lifestyles, information needs, and patterns of media consumption. These are difficult choices and require careful consideration and consultation between station organizations genuinely interested in differentiation of news services and national producers.

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- Assess and sort current programming. With a differentiation plan or segmentation scheme in mind, it may be possible to assess and sort the character of existing national programming along these lines as an initial foundation of service.
- Invest in new, signature content. This will involve significant investment – but with the prospect of major gains in audience service and audience support.

2.2 Journalism: Local Reporting

Create a dozen high profile, station-based reporting centers around the country whose signature is superior local reporting, increase the capacity and performance of other stations that have made substantial commitments to local news reporting, and support journalistic collaborations that save money, incorporate broader perspectives, and achieve a larger impact.

Bill Buzenberg summarized the case for local excellence in “Five Tenets for Public Radio’s Future,” a GROW THE AUDIENCE essay.

“In every market, public radio is a critical, primary news source . . . Investing in local hard-news, fact-based, reporter-driven coverage has never been more essential as so many local newspapers continue to soften and contract, while local TV stations continue to go their merry ratings-driven, hyper ventilating, irrelevant way. Yes, quality counts, and good editing, fact-checking, and careful news selection are vital. But if public radio is to create the highest value that it can provide—and thus attract an audience that does not have to go elsewhere—it must make news sparkle at the local/regional level, as it so often does nationally and internationally.”

If public radio intends to take up some of the space in local and regional journalism now being abandoned by newspapers, it must achieve a local/regional scale considerably beyond that now enjoyed by even the largest public radio news stations. Where “failing” newspapers still employ dozens of reporters to cover their communities, most of public radio’s largest local news operations are fielding 10 or fewer regular reporters. Total newsroom headcounts – news directors, reporters, editors, hosts, producers – exceed two dozen people in fewer than 10 locations outside NPR.

There are three, non-mutually-exclusive paths toward the scale and effectiveness public radio needs if it is to make a major leap in the impact and significance of its local reporting.

We recommend increasing local broadcast and online reporting at a dozen stations with high audience service potential through significant investments that increase the number of news staff, enhance on-

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air and online news production capacity, develop skills for reporting and content management in a digital age, and foster innovative approaches to community connections.

Ten to fifteen stations (or state networks) are already embarked on efforts to build substantial daily reporting capacity. They are in communities in which we can envision long-term, sustainable funding that will grow as their efforts grow. Public radio, as a system, should invest in accelerating their development – much as was done at earlier stages of public radio development with “production center” and “major market improvement” grants – because of the immediate value these operations can deliver to the large audiences they reach, their role model for other stations that may follow this path, and the “talent magnet” such high impact, high visibility operations provide for both new and veteran reporters.

We have emphasized the importance of assuring a range of views and voices throughout the news reporting process at national producers – this is also true for these emerging “first tier” local news organizations.

A ramp-up of a targeted number of major, station-based newsrooms warrants a sustained, multi-year effort in which national funds from CPB and elsewhere would stimulate and match growing local investment.

In addition to these highly-targeted investments, we recommend initiatives for other stations that have made substantial local reporting commitments that will increase their capacity to create and present regular, high-quality journalism at a level consistent with the scale and resources of their organizations and communities.

Public radio needs to increase the reporting and editing capacities of stations with a substantial commitment to news and information programming. The key to success in such a broad-based effort is to recognize that expectations must be different in large markets, mid-sized markets, and rural communities, but to set a goal that all of public radio’s news stations can move forward toward higher quality in both on-air and online reporting.

Most of these investments will be made by individual stations as they develop and allocate resources toward news gathering and presentation. However shared efforts, such as NPR’s Morning Edition Grad School (MEGS), Public Radio News Directors (PRNDI) workshops, and other such projects can leverage existing research and practical knowledge to inform local strategies and practices.

The most critical station needs are in basic broadcast journalism. Marcia Alvar, Director of NPR’s Local News Initiative, exhorts stations and the system to “Use what we already have. Do what we already know,” and places a strong emphasis on the need for quality in local news:

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“PRPD’s ‘Sense of Place’ research reported widespread listener disappointment with the quality and consistency of local news programming. This finding was consistent with those of three earlier studies including PRPD’s 2001 “Core Values of Local News/Information Programming” and both Local News Project I and LNP II studies for PRNDI done by Market Trends Research. Covering a period of seven years and built on different methodologies, all four studies point to the same inescapable conclusion: we are paying more attention to quantity than quality.”

Given the steadily increasing importance of the public radio news franchise and the still largely under-developed capacities at stations working within this franchise, we recommend an annual investment in professional development for local news programming personnel.

We recommend support for collaborative projects that advance shared use of local station reporting on a regional and topical basis and investments in shared resources such as editors for broadcast and online content. Such efforts should have a clear focus on cost reduction, wider use of content, or both.

Public radio can achieve local/regional scale through collaborations among public radio organizations. While there are numerous small-scale examples around the country, mostly in the form of shared state-house reporters and FTP news exchange sites, examples that involve multiple reporters, significant investments, and a regular on-air presence are rare. One example in recent years has been the Northwest News Network, involving a number of stations in the Pacific Northwest. Participating stations have invested in a shared editing and reporting function, as well as contributing stories coming out of their own newsrooms.

Station collaborations do not need to be exclusively geographic in their focus. Another approach is to organize around shared editorial themes such as economics, education, the environment, health, and other such issues that often receive priority in public radio newsrooms. Participating stations would share their content “horizontally” across the public radio system. PRX is a vehicle for such collaboration. A variation on the “News Network of the Future” mentioned previously might do the same.

Investments in this approach would aim at overcoming the significant barriers to start-up of such collaborations, helping collaborators demonstrate the value of shared efforts in order to attract future investments from the stations themselves and other funders and sponsors.

We recommend experiments with partnerships and collaborations that look outside public radio to other content-creating organizations and community resources and development of a recommended editorial framework to preserve the trusted position and integrity of public radio in this more inclusive and multi-dimensional environment.

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Scale is also achievable through partnerships and collaborations that look outside public radio. The proliferation of accessible media tools has multiplied the number of groups and individuals that create and collect information about our communities. While many of these individuals and organizations have their own direct pathways to audiences online, few have the visibility and reach of our stations. Online-only news organizations (often staffed with newspaper refugees), arts and cultural organizations, and blogs and listserv forums on community issues such as education, health, the environment and local politics are a few examples.

Stations will need to give careful thought to the principles, policies, and practices that shape which organizations and individuals they choose to work with and how they distinguish their own work from that of their community partners. But there are significant content opportunities both for broadcast and online presentation in this space.

Two kinds of investments would advance such outward looking partnerships. One would be to encourage and support a few demonstration projects that show what a “full bore” partnership model might look like. The other would be to formulate the editorial framework needed to preserve the trusted position of public radio in this new, more inclusive and multi-dimensional environment.

2.3 Journalism: Integrated Online News

Create an integrated online news presence for diverse public media sources – international, national and local – that extends current capacities and brands, leverages current editorial assets and adds or creates new ones, and that might include the distinctive strengths and separate assets of public television and online public service media organizations.

GROW THE AUDIENCE’S New Media Working Group envisioned a world-class, collaboratively-managed public service media news site that would provide an online presence comparable to the BBC, the *New York Times*, *The Washington Post* or CNN. The site would integrate content from multiple sources and brands – international, national, regional, and local. By matching IP addresses to locations and opt-in preferences, users could be presented a localized version of the site, in some ways replicating the listener experience of *Morning Edition*, which might move from an NPR foreign bureau to a *Marketplace Morning Report* to a local update from City Hall.

The Working Group surfaced several ideas for how to best integrate local and national elements, but there was broad agreement that such seamless technical integration was essential. There is substantial divergence on how to best name and brand the site, however, as well as how to structure and monetize it. Also worth considering would be partnerships with local newspapers, combined public radio and public television efforts, and special emphasis on reaching audiences now outside the principal public radio constituencies.

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This would be a huge and complex undertaking, surpassing in scale other coordinated digital initiatives such as the now-under-development *American Archive*. But it is probably public radio's best bet for a presence in online services that would be comparable to the role and impact it has achieved in broadcasting.

Many of public radio's programming and new technology leaders have participated in one or more discussions about a shared backbone or infrastructure for digital distribution of public radio content – without meaningful fruition. An observation about those efforts is that they centered more on technology and structure than on content.

More recently, an *ad hoc* group of public radio and television leaders opened a discussion about possibilities for aggregation and collaboration in online public media journalism. The group mapped out several different possibilities for such an integrated effort that speak equally well to both integration and collaboration among multiple parties within public radio or to efforts across public radio and public television.

We recommend that public radio and other public media partners move as quickly and as far as possible through a sequence of non-mutually-exclusive steps to build public media's online news capacity.

Collaboration behind the curtain. Threshold opportunities to enhance the productivity and impact of public radio and public television's online journalism can be realized with no change in public-facing identities of the respective producing and distributing organizations. Frequently cited collaborative measures include coordinated backend systems, APIs, standards, tools and shared investments in activities such as federated search and search engine optimization (SEO).

Aggregation of public media journalism. Public television and public radio's online journalism is currently presented on sites that align with separate networks, producers, shows, and stations. There is no integrated public media journalism presence, scant cross-linking or promotion of other public media content, little unified branding, and weak search optimization. This makes it harder for users to find our content than it should be and fails to capture natural affinities that cut across our work.

Much as NBC and Fox created Hulu as a single online vehicle to distribute their respective sitcoms and related material, public media could create a public media journalism destination that presents work from multiple sources – international, national, and local – showcasing of our collective efforts in a way that both stands on its own and leads back to our respective entities.

In one view this function could be advanced through a single, high visibility site that would give the online user an integrated yet varied experience, much as the many local versions of *Morning Edition* are perceived by radio listeners. Others suggest users will increasingly seek content that is organized in

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content verticals and that we should not confuse our desire for aggregation from multiple sources with an audience desire for focused presentation. This point extends through the following steps as well.

Aggregation plus curation. Hulu has grown to include content from dozens of sources beyond its two founders. Similarly, an integrated public media journalism effort could also include curated content from other sources, ranging from conventional journalism partners to online-only journalism initiatives to various citizen journalists and other kinds of user-generated content.

Such steps toward partnership and participation currently play only a small role in most public media journalism but will grow over time as our organizations learn how to manage such relationships and as users, supporters, and major funders increasingly expect it.

Content collaboration. Public broadcasters have periodically collaborated on content creation. Minnesota Public Radio organized several rounds of an annual Public Radio Collaboration in which national networks and stations collectively focused on a single topic for a week's worth of programming, which also included several program-specific partnerships. This past year CPB sponsored an Election Collaboration that spanned public television and public radio and is following with a new collaboration focused on the economy.

Most observers have considered these efforts modest successes at best. They have often been more “parallel play” than true collaboration. Suggestions to improve the impact include the need for larger scale, stronger commitment of original reporting resources to the collaborative endeavor, and greater investment in the “collaborative tissue” that organizes and focuses the work – not just expecting partners to carve out time from their current roles, but rather a strong central capacity that is accountable to the overall collaboration.

A new or expanded journalistic entity whose mission would be web-first but would feed to broadcast platforms. This vision for online public media journalism calls for an entity that would be organized and focused principally on online content, creating text, images, audio, and video in a fashion that draws on the values, strengths, and brands of public broadcasting but works to a tone and sensibility that is “native” to the networked space. In a turn-about of current practice in which radio and television material is often “exported” to the web, this entity would feed its online work back into the radio and television realms.

The entity might be embedded within an existing organization or created in a new and neutral “third space” outside existing networks and between public radio and public television. It would need sufficient scale to create a distinctive and competitive presence on a daily basis, perhaps aiming for an initial staff of 200 or more.

The output of the entity could take several forms, from a single destination or portal-type site to multiple, content-focused sites. Similarly, the focus could be principally on a national identity or on integration with local efforts that would give users a geographically-customized experience.

3. Music

Build public radio’s music services through better integrating music into public radio’s service vision, adding music stations through acquisitions and operating agreements, stronger performance, a strengthened position in the networked space, and innovation in presentation and new genres.

“If news is the brain of public radio, music is the soul. But, somehow, music has less status. It’s not as much on the public radio radar as it used to be. For a lot of our listeners, though, it’s why they come to public radio. And I think we risk losing people who want to be part of our public radio family.”

Davia Nelson, Kitchen Sisters, GROW THE AUDIENCE Session, Third Coast Festival, Chicago

Public Radio and Music

Music is a critical part of public radio’s audience service equation. It accounts for a significant portion of the listeners who tune to public radio each week and a major share of total public radio listening.

“All music” stations that present public radio’s three dominant music formats account for one out every four hours of public radio listening.

- 46 classical stations accounted for 15 percent of all listening to public radio in Spring, 2008.
- 25 mostly jazz stations accounted for 6 percent of all listening
- A dozen AAA stations accounted for 4 percent of all listening

Add in the listening to music presented on the scores of news-and-music stations and those stations presenting music other than classical, jazz, and AAA and music accounts for more than one out of every three hours of total public radio listening.

Music stations play important roles in the racial and ethnic diversity of public radio’s service. Classical stations like KUSC (Los Angeles) and WETA (Washington) reach large Latino audiences. Half of the top ten stations for African -American listening feature jazz. Public radio’s Native stations are predominately music-based.

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Most of public radio's most successful online services are music-based – 15 of public radio's top 20 streaming stations (measured in terms of “average tuning hours/ATH”) feature one or more music streams. Public radio's leading classical, jazz, and AAA stations hold similar positions online. Stations like KCRW (Los Angeles) and KEXP (Seattle) have established national online brands for themselves in contemporary music. WKSU (Kent), with *Folk Alley*, and WAMU (Washington), with *Bluegrass Country*, have established 24/7 music channels that are distinct from their primary broadcast service.

NPR Music, National Public Radio's steadily expanding online service, is morphing into its own full site with concerts, interviews, features, and links to an array of music streams from NPR member stations. NPR Music tests the idea of an integrated portal of material from diverse sources – not unlike the notion proposed for news in the previous section – and also the idea of a single pathway into multiple music genres.

The Public Radio Tuner iPhone application has become the top ranked free music application on the iPhone, with over 1.5 million downloads as of April 2009.

Despite all this, public radio's music services are not fully integrated into system conversations about strategy and service. Part of the reason is political and cultural – the various political entities at the federal, state, and local level that contribute significant sums to the public radio enterprise tend to be more focused on civic life and public affairs. The sensibility that lets music and art fade from public schools also relegates public radio's music and cultural offerings to a lower level of respect and interest.

Part of the reason is industry perception. The long arc of public radio programming and listening bends in the direction of news. News and talk programs replace music on news-music stations' schedules; all-news stations replace mixed-format stations in several markets each year; and most of the net growth in listening to public radio over the past decade has been to news and information programming. Further, public radio music has no visible public champion – senior network executives almost all associate themselves with news rather than music.

And there are structural issues. Music elements within mixed-format stations play second fiddle to news as news attracts larger audiences and more dollars. Many all-music stations – especially classical – are part of multiple station operations, paired with either a public television station or an all-news station that has a much larger constituency, and sometimes the music station is relegated to the role of cash-cow.

Brenda Barnes, president of the University of Southern California's classical music stations, observes that “public radio” has become more synonymous with the NPR brand and writes, “I fully expect that music stations and other kinds of stations will move more to the fringe, not more to the center, at least for the foreseeable future.”

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But whether music stations are at the center or at the fringe of the overall enterprise, public radio clearly has valuable radio assets in the music area and the opportunity to make these services more meaningful and valuable for millions of listeners both on-air and online.

Capture the Broadcast Franchise

We recommend a concerted effort to increase the number of markets in which stations offer public radio's strongest music franchises – classical music, jazz, and AAA – on a consistent basis. This can be achieved through a combination of self-directed change and focusing at current public radio stations and adding or changing the control and direction of stations through acquisitions, mergers, and management agreements.

The largest audiences and highest listening levels occur in markets where public radio's best-performing formats are offered by multiple stations that are differentiated from each other. In terms of format, public radio's most powerfully performing combo in larger sized markets is a news station featuring NPR and other network programs and a classical music station – as seen from Washington to Cincinnati to Portland and 18 other top-50 markets.

The primary driver of audience growth for classical music stations over the past several years has been public radio's "capture" of the classical music franchise through market changes or acquisition. This has occurred through abandonment of the format by a commercial station – in Washington, DC, WGMS shuttered its classical service and WETA assumed the franchise with great success and in Los Angeles commercial K-Mozart closed shop and KUSC became the sole classical outlet. It has also happened through acquisition of a station or control of the service through a management agreement – American Public Media purchased WKCP in Miami and Detroit Public Television now manages WRCJ in Detroit. Today, there are perhaps three major markets in which commercial classical stations are at the brink of turnover and several others in which there is no full-time classical station, commercial or public.

Although less dramatic, growth of listening to AAA stations has been driven by similar developments in availability, including acquisition and format change (Minneapolis-St. Paul), AAA stations entering the CPB-supported system (Baltimore), and emergence of the format from a previously eclectic schedule (Salt Lake).

The availability of jazz stations has been going the other way, with a station in one large market leaving the format (Milwaukee) and several jazz stations failing to remain qualified for the CPB-supported system (St. Louis, Orlando, Murfreesboro, TN).

Music in the Networked Environment

We recommend continued development of public radio music services – both core genres and special niches – in the networked environment of online and mobile devices and the development of an organized approach to music rights issues in this space.

The vast majority of public radio's current online music offerings are simulcasts of on-air services. A growing number of music stations are offering second streams, podcasts, archives, concerts, and special features. For everyone working in this area, however, long-term financial sustainability issues loom large. As KCRW General Manager Ruth Seymour put it in an interview in *Fast Company*, "The fact is no one has come up with a feasible business plan and that's a major concern. How do you sustain this gorgeous blonde? How do you keep her in furs?"

Determining how to expand activity in the networked, new media space is critical for music stations in remaining accessible and relevant for their audiences, especially with respect to younger listeners. AAA stations, with the youngest-skewing audience of the major public radio music formats, know this most acutely, but it applies to all the music formats and for listeners of all ages.

Music rights issues pose different challenges for the different music formats and make it more difficult for music stations to move aggressively into the new network age than their colleagues in news. Public radio recently concluded negotiation of royalties for online streaming of stations' broadcast services. The negotiations produced a comprehensive arrangement for the field and a single payment by CPB to cover the public radio system. But that contract ends in a couple of years, does not address numerous programmatic restrictions in copyright law, and covers only streaming services.

Using music in podcasts, for cell-phones, and in other settings requires obtaining the rights for each of these uses. Some artists and recording companies are eager to partner up, some have plans for exclusive domain in the networked space, and some don't want to give up rights that might be valuable in the future even absent specific plans. Rights issues have steered public radio away from the kind of innovation and experiments users associate with public radio.

An organized approach to identifying key rights issues and potential solutions would identify the scope of costs and obligations, encourage the development of more robust services in the network space, and clarify prospects for a workable financial model for public radio's music services in the networked environment.

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New Approaches

We recommend that stations and producers experiment with how public radio organizes and presents music within its current genres and to think outside the familiar genres to other music possibilities that might fit within the broader public radio domain.

Nearly three years ago some 60 leaders in music performance, music presentation, and electronic media gathered at the invitation of leading public radio organizations to discuss the future of music and media. One of the group's emphatic conclusions was the need to understand and respond to a changing audience.

“The audience for this music is evolving in tandem with the aging of the baby boomer population, the growing power of youth media habits, the integration of immigrant populations into a changing mainstream, and other huge cultural and demographic shifts. Young people, in particular, inhabit an omnivorous media and musical environment with many more choices, fueled by a global internet and an ‘iPod culture’ that allows them to find, sample, and experience a dizzying array of musical genres and cultures with much lower barriers than ever before. We must adapt the creation and presentation of ‘ambitious music’ to this pervasive, user-driven, self-defining musical culture.” (*A Report on the Music & Media Forum*, Global Business Network)

There are really two provocations here. One is to rethink how public radio organizes and presents music within its current signature genres. A few stations are doing just that, mostly in fringe listening periods, on HD2 channels, or online. There needs to be more.

The second challenge is to think outside the familiar genres to other music possibilities that might fit within the broader public radio domain.

When we look at public radio music stations, we see different genres of music in which “better” performing stations are either in the 2-3 share range (classical) or 1-2 share range (jazz and AAA). In all of these genres there are a few top performers – stations that really pop out of the crowd – and numerous stations that are seriously under-performing, *but sustainability for a public radio music service is somewhere in these ranges of market share.*

Public radio should open its mind to new music possibilities – especially music that has not had a niche in the public radio landscape. In the space between commercial viability and near-certain obscurity, what are the music genres that pass public radio's smell test and would generate at least a 1 share in the top 50 markets? What music would appeal to a demographic a decade younger than classical, jazz, or AAA?

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For some years it has been clear that the broad direction in mass media is smaller audience shares for any given channel and that larger shares must be aggregated across multiple channels. This trend is accelerating for radio's music services faster than for news. In this regard it is instructive to consider the growth strategies at Philadelphia's WXPB.

WXPB had a 1.7 share in Fall 2008, smaller than the other two public radio stations in Philadelphia but a top performer in the AAA music franchise. WXPB also operates World Café, a venue for concerts, performances, and community-events, a restaurant, and general gathering spot. The station produces the nationally-distributed AAA World Café program, makes four online streams available to users, three of which it produces in-house, has aligned itself with NPR Music, has a second HD service, and a host of other ongoing activities. WXPB is aggregating market share across every channel it can find.

Younger listeners are using online for much of their music – what about an online music service designed exclusively for the network space and aimed at capturing this demographic?

How about seriously considering some different music presentation techniques? Pandora is a personalized internet radio service that helps users find new music based on the individual's favorites – does this sound too algorithmic for public radio? How about a software version that builds on public radio's repertoire of music genres? PRX is exploring the possibilities for such a service for music stations' websites.

These are all speculations. None have been tested, vetted, or explored in GROW THE AUDIENCE. But public radio is stuck in a music box of its own making and the path out starts with ideas and experiments and a few risks until something sticks.

4. The Network

Use ubiquitous networked digital media to follow current public radio listeners in their changing patterns of media use, cultivate new users by providing more ways to find and use public radio content, and make public radio more flexible, participatory, and engaging.

We are developing plans for public radio audience growth in the midst of a global media transformation. Increases in the availability of computing power and storage, digitization of all forms of content, expanding telecommunications bandwidth, and the rise of a connect-nearly-anywhere Internet-protocol network accessible through an expanding number of devices will drive this change for years to come.

The transformation presents opportunities to increase public service – giving audiences greater, more convenient access to our work, enabling non-linear and ultra-niche offerings, and drawing audiences into the process of selecting, creating, commenting upon and sharing content. It also disrupts and threatens core elements of the public radio enterprise – broadcasting, journalism, recorded music, and geographic quasi-exclusivity. This interplay of opportunity and disruption has uncertain consequences for both established public radio services and new initiatives.

But it is not as though we stand at the edge of these changes. We are already deeply into them. The Pew Research Center's Project for Excellence in Journalism, which tracks media use on the broad and long-term basis, makes these observations:

“Radio is well on its way to becoming something altogether new — a medium called audio . . . To a greater degree than some other media, radio is unusually well suited to the digital transition. Voice and music are mobile and move easily among new platforms. And audio has done better as a medium of holding its audience than some other sectors.”

There are four important vectors of change for public radio within the broader transformation, each with its own dynamic of opportunity and threat for public radio's audience growth.

Shift in delivery platforms. Much of public radio's traditional strategic position – creating, selecting, and presenting content of high quality and depth – readily shifts from broadcasting to the networked

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environment. With that shift has come the opportunity to offer multiple program services, to offer listeners the ability to shift the time and place of their listening, to unbundle content from the linear program flow, and to reach audiences far outside the local broadcast contour. Concurrently, as others seize the same opportunities, public radio's listeners are gaining expanding choices and public radio's stations, producers, and networks face increasing competition from hundreds of other entities, including each other. Public radio can advance its strategic position through the media transformation, but all public radio organizations must rethink the competitive landscape and their respective place(s) within it.

Shift in relationships with the audience. The networked environment encourages change in individual media behavior and relationships between individuals and media institutions. Search engines, news feeds, podcasts, and links and recommendations from friends and colleagues shape daily consumption. Individuals take on curating roles with rankings, critiques, playlists, and postings on social networks. User-generated content moves from letters and call-in talk shows to raw material for professional productions, photos and blogs on station sites, and crowd-sourcing on a wide range of topics. At some point on this path, the relationship shifts from presentation to conversation, from one-to-many to many-to-many – not in everything (far from it) but in important ways felt by the institution and the user.

These changes can advance public radio's aspirations to connect and convene individuals and communities on civic and cultural issues, add depth and perspective to public radio content, and strengthen stations' positions as genuine community institutions. But they can also diffuse the stature and clarity of a station's identity, pose complicated questions about editorial integrity, redefine concepts of authority and authenticity within public radio's core content franchises of news and music, and claim time and resources far out of proportion to actual gains in use and value.

Shifts in relationships within the field. Content creators of all sorts have increasing opportunities to connect directly with listeners and users, bypassing conventional distributors and stations. And within a decentralized system like public radio, content can move in new ways, horizontally from station to station and among *ad hoc* networks of interest, bypassing large centralized networks. These shifts strain relationships within the public radio field and put both national and local business models at risk. The audience service impact of this disintermediation is determined by the value added by the intermediaries at risk. Some believe a direct-to-end-user shift will reduce inefficiencies and wasteful infrastructure while expanding audience choice and satisfaction. Others argue that the "publisher" role of both networks and stations makes it possible for them to support important, but less viable content (*e.g.*, international bureaus, local reporting, and emerging talent) and provides needed coherence and focus in an increasingly chaotic media environment.

Shift in who is "us." The networked environment lowers barriers to entry and allows many new entrants to claim a role as public radio or, more likely, public service media organizations. These emerging entities are staking claims to public attention, public policy support, and public funding. In some ways this is merely an extension of an issue that has been with public radio since its inception –

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sorting among the several thousand noncommercial radio stations to identify several hundred entities that qualify for public funding and participate in public radio's professional and collegial arrangements.

But it is also different. Among the growing number of public service media organizations that work entirely in the non-broadcast, networked space are entities at the leading edge with greater use, visibility, and support than those at the trailing edge of the public radio system. A growing number of communities have nonprofit, online-only media groups that, with respect to community partnerships, number of journalists, or foundation support, match their local public radio station. Public radio has only just begun thinking about how it will relate to these online-only efforts – as competitors, as colleagues, as partners, or something else. These questions are likely to become steadily more important, both operationally and as matters of public policy.

Guiding Principles

Media technology consultant Skip Pizzi and the GROW THE AUDIENCE New Media Working Group offered a list of 10 important concepts that public radio professionals should keep as touchstones in charting their courses through this emerging media environment.

- AGILITY** Today's most important survival instinct for media professionals is the ability to shift among content creation and delivery models more readily than in the past. Public media management must gain such agility to adapt to new platforms and a changing marketplace, while maintaining a central focus on core content strengths.
- BRAND** This is the fundamental asset of public media. It includes a rare combination of integrity/credibility with hipness and high marketability to certain desirable demographics. In fact, it manages today to hold slightly *different* values for several different demographics, and this potential must be expanded (another form of agility – maintaining multiple variations of branding for various audience cohorts). It's critical, however, that a coherent focus be retained. Perhaps this is best expressed as "My Proxy," in which public radio serves as a primary filter for a certain worldview – both for news/info and arts/entertainment – and ideally one that "works" (*i.e.*, translates easily) for several distinct demographic targets.
- MAINTAIN** Keep the anchor of an *on-air* service sacrosanct. FM is still strong as a core. Without it, public media web audience would be much less. Audiences are shifting, but at best there is still a 10:1 advantage to on-air listenership, with typical station numbers at 50:1 or higher.
- BALANCE** Public media's greatest management challenge today and for the near future is driving a proper balance (with high temporal granularity) between currently shifting parameters:
- Local vs. National content

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- Real-time vs. On-demand services
- Original vs. Acquired/shared content (“co-opetition”)
- Mission vs. Monetization

Any “reinvention” of public radio should be done incrementally, with a careful weighing of institutional priorities against the advantages or disadvantages of each prospective new approach.

PROMOTE	Aggressive promotion via traditional and new venues is increasingly important. Perhaps the best area to explore is partnerships with “best of field” organizations, where mutual benefits can flow (<i>e.g.</i> , Google, Starbucks; certain national magazines; local newspapers; large local employers).
ENGAGE	Encourage and assess audience reactions; get representation from all demographics; learn, adapt and grow. Hire smartly (ex-print people are one opportunity – much of the NPR News brand was built this way, taking strong print journalists and teaching them the craft of aural storytelling). Invite listener feedback and participation through social networks and new venues of consumer access.
STUDY	Keep abreast of all relevant and peripheral new technologies. Consider them both for the appropriateness of their inclusion within your services, and for their potential impacts if implemented by competitors. Develop stable metrics or benchmarks by which to evaluate new opportunities.
MEASURE	Watch the changing audience numbers closely, with special attention to the Diary/PPM shift as it continues. Weight respective metrics (on-air and online), and establish credible analysis algorithms. Remember to account for behavioral shifts that may occur as audiences age: These may proceed differently or faster today than in the past, but they will occur.
FOLLOW FAST	Public media does not have a mandate to be ahead of the curve. A “fast follower” position is preferable. Maintain good vision ahead to know what’s coming. Always keep aspirational targets in sight. Be open to big new ideas, but don’t rely on them for <i>deus ex machina</i> events. Scale well.
DEVELOP	Remember that compelling content always trumps delivery technology. If you provide something listeners want to hear, they will find their way to it, however cumbersome. Conversely, the most convenient and up-to-date media-access methods are of little value if they provide no interesting content. Thus the true goal in new media for public broadcasters is great content made broadly and easily available . Seek new talent, topics and presentation methods, while maintaining traditional programming. Extend and expand the core.

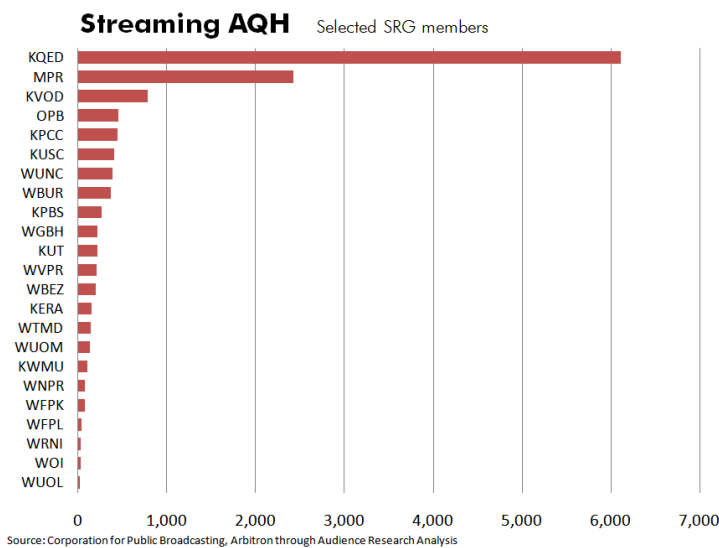
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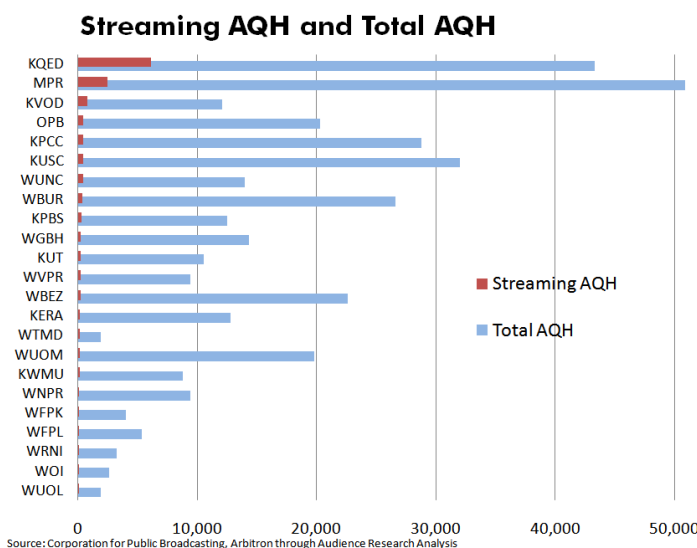
Reality Check

Public radio is now about 10 years along in the networked space. How are we doing? Evaluation of activity on the network is still a work in progress and much debate surrounds appropriate metrics, the strengths and flaws of different measurement vendors and their respective systems, and the “apples-to-apples” comparability (or lack thereof) of online indicators to broadcast measures.

One way to assess public radio’s current performance is to look at the most broadcast-like web application, streaming, using a familiar broadcast metric – the average-quarter-hour audience (AQH)



In this chart we see the average audience online for a number of SRG members who were willing to share their numbers. We can see a couple of stations – major players in our field like KQED and Minnesota Public Radio – to which a significant number of people are listening online. But we also see that there is a pattern of very quick fall off in the use of the web as an online audio delivery system. For most stations, the average online audience is very small.



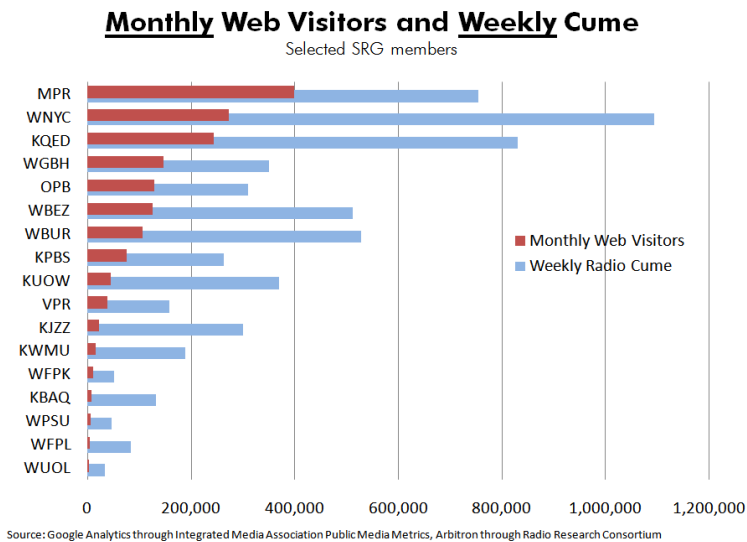
We see this more clearly when we look at listening online in the context of total listening, both on the air and online. The online numbers are small fractions of the total for even the most successful public radio streamers.

When we shared this data with people knowledgeable about and working in the online space, they were quick to point out that the web is not just about replicating the broadcast listening experience. Streaming is currently the most

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used content feature on public radio station web sites. But it is just one of many possible public media applications online and there are many other ways in which people can use and benefit from what we do online, much of which may be based on text and images.



This chart looks at the *monthly* unique visitors to a number of stations' web sites and their *weekly* broadcast cume – each is an indicator of the reach of the platform. We see that some stations are making significant progress in reaching people on the web relative to those they reach by broadcast. We should note that a number of the stations with the largest numbers of visitors are joint radio/television operations (KQED, WGBH, OPB, KPBS) that are using

both of their broadcast platforms to drive traffic to their sites, and that we are comparing the web traffic to their radio audience only.

There are some important caveats in looking at this kind of data:

- Some studies suggest that most people who visit station web sites are also station broadcast listeners. Some stations report a substantial number of visitors from outside their coverage areas. We do not have standardized data on this point across all stations and it is best to think of **monthly web visitors and people in the weekly radio cume as overlapping but different populations.**
- Public Media Metrics, which reported the data on which this chart is based, also reports that **over 70 percent of the monthly visitors to public radio web sites show up only once per month.** In contrast, people in a typical public radio station's weekly cume tune in about a half dozen times per week on average.
- **Most visits to public radio web sites are very short – 10 seconds or less.**

On the national level National Public Radio's npr.org is the most successful public radio site, and claims over 8 million unique visitors per month. During the 2008 election, that number spiked to over 10 million.

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None of these data really speak to the interactive, social networking capacities of the web with which both networks and stations are experimenting. NPR's still-new social networking, the growing number of station Facebook pages, PRX's highly interactive Public Radio Talent Quest, and other applications all produce interesting glimpses of changing dynamics with listeners. But we are a ways from understanding enduring consequences for overall audience use and value.

NPR, other national producers, and many stations believe that the web is central to their future and critical to their public service mission, but they are still searching for ways to translate high-level aspirations into workable strategies and implementation. It is clear that public radio has an enormous distance to travel in realizing its online potential and achieving an impact that begins to approach what has been achieved in broadcasting. In the remainder of this section we explore key steps to begin getting there.

Online Strategies for Stations

We recommend organized and ongoing support for stations in developing strategic clarity about their roles and expectations in the online and mobile networked environment – at the different levels of resources and operations and different phases of development found across the station community.

Many public radio stations began their online work with a website aimed at organizational presence, promotion, and contributions. That never goes away. In today's environment, every self-respecting nonprofit organization needs a companion website. It is basic customer service and outreach.

A second step shifts the focus to content and almost always begins with migration of the broadcast service onto the web – click here, listen now. Streaming is the most common content application that stations provide and the most popular content application for public radio web site visitors. As stations develop more robust service in this phase they add more content choices, such as additional streams, playlists, archives, and podcasts.

At some point the content evolution becomes a paradigm shift, with the one-to-many model of broadcasting opening into a many-to-many dynamic with new models of user control, engagement, and participation. In all the public radio examples to date, broadcasting functionality and support remains central; there is, however, a growing presence of content specifically created for the web, curated content from other sources, interactive features, and utilities that enable users to shape their experience and manage the content they seek. This third phase sets the stage for what some envision as a fully realized, multi-platform public service media company of the future.

The public radio system includes stations at all three of these phases, with most somewhere in the middle. As we develop support, training, and shared plans for online development, it is important to be clear which stage of development is being addressed and which roles are being strengthened. Further,

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while those investing in public radio's online activities often wish to move to the "cutting edge" of the third phase, we must recognize that many stations, including those that have begun third phase explorations, still have much room for improvement in the quality, effectiveness, and use of the earlier dimensions of their online work.

Mark Fuerst, founder of the Integrated Media Association, urges setting realistic expectations about how many stations can move to more advanced and complex levels of online service. In a comment for GROW THE AUDIENCE, he writes:

"All the talk about 'multi media publishing' and 'distribution through multiple platforms' obscures the reality that most public radio stations have a companion website, a stream and, in some cases, an archive of locally produced programs. That's it, and they will be very hard pressed to do more. Why? Because the vast majority of stations are too small to fund the level of staffing required.

"This can no longer be viewed as developmental issue, where large stations, funded by CPB, will lead the way and smaller stations can adopt the best practices discovered by their larger-station colleagues. Even the largest stations with staffs of six to sixteen people working the web are having trouble developing a 'web presence.' One person shops will never follow that model."

This past year PRX surveyed stations that many in the field would consider leaders in public radio web development. A cluster of **issues around strategic clarity surfaced with full force**. PRX observed:

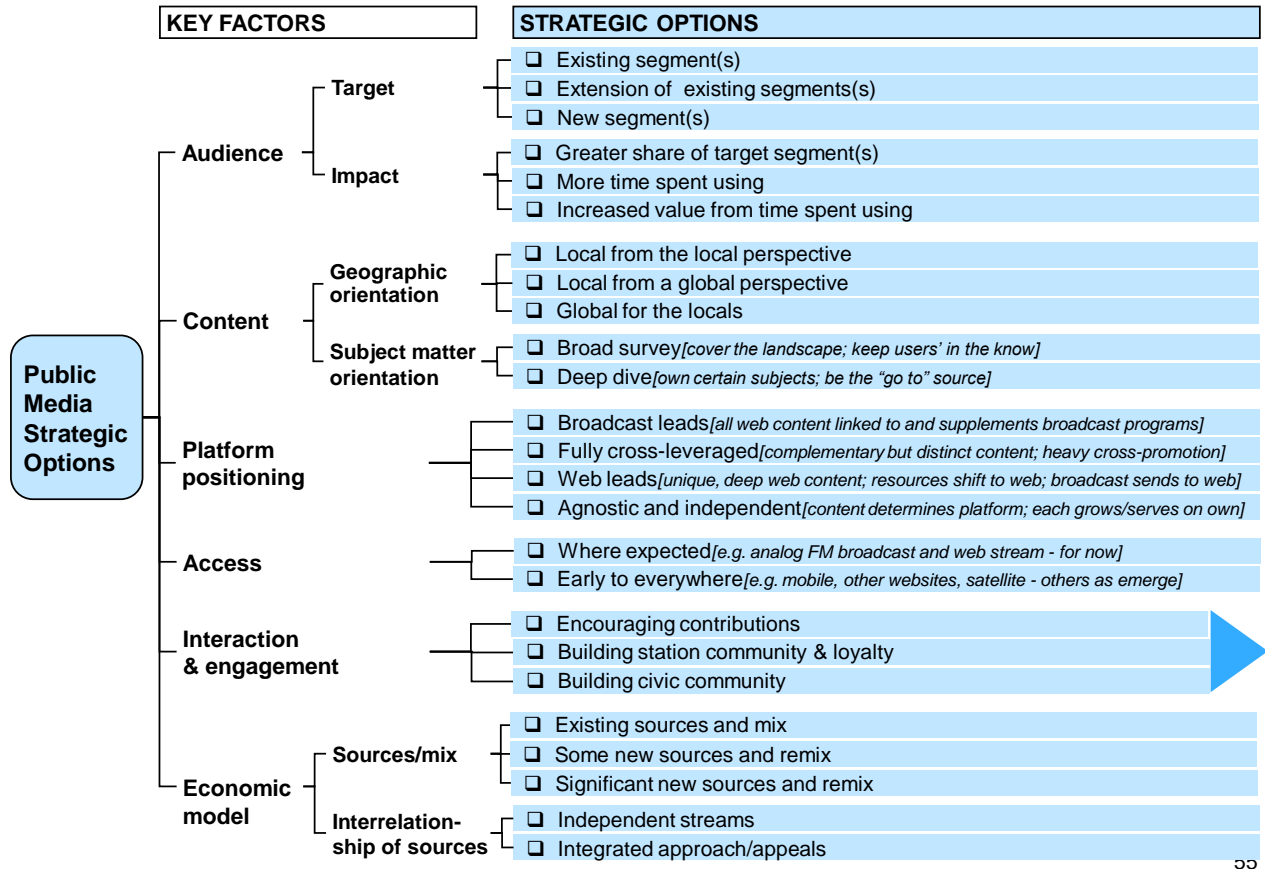
- The "network" is still evolving territory, creating all the more need to take and set bearings. Stations need to be mindful of multiple risks, including chasing trends and picking up tools simply because they are there, taking an online direction misaligned with overall strategy for "institutional significance," and reacting, drifting and dissipating resources.
- Limited resources to invest and as-yet unclear ROI means there are potentially significant opportunity costs of mis-investing in the web.
- Stations face the dilemma of choice – nothing has choices like the web and too many choices can lead to poor choices.
- Limitations of scale and talent at the station level lead to risks of overreaching and poor execution for all to see.

PRX asked these leading stations "**What are your greatest needs for support and assistance over the next two years in developing and managing your online services?**" The top answer, by a substantial

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margin, was strategy development. Consultant Quentin Hope developed an example of a starting place in a strategic planning template. Here’s an excerpt:



Baseline Capacity

We recommend development of a baseline capacity and fluency in the networked environment among all content creation and delivery nodes in the public radio system, with particular emphasis on organizations committed to content that will extend the inclusiveness of public radio.

Whatever strategy an individual station adopts, public radio collectively needs fluency and agility in the online, networked environment. While some of this will happen naturally over time as online “natives” enter the public radio workforce in growing numbers, there is a clear need for significant organizational and professional development.

Get the basic elements right. Stations at all stages of development need to get their online basics in order: easy navigation throughout the site, streaming, search, program schedule, music playlists and

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news archives as appropriate to the station's format, community events, contact information, and accountability and transparency material such as a board member listing, financial reports, and announcements of public meetings.

Learn and use “new media” applications. Stations will strengthen their audience service as they learn and deploy such applications as customizable alerts, membership models, social networks and opt-in pushed content.

Promotion. Public radio has an enormous advantage in building its online services; it can drive traffic to web sites with the powerful megaphone of its broadcasts. But just as stations need organized and effective techniques in promoting their broadcast programs on their own air, they need a promotion plan for their web sites as well.

Findability. Most of us in public radio are amateurs at search and search optimization. Yet search is an increasingly important pathway for getting public radio content in front of users who may have an interest in it. As online content choices continue to explode, findability is a key competitive factor and there are many others working within or alongside public radio's core content franchises who do a better job.

Diverse views and voices. The networked space provides potentially huge opportunities for constituencies that are not now well-served by public radio's main broadcast channels. Problems such as competition for airtime in a single-channel schedule and geographically-dispersed communities fall away. But the opportunities will only be realized if these constituencies, whether defined by interests and tastes in information and culture or demographics such as age, race, or ethnicity, have the capacity to create an effective online public service presence. It will take a conscious, pro-active effort to assure such groups are included in shared capacity building.

“Web Native” Content and Delivery

We recommend aggressive experimentation and development of public service content and delivery methods explicitly designed for a digital, networked environment.

Most of the content public radio offers on its web sites and other networked platforms is repurposed from broadcasting. This is a natural evolution for the field, leveraging existing content assets and considerable investments already made in them into new delivery channels. It speaks to oft-cited user demands for content “when I want it, where I want it, and on the device of my choosing.”

Many of those with whom we consulted urge public radio to complement the “export to the web” approach with investments in **content that is “native” to the network space** into which we are moving. Such content could range from “web only” audio features that go deeper or further than broadcast material or text and image material.

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A second recommendation in this area is to rethink how we **organize our content for networked use**. Currently, much of the content public radio presents online is organized in ways that reflect its broadcast origins, by network, source, and show. Instead, it is suggested, public radio should organize content around topical themes, such as government, science, culture, health, and so on, integrating material from multiple sources and presenting it in a way that better aligns how users will be seeking it. These steps introduce potentially difficult issues around branding, identity, and relationships with content suppliers that will require careful deliberation.

A third theme might be summarized as **distribute everywhere**. NPR's Dennis Haarsager refers to "distributed distribution," as epitomized by NPR's API that makes it possible for both stations and others to present content from npr.org on their own web site. PRX's Rekha Murthy, in a GROW THE AUDIENCE essay "Distribution as Promotion," urges public radio to decouple content from its place of origin and push it out to reach people in many and surprising ways. And then let that content lead people back to stations and networks.

The exhortations to distribute everywhere increasingly include **new mobile platforms**. This seems a natural extension of radio's traditional strength in portable/mobile usage. The Public Radio Player, a collaborative effort to develop and support an application on Apple's iPhone that plays public radio streams is one such example.

While all these possibilities are potentially important, many of them feel out of reach for a large number of stations and producers. To address that issue, national and station leaders have explored several possibilities for a **shared public radio digital distribution infrastructure**. Among the services proposed for such an initiative:

- Systems and tools for providing on-demand access to signature, local, and "long-tail" public media programming via station websites.
- Back-end support for stations integrating local and national underwriting and sponsor spots in audio, video and on web pages.
- A packaging and curating service for surfacing, promoting and presenting relevant, timely and diverse digital content.
- A critical mass of activities to drive the development of shared standards, best practices, and metrics across the system.
- A business development and licensing role on behalf of a broad range of content providers seeking presence on third-party sites and services (such as iTunes and mobile platforms).

To exploit the unfolding options "web native" content and delivery, **public radio needs a rights framework that supports public service goals and purposes**. There are rights held by "outside" providers, such as the composers and performers of recorded music and the music labels, some of which have their own online aspirations. There are also rights issues within the field, such as the terms

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under which stations can present programming they have licensed for broadcast over other distribution platforms in ways other than a simulcast of their on-air service. For public radio to deliver on new platforms the same kinds of diverse and robust content that have been its signature over the air, it must have comparable rights, flexibility, and economic sustainability.

The Natural Networks of Our Audiences

We recommend investments in pilots and demonstrations that exploit the community-building potential of the network to strengthen public radio's content, "create publics" around issues and interests in communities, and leverage the resources that surround public radio stations, producers, and audiences.

Public broadcasters used to talk about outreach; the current term of art is engagement. But neither quite gets it right in terms of public radio's unfolding opportunities to build on the natural network of our audiences – the connections and affiliations that already form a web among those we serve.

The Berkman Center at Harvard talks about public participation in the media. The Center for Social Media at American University talks about public media "creating publics" around issues and interests in our communities. Others talk about leveraging the publics and the resources that are all around us through social networking tools. These are all dynamic and evolving processes, bringing the audience – the public – into the creation of content and services, taking the creation process out into the community to engage with the audience in different ways, and connecting members of the audience to one another.

This is a change of roles for many in public radio who are used to working inside our organizations and behind the glass of the studio, broadcasting one-to-many. This territory is a many-to-many relationship. While there has been good early discussion around these issues, the realities of moving forward to a day-to-day operating reality across the whole system of public radio is an enormous challenge.

These emerging services and partnerships significantly engage multiple voices, include contributions and ideas from outside sources, and may bring a different set of editorial expectations than for programs which stations broadcast on their principal channels. Yet part of the power of these services and partnerships is that they carry forward public radio's brands and imprimatur. Stations need a more refined set of guidelines that will inform their staffs and their public and ensure a continuity of values, trust, and organizational clarity in these new and evolving applications.

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The Long Term View

With each passing year the impact of the networked environment on public radio's audience service will increase. Public radio has the opportunity and responsibility to begin reimagining the role of stations and national producers, not with the certainty of prediction, but as a mapping of strategic intent and possibility.

Task Force member Laura Walker, President of New York's WNYC, set out one such imagining as follows:

"As stations, we need to have the courage to define ourselves not primarily as distributors of content and start more proactively conceiving of ourselves as creators of multiplatform content and conveners of a new kind of conversation in our communities. As national producers, we need to create radically new partnerships with stations, other nonprofits, newspapers, and internet sites, and do a much better job reflecting the American experience and driving a more full American conversation. Collectively, we need to be in the places that the audience is.

"It is inevitable that the distribution part of our work will become less important every year—our radio antennas, satellite, distribution of programs to stations. While distribution will not disappear overnight, it will become increasingly less vital. It is of course impossible for any report to predict exactly how and when this will happen. However, I am certain that the audience on radio vs. web will look drastically different in five years than it does today. . . it is critical to our work to acknowledge that the digital audience is the audience of the future."

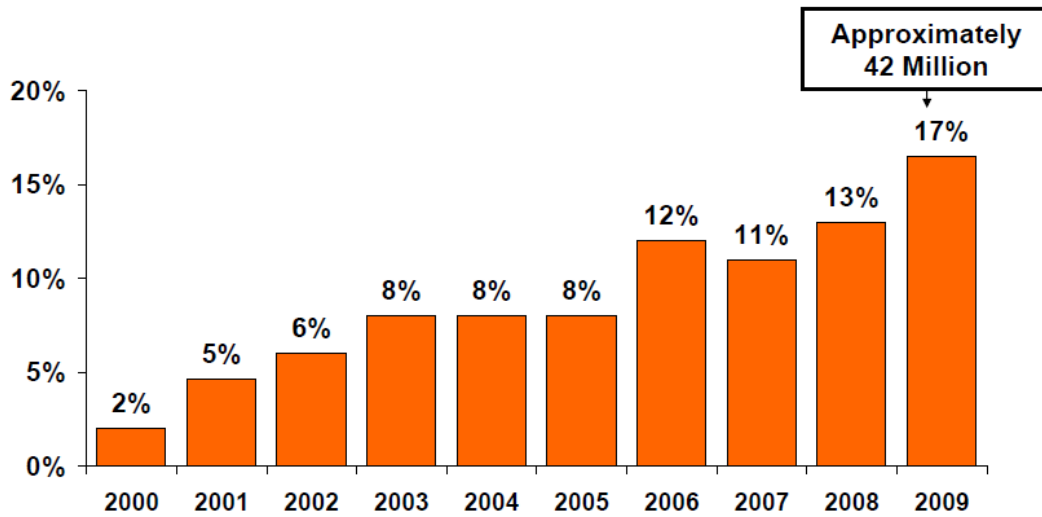
"Once we acknowledge this, we stations realize that we need to radically redefine ourselves. Many stations define their most important public service as offering listeners access to the great journalism and programs by NPR, APM and PRI—but that content will be available directly on the web, and more and more people will turn to it there.

"So stations need to transform from within if we don't want to end up like newspapers. I believe this is a great time to redefine the public radio community in a digital space as community content creators – conveners and journalists that not only chronicle our communities, but invite others to do the same. By putting content first, this will free us up concentrate on the substance. But to do this, we will need to readjust our budgets, reallocate resources, and get better at raising money. We will need to create digital-only content and distribute and market on the web where the audience is. Let's organize, aggregate, curate and impact the American conversation. "

This is a perspective at once inspiring and challenging. More of us need to push our own long term views forward in a similar way.

Weekly Online Radio Audience Up by Nearly One-Third in Last Year

% Who Have Listened to Online Radio in Last Week



Base: Total Population 12+



From *The Infinite Dial 2009*, Arbitron, Inc. and Edison Media Research.

5. Market Strategies, Station Solutions

Improve existing stations and develop new services in the top 50 markets designed to increase the availability of multiple, focused, and differentiated high-performing public radio services.

Seven of the top 50 markets do not have a full-time public radio news station, 16 have neither a public nor commercial classical station, 27 have no full-time public radio jazz, and, depending a little on how one counts, 40 do not have a full-time public AAA station.

Among the markets that have multiple stations with different services, public radio does well in some and less well in others. Some of the differences are due to market characteristics that influence the amount of public radio listening – education levels, values, and lifestyles principal among them. But after close analysis accounting for market factors, differences in public radio performance across markets are significant.

Public radio is most successful at aggregating audiences of both significant size and significant diversity when it presents multiple, focused, and differentiated services. Yet in many of the nation’s largest markets public radio does not have enough full-powered stations to deliver all of its signature formats, let alone new or innovative services that would speak to different audiences.

In the earliest years of developing the public radio system, CPB funded coverage expansion initiatives that targeted specific markets without a public radio station. CPB provided financial support and planning assistance to organizations that stepped forward to launch a service. In a second wave of expansion, CPB committed up to \$1 million in special support to top market stations that were prepared to make major upgrades in their organizational capacity and service.

We recommend an expansion initiative for a new generation of service – a broad-based, collective effort by stations, networks, and funders – crafting station-specific solutions and making targeted investments in markets where the current level of public radio performance indicates significant opportunities for audience growth.

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Options in the Top Markets

The nation's 50 largest radio markets account for over 60 percent of all current public radio listening. Looking forward, these markets also present the greatest opportunities for growth in the total number of people using public radio, for significantly increasing listening by people of color, and for developing new, self-sustaining services.

We recommend three key approaches in the top 25 markets that will strengthen public radio's performance.

“Realign” existing stations by significantly improving the way formats are organized and presented across stations – with the priority being those markets in which public radio's most successful formats are not presented in a consistent and focused manner. An example is Washington, DC, where, over several years, WAMU and WETA moved from each providing a news- and-music service to respectively offering all-news and all-classical formats.

Develop new services on existing public radio stations. Examples of this approach are Milwaukee, where jazz was replaced with a format aimed at younger listeners under an operating agreement, and Los Angeles, where an initiative is underway to develop a new service targeting a younger, predominately Latino audience.

Create opportunities for new services by either gaining control of stations through acquisitions or operating agreements, or by upgrading limited coverage signals. Miami has a classical service after American Public Media purchased a religious station. KXOT in Tacoma reaches more listeners in the Seattle-Tacoma market because Public Radio Capital purchased and upgraded the signal, which is now operated by Puget Sound Public Radio.

We recommend approaches in markets 26-50 that center on differentiating services on existing stations and adding stations with full market coverage through upgrades or acquisitions.

Better performance by the top ranked public stations. In markets 26-50, the median performance of the first and second ranked public radio station is below that of the first and second stations in the top 25 markets. This warrants analysis of market factors to gain better understanding of performance expectations and an effort to strengthen the performance at these stations.

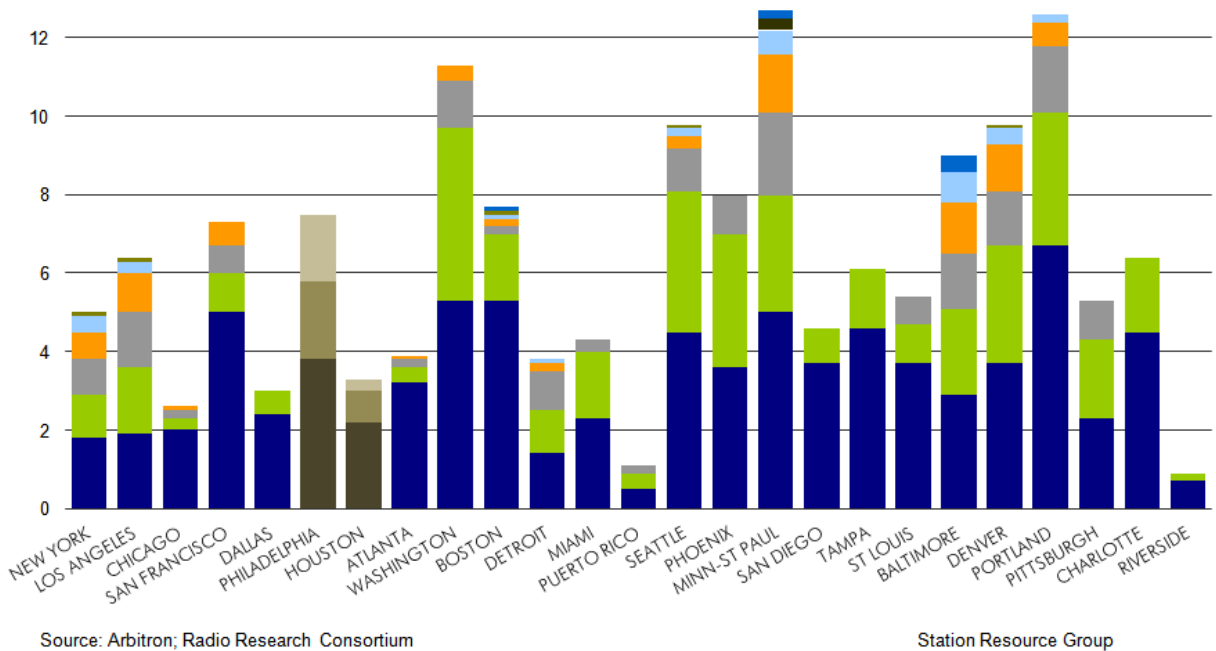
Upgrade or add new stations to achieve more stations with full market coverage. Third and fourth-ranked public radio stations in markets 26-50 are often distant cousins, broadcasting from locations (typically university campuses) well outside the core of the market.

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Public Radio's Share of Listening: Top 25 Markets

Metro Survey Area, Spring 2008



This chart shows the share of radio listening claimed by CPB-supported public radio stations in the top 25 markets. Each segment of a bar represents a different station. Not all of the stations are “home” to the respective markets. In Washington, DC, for example, public radio accounts for 11.3 percent of all radio listening. This combines WAMU (5.3%), WETA (4.4%), and WPFW (1.2%), all of which are based in Washington, plus a small amount of listening from WBJC (0.4%) in neighboring Baltimore. Philadelphia and Houston are presented in a different color pattern because audience estimates for those two markets are based on Arbitron’s metered technology rather than the diaries used elsewhere – diary and PPM produce somewhat different results.

The chart highlights important differences in the performance of public radio in different markets and some of the multiple factors at work. For example, there are significant differences in the share achieved by the top performing public radio station in different markets – look at San Francisco compared to the markets that bracket it, Chicago and Dallas. There are also some markets in which public radio is available over multiple outlets and others where only a couple of stations carry the flag.

In general, more channels translate as more service. There are other factors, however, that have to do with the character of the markets themselves. Some markets have more of the kinds of listeners who are attracted to public radio than other markets. GROW THE AUDIENCE took a first crack at sorting this out in *Situation Analysis*, the project’s first research report. Having documented the strong appeal of public

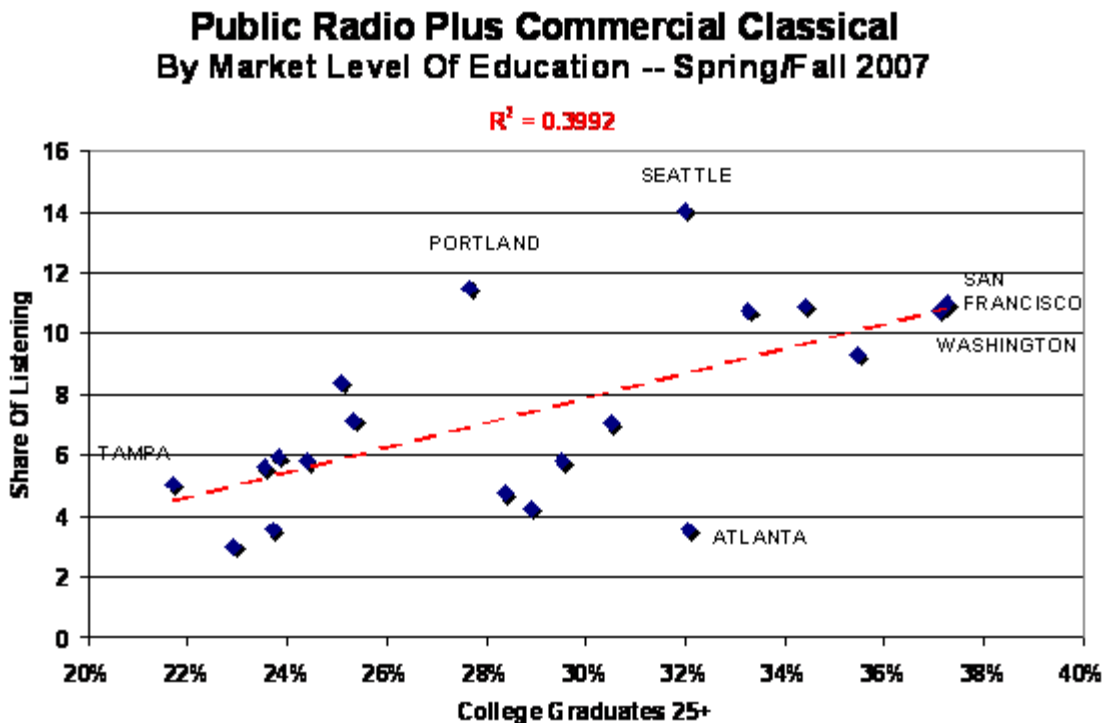
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radio's programming to educated listeners, GROW THE AUDIENCE used education levels in top markets to predict listening. In preparing the analysis, we included commercial classical stations along with the public stations because other research has indicated that public and commercial classical music stations occupy essentially the same market niche and that listeners think of them in very similar terms.

The analysis, presented in the chart below, shows that education alone predicts 40 percent of the market-to-market variance. Most of the markets fall close to the regression line. For example, Tampa has a low level of education and a low share for public radio. San Francisco and Washington also fall right on the line, each market enjoying high education and strong "public" radio share, including commercial classical KDFC in San Francisco.

There are some markets that, in this analysis, appear to be significantly over-performing or under-performing.



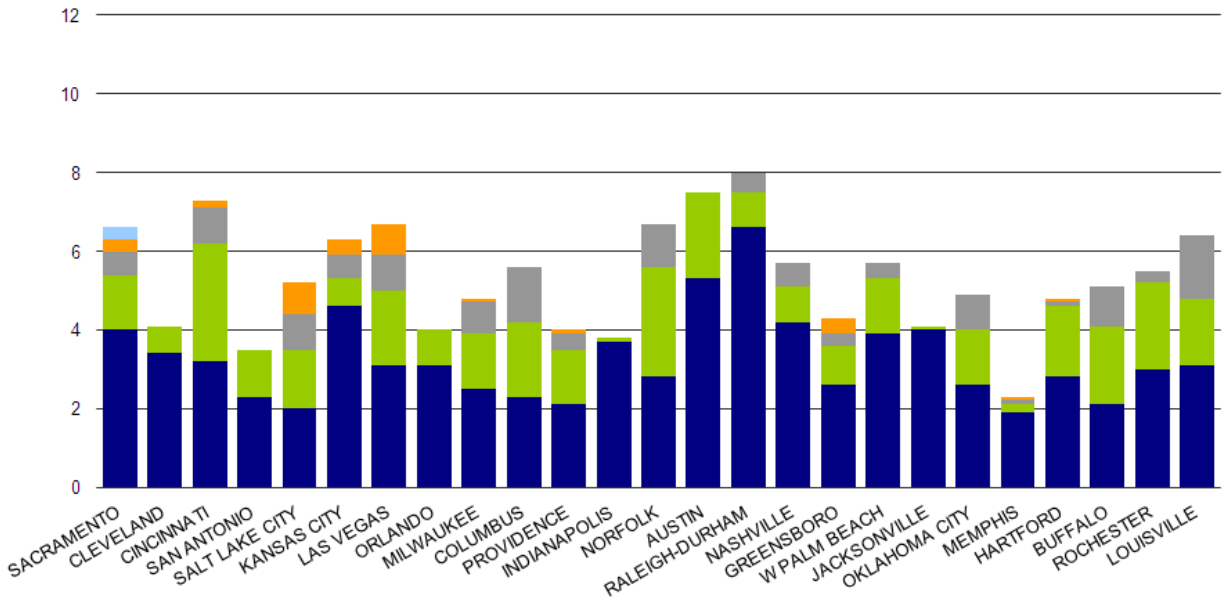
The source for education data is the 2000 US Census by its definition of metropolitan areas – not exactly the same as Arbitron's metros. Education is the percent of persons age 25 or older having attained a college degree. The share of listening is the combined share of all public radio stations and commercial classical stations, averaged Spring and Fall 2007 -- AQH persons 12+, Monday-Sunday 6am-12m. Arbitron estimates and data are copyrighted by and proprietary to Arbitron, Inc.

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Public Radio's Share of Listening: Markets 26-50

Metro Survey Area, Spring 2008



Source: Arbitron; Radio Research Consortium

Station Resource Group

This chart presents the performance of public radio stations in markets 26 through 50. The first and second-ranked stations in these markets have, on average, lower shares than their counterparts in the top 25 markets. Many of the third and fourth-ranked stations in this chart are broadcasting from outside of or at the edge of the market.

We recommend market-by-market analysis that extends GROW THE AUDIENCE’s market and format specific work, incorporating additional variables, particularly values and lifestyle indicators such as SRI’s VALS system, to sharpen the understanding of which markets present the most important opportunities for audience growth.

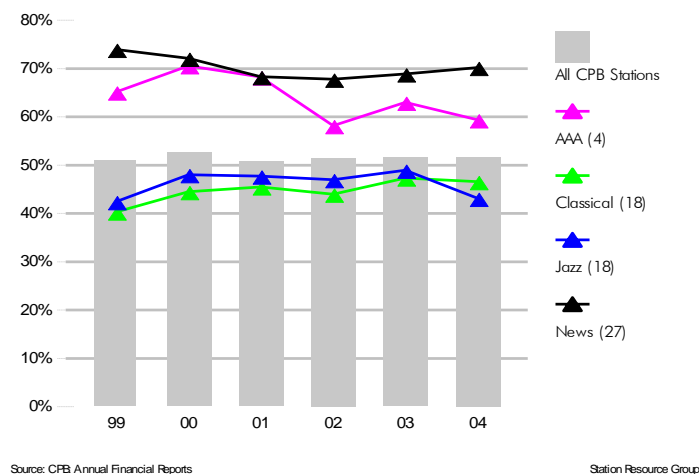
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Public Radio in the New Network Age

A second critical dimension in crafting market and station solutions for audience growth is sorting out how to pay the bills. Just as formats differ in their audience service, they also differ in the dynamics of financing them.

Across the public radio system, about half of stations' non-fundraising costs are covered by the net proceeds from listener and business contributions, underwriting sponsors, and competitive grants. The other half comes from universities, colleges, and state and local government – as both direct funding and indirect support – and from CPB's station grant program.

**Net Fundraising, Underwriting & Grants
As a Percent of Total Non-Fundraising Costs**



But there are important differences among formats. This chart from SRG's *Public Radio Format Study* shows that news stations were able to cover 70 percent of their non-fundraising costs through net proceeds from their community-based development efforts. AAA stations covered 60 percent. In contrast, classical and jazz stations, as a group, depended on various institutional and governmental funders for over half their non-fundraising operating costs.

Both the audience performance and financial performance mapped above are relatively stable over time and thus very useful for planning. But they are also a reflection of current services as currently delivered. If public radio aggressively pursues different kinds of listeners with different kinds of programming, as recommended elsewhere in this report, it will be important to anticipate different results on these key metrics.

Through public radio's first decade, for example, as many as seven out of ten dollars supporting the service came from tax-based sources at the local, state, and federal level. It was only as services matured and focused, found their voice and developed their audience appeal, that stations were able to turn to their broader communities for significant levels of contributions and sponsorships. We should anticipate similar arcs of development for new services and plan accordingly.

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Public Radio in the New Network Age

Acquisitions, Operating Agreements, and Mergers

An important dimension in public radio's growth has been accomplished through acquisitions, operating agreements, mergers and creative signal coverage solutions. Continued public radio growth can be achieved by reinforcing these strategies, along with targeting new audiences, developing new formats based on savvy, market-driven approaches, and strong and complementary online services.

Acquisitions

Acquisition of noncommercial stations from established licensees – through outright purchase – once seemed a remote option for increasing (or preserving) audience service, especially in larger markets. Over the past 10 years, however, such transactions have played an important role in public radio's audience growth.

Early in public radio's development, a handful of organizations such as Minnesota Public Radio and Buffalo's WNEB pioneered adding stations and delivery capacity through purchasing stations. In the late 1990s, public radio's attention focused on a transaction going the other way – the prospective sale of a full-power public station in Washington, DC to a religious broadcaster. These and other transactions, both those realized and those missed, underscored the need for a more organized and aggressive management of an emerging noncommercial station marketplace to both protect and advance public radio's assets and delivery capacity. The Station Resource Group, with support from CPB, the Surdna Foundation, and a major donor, developed and launched Public Radio Capital as a nonprofit entity to take on this role.

Since its founding in 2001, Public Radio Capital (PRC) has emerged as public radio's most widely used resource for station transactions. There are many public radio acquisitions and management agreements that have been negotiated by others over the past decade, but the PRC "story" offers a focused window on this activity and a careful collection of the associated audience data.

PRC has worked with more than 200 public radio organizations ranging from first time station owners to the largest, multi-channel public radio operators in the country. In the past seven years, PRC has completed transactions totaling more than \$170 million. Thirty-one transactions have helped public radio stations expand their signal reach or differentiate their services. The stations involved in these transactions provide a signal to more than 33 million people. As of Spring 2008, Arbitron data indicate that these changes in service increased public radio's average audience (AQH) by 21,400 listeners.

Over the same period PRC worked to preserve seven additional public radio stations that would have otherwise been sold outside public radio, most likely to religious broadcasters. In these cases there was a sale or operating agreement between one public radio operation and another. As a result, public radio avoided a potential loss of approximately 19,700 listeners in its average audience. These seven

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stations are now operated by new management teams are uniformly demonstrating stronger financial and public service performance – by Spring, 2008 these stations increased their average audience by 7,400 persons since the respective acquisitions.

The combined gain of 28,800 average listeners from the 38 projects with which has PRC worked represents 15 percent of the total growth in public radio’s average audience from 2001 to 2008. If we add in audience growth attributable to acquisitions and management agreements brokered by other organizations during the same period, the role of acquisitions and management agreements in public radio’s recent audience growth becomes even more significant – perhaps 20 percent or higher.

About the Financing

Station acquisitions are usually major transactions relative to the annual operating budgets of the purchasing station organizations. They require long-term financing and the assumption of some risk. The scale, duration, and risk of these arrangements have often been both practical and conceptual barriers to public radio moving forward.

Some organizations have been able to manage this process on their own, such as through “internal borrowing” with parent organizations such as universities, through commercial borrowing, or through community fundraising. Public Radio Capital has strengthened the system’s overall debt management capacity and extended their expertise to less experienced new entrants. PRC also launched the Public Radio Fund to offer low-cost financing options for public radio organizations to assist in the financing of their short-term capital projects. Launched in October 2007, the Fund now has nearly \$9 million in loan commitments from various foundations and individuals.

To give context to the debt service associated with acquisitions, we can look at ten PRC public radio projects. By the end of 2008, the cumulative debt serviced through these transactions is expected to reach \$15 million. As an example of debt on an annual basis, six stations serviced \$3.4 million in debt in 2007 and \$3.5 million in 2006. Annual debt is being paid out of station operations (listener and underwriting revenue) combined in some cases with major gifts and capital contributions.

Acquisition transactions are rarely “slam dunk deals.” Debt service can be a large continuing obligation in stations’ budgets and can displace other strategic investments; financial covenants with lenders can impose unaccustomed constraints on decision-making. Cash flow projections are tied to audience service projections that may not be fully realized.

Operating Agreements

Operating agreements, in which one entity takes responsibility for managing a station licensed to another, are playing an increasing role in the evolution of public radio services. These relationships are attractive to the parties involved for several reasons:

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- The organizations holding the station license can divest themselves of most operating responsibilities and financial obligations while preserving the asset of the broadcast license and assuring continued public service operations.
- The organization agreeing to operate a station gains control of a broadcast facility without incurring the capital costs of a full acquisition.
- Operating agreements for stations held by larger institutions can provide an opportunity for stations to “flex their wings,” developing a stronger, more independent identity, recruiting civic leadership, and pursuing new sources of funds.
- Operating agreements can be an intermediate step leading toward an eventual acquisition, providing an opportunity for the licensee and the operating entity to manage the transition in control over time and for the operating entity to assemble the resources needed for a full acquisition.

Looking forward, public radio now has a substantial track record of successful operating agreements in a variety of markets and with a variety of particular arrangements.

Mergers

Over its entire history, public radio has seen relatively few outright mergers, in which two or more separate entities combine to form one new one. Cleveland’s IdeaStream, which knitted together a public radio station and a public television station, is a rare example. But there have been several circumstances in which a new entity has been created by several licensees to take responsibility for operation of their respective stations. Examples include Coast Alaska, Prairie Public Radio in North Dakota, Louisville Public Media, and Iowa Public Radio.

We believe there will be more such arrangements in the future, but it is difficult to predict where and when they will emerge. We encourage public radio’s national organizations and funders to take an opportunistic and supporting role in assisting organizations pursuing this path.

Current Prospects

The current economic environment creates risks, opportunities, and challenges in the noncommercial station market. For example, educational institutions, which own 6 out of 10 CPB-qualified stations and roughly 600 other NCE institutional licenses, will increasingly seek financial relief from the obligations of owning and operating noncommercial stations. Waning tax revenue will increasingly force institutional licensees to put more stations on the market and public radio must keep a close eye on these developments both to protect and expand audience service.

These circumstances will put a number of current public radio services at risk. But they may also create opportunities for organizations in more robust financial health to acquire or operate stations on

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favorable terms. That will in turn lead to more public media service differentiation that will contribute to listener growth and loyalty.

The value of noncommercial radio assets has not yet diminished in the current market – largely due to the relative scarcity of NCE licenses and ever-present demand by religious broadcasters. A related issue is the availability of credit to finance station acquisitions. PRC reports that a number of lenders remain interested and able to finance public radio transactions. Part of that interest stems from public radio's strong listener and revenue growth, as well as stations' good standing for loan repayment. But transactions may require multiple lenders and borrowers should anticipate closer scrutiny than in the past as the credit markets remain fragile.

Investment Requirements

The investment required for market solutions that involve acquisitions will require coordinated planning of grants from major foundations and CPB, loans from PRC's new Public Radio Fund for short-term capital, and identification of other sources to support longer term financing. To make a significant difference to long-term audience growth, public radio will need to galvanize short-term investments over the next three to five years for market solutions in a handful of top markets. To take full advantage of market acquisition and management agreement opportunities, public radio needs to be agile and quick. That will require access to financing in ways that will allow multiple deals across the public radio sector to happen simultaneously. Grants, loans, or other forms of investments of between \$150-200 million, roughly the amount of business PRC has transacted since its inception, would be a meaningful and, more importantly, sustainable investment towards audience growth. This investment could be financed in part out of existing station operations that are organized for maximum efficiency in maximizing service, managing costs and generating revenue. These investments must be supplemented by significant grants from foundations, major contributions from individuals, and support from CPB.

Many will find these to be daunting figures at a time when stations and networks alike are cutting budgets, staff, and programs. However, the long-term vision of such an investment is to expand audiences for existing public media services and to drive the development of vital new services that will affect the lives of hundreds of thousands of people in the years to come. Public radio companies that operate multiple channels with distinct formats also achieve greater recognition in the local marketplace – “community institutions” that deliver multiple services – and will have more channels from which to derive larger audience and subsequent support from those listeners.

HD Radio

Public radio has invested heavily in conversion to digital broadcasting. About 70 percent of public radio's 900 transmitters are now broadcasting a digital signal or are in the process of converting. One driver of that investment has been the desire to offer a high-quality digital signal that will compete with digital offerings from satellite radio and online services. Within public radio, much of the interest has

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been the prospect of offering second and third services on HD2 and HD3 channels. National Public Radio's NPR Labs has played a leading role in developing and promoting this multi-channel capacity. Digital radio broadcasting technology is still being perfected as it is deployed in the field. While conversions have proceeded smoothly in some areas, a number of stations report significant degradation of coverage, compared to their analog service, at currently authorized digital power levels. The FCC is now considering proposals for higher levels of digital power to remedy these issues, but must consider inevitable interference that increased digital power would cause to analog broadcast signals.

Adoption of digital radio by consumers is lagging far behind projections touted only a few years ago. Prices have dropped recently but the receiver manufacturing industry has continued to position digital receivers as a costly premium product. Current estimates are that total receivers purchased to date are in the 1.5 million range.

If digital radio achieves success in the consumer marketplace, the availability of multiple channels from each station will change the radio landscape in dramatic ways, moving broadcast radio further in the direction of segmented, specialized channels. It will allow public radio to offer whole channels of services to which stations now devote only a portion of their time and to feature programming that currently struggles to break through onto station schedules. But we are some distance from such scenarios today.

For the near-term, HD2 and HD3 channels are not a viable choice for the presentation of multiple, differentiated services aimed at reaching measurable audiences. Some stations are using the channels in conjunction with online streams and for format experimentation. As receiver penetration increases, stations will look to "ultra-niche" services and innovative financial models to develop sustainable HD2 and HD3 service plans.

6. Marketing

Develop listener-centered marketing principles and practices within public radio in which stations engage with listeners throughout the planning, design, development, and presentation of programming and services.

Throughout GROW THE AUDIENCE consultations marketing repeatedly surfaced as a collective blind spot in the field, often confused with advertising, promotion, or even underwriting sales. Yet a growing number of leading public radio organizations (and many elsewhere in the nonprofit sector) have expressed the belief that their long-term institutional success, including the ability to attract a more diverse audience, will be advanced significantly through developing their organization's marketing expertise and capacities. Most everyone in the field, including our most advanced stations, agrees that marketing is important and feels they have much to learn in strategically integrating marketing into their institutional skill-set.

Current State of Public Radio Marketing

In the fall of 2008 DEI conducted a member survey focused on marketing issues and activities – 97 stations, reflecting a range of audience and budget sizes, responded. Among the findings:

- No two organizations define marketing the same way. Many stations understand that marketing is a very broad term when used generally, but most employ narrower definitions when developing job and department responsibilities.
- Public radio marketing is overwhelmingly tactical rather than strategic.
- Staff with marketing responsibility wear many hats and lack training – barely half have formal marketing training or experience outside of public radio.
- Marketing efforts are neither goal-driven nor measured. Over two-thirds of the respondents reported that they have no specific marketing goals for listening or listeners to their terrestrial or digital signals, for web usage, or for event attendance.
- Little resource beyond staff is dedicated to marketing.

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Recommendations from DEI and PRPD

DEI, public radio's fundraising and marketing services organization, convened a working group of its board and executive staff to advise GROW THE AUDIENCE on the contributions to audience growth that could be made from within its professional disciplines and for which DEI might take particular responsibility. To give shape to their discussion, the group used a definition of marketing developed by Professor Philip Kotler of the Kellogg Northwestern Business School:

Marketing is the process of planning and executing the conception, pricing, promotion and distribution of ideas, goods and services to create exchanges that satisfy individual and organizational goals.

Kotler, the author of many marketing textbooks, suggests that major elements of a marketing program include marketing research, marketing strategic planning (goal setting, priority selection and resource allocation), target audience selection, positioning, branding, advertising, direct marketing, personal selling, sales promotion, resources provision, public relations, and publicity.

The DEI working group concluded that:

“Public radio at all levels must emphasize overall strategy, and implement marketing principles and practices that stem from that strategic direction. The strategic direction, in turn, must be inclusive of the needs, wants, and attitudes of those demographic groups that are essential to growing the audience beyond current constituencies, such as African-Americans, Latinos and younger listeners.”

The group recommended key steps moving forward:

- Create opportunities for stations to access both strategic planning and marketing planning expertise.
- Help station leaders incorporate marketing principles and practices into their strategic planning and operations.
- Define a framework through which stations can take advantage of these turbulent times by responding to the needs of their current audiences and emerging audiences.

The DEI working group recommended that DEI take responsibility for much of this work, but said that the effort should extend across all professional disciplines and encompass work by all national organizations serving public radio.

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PRPD, the Public Radio Program Directors Association, also formed a working group to advise GROW THE AUDIENCE and to shape its own agenda for supporting public radio's audience growth. The PRPD group flagged marketing as one of its top priorities for audience growth and recommended that public radio and PRPD "Imbed marketing as a core skill and essential ongoing activity at stations."

The PRPD group sketched a preliminary list of activities in this area, including research to identify the most cost-effective options, with a focus on relatively low cost and station-doable approaches. They also suggested looking outside public radio for expertise:

"Engage smart, hip, leading-edge marketers with experience developing advanced, community/network-oriented, high engagement, new media based approaches (e.g. from political campaigning) "

Finally, the PRPD group also recommended that PRPD and DEI "break down the silos" and work together and with others.

Moving Forward

We recommend creating a better alignment of public radio's services with listeners' needs and interests and a greater awareness of public radio's services and benefits through a multi-organizational, multi-year effort to build public radio's marketing expertise and activities that incorporates the following tactics:

- The different definitions of marketing that surfaced in DEI's survey of the field and in the DEI and PRPD working group discussions underscore that a multi-organizational effort to accelerate public radio's marketing will be more effective if it begins with a mutual effort to set out principles, definitions, purposes, and measures of success.
- Support stations with strong tactical ideas and accessible, practical, scalable resources, training and tools. Encourage best practices and share success. It is important to meet the station community "where they are" with respect to resources and staffing for marketing.
- DEI is a natural leader in exploring partnerships with agencies, consultants, and organizations (e.g., American Marketing Association) to expand the currency of marketing within public radio at the industry level. PRPD is a natural partner in this leadership given the perception of strong relationships among marketing, community engagement, and programming services. Public radio's national networks, with substantial marketing needs and investments of their own, may also play a role here.
- At the station level, DEI, PRPD, and the networks should create tools to help stations assess their needs and effectively engage outside marketing expertise in their local efforts.

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- Marketing in public radio needs to be informed by marketing expertise and experience beyond public radio. Public radio has a strong predilection for addressing problems by talking to ourselves, a reluctance to draw on expertise from other fields, and a fondness for inventing our own wheels. In the marketing arena, public radio's skills are so limited and the expertise of others – including many in the nonprofit sector – are so great that public radio cannot afford this indulgence.
- While some outside expertise may be available on a *pro bono* basis, this is an area in which public radio will need to invest to capture what it needs.

And PRX exhorted GROW THE AUDIENCE to be mindful of the particulars of marketing in the networked space: “Marketing ties to Search and Google adwords. One simple recommendation is for stations and other public radio site owners to get the Google Award grants that PRX and many other have – a \$120,000 per year value if used to its fullest extent.”

We further recommend two specific initiatives that follow on the DEI and PRPD recommendations:

- A collaborative project among DEI and PRPD to develop their respective organizational capacity to conduct training and/or support collaborative efforts at their member stations, and to increase their own understanding of how marketing is most effectively integrated into their station support activities.
- A program track in the Public Radio Development and Marketing Conference over the next three years devoted to the concepts, practices, and benchmarks of successful marketing with companion conference sessions conducted at the PRPD annual conference.

7. Support for Stronger Service

Foster more compelling public service by supporting organizational and professional development and research that advances the recommendations of this plan for more inclusive service, differentiation of services within markets, innovation in news and music, and aggressive expansion of activity in the networked space.

Public radio's evolution to a new level of audience service will be led by stations, national organizations, and new public radio media partners committed to innovation, change, and growth. The individuals and organizations who will shape the next arc of audience growth share a restless urge toward something larger and more significant, legacy media and new media in a single package. They are ready to engage with their communities full on – to serve, to learn, and to capture the support that will fuel their plans.

Most of the recommendations in this plan for audience growth turn on concrete and continuing action across an array of organizations, professional disciplines, and activities. We think of the work ahead as a campaign for change that will have several key organizational features:

- **Coalitions of the committed** – those ready to act in meaningful ways. While funders and regulators can offer “carrots and sticks” to shape behavior, the change public radio needs must come from within our stations, networks, and producers. Not everyone will participate. Audience and resources should move toward those that do.
- **Thoughtful segmentation.** Public radio spans a wide range of services, circumstances, and resources. Our broad plans speak to these diverse realities and the projects and solutions that flow from them must be “right sized” to communities, consistent with the character and values of different services, and appropriate to different stages of organizational development.
- **Integrated effort.** A successful campaign for change requires participation across the professional disciplines within our organizations. It requires effort and investment at both the local and national levels. There is no reason for anyone or any organization to be working alone on these critical issues and every reason to communicate, coordinate, and collaborate.

As we look at the ambitious plan of this report, we know there is an additional, critical set of measures necessary to realize our goals for audience growth – the steps that will strengthen the public radio organizations that are ultimately responsible for our plan, the professional development activity that will empower public radio's workforce, and research and analysis that will inform needed action in ways that go well beyond the GROW THE AUDIENCE project.

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Organizational Development

We recommend multiple initiatives to strengthen public radio's organizations. The objectives we surfaced in GROW THE AUDIENCE consultations with station and national leaders and that we endorse are:

- Governing boards for stations and other local public media organizations that include true leaders of the communities the organization serves, individuals experienced in nonprofit leadership and deeply committed to public radio's success, and, that in their totality signal the stature public radio seeks as significant community institutions.
- A strategic sensibility that guides organizations toward audience-centered public service goals, sustainable competitive positions in the broader media landscape, and an understanding of the importance of organizational choice among contending possible goals.
- Inclusiveness throughout the organization, from governance and staff to the underlying assumptions that guide fundraising, marketing, and programming.
- Engagement with the community that extends the impact of programs and services, informs the organization's planning, and builds connections to a broader domain of organizational and personal resources.
- Advanced fundraising that extends public radio's resources through major giving programs and development of philanthropic support and that explores new approaches aligned with new public radio services in the network environment,
- Inter-organizational relationships that support better communication, more efficient execution of activities designed to benefit more than one entity, collaborations that yield more than the sum of the parts, and contribute to more streamlined decision-making on important system issues.

Public radio must also confront a familiar list of long-term structural issues, many of them the result of compromises that helped accelerate public radio's early growth and some of which help sustain it today – too many entities, too little aggregation and scale, and too many licensees with agendas other than public radio that have not fully realized the service potential of their facilities. Change in any of these areas is difficult, but wherever possible public radio should look to new arrangements and outcomes that will contribute to stronger stations and stronger audience service.

Professional Development

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We recommend initiatives by public radio’s principal professional organizations, networks, and other national organizations that advance skills of the public radio workforce directly connected with audience growth.

- Professional organization meetings with audience growth as a major theme and sessions focused on areas central to the GROW THE AUDIENCE plan, including local journalism, innovation in music formats, strategies and skills for online services, and integration of marketing principles into public radio’s work.
- Ongoing peer review of broadcast and internet programming, both within and across stations, bringing “fresh ears” and “fresh eyes” to day-to-day work.
- Projects that create opportunities for shared learning experiences focused on planning and execution within specific formats and dayparts, such as NPR’s *Morning Edition Grad School* and PRPD’s *Midday Classical Music Research*.

Research

We recommend continuing investments in public radio audience and program research that build on current knowledge, extend themes developed by GROW THE AUDIENCE, and explore areas we have targeted for innovation.

We have highlighted numerous research questions and topics through our recommendations. We will not recount them here, but only observe that many of these topics are beyond the scope and capacity of individual stations and producing organizations and will require either collaborative investments or support from CPB or foundation funders.

Audience Metrics

Foster development of integrated, cross-platform public media metrics that track both levels of use and behavioral patterns for public radio’s programming and services and promote the use and understanding of such metrics throughout the system.

In framing the goals for public radio audience growth, we confront some important measurement issues going forward.

As public radio delivers increasing portions of its service through non-broadcast networked platforms, the field will need reliable and uniform measurement systems to track use and performance across platforms, and need public radio shares with the broader radio industry and electronic media providers generally.

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Arbitron is transitioning from diary-based audience estimates to Personal People Meters (PPM) in large markets across the country. There are important differences between the two systems and they produce different results. Early analysis indicates that the diary v. meter differences play out differently in different markets, in different formats, in different dayparts, and for different metrics. Public radio is setting goals informed by a diary-based history but that will be assessed using meter-based estimates for many stations.

For these reasons, we recommend a periodic review and possible re-calibration of these goals in light of developments in audience estimate systems.

Arbitron's shift from diaries to people meters and public radio's first efforts to compile the system's Aggregate Tuning Hours for SoundExchange are only the beginnings of significant and continuing changes in the tools and requirements for audience measurement. Public radio needs measurement tools that can follow our audiences as they use our content and services on different platforms and that support "apples to apples" examination of the strengths and vulnerabilities of the respective efforts. When we have such tools, decision-makers throughout public radio will need to learn how to use them.

8. Follow-up and Accountability

Establish responsibility and accountability, nationally and locally, for this audience growth plan through a CPB-supported annual review of system progress in addressing the recommendations in this report. The assessment should include perspectives of multiple constituencies, organizations, and individuals and result in a progress report to the public radio system.

GROW THE AUDIENCE is a broad-based effort to shape shared strategies, compelling goals, and results-oriented plans to widen the use and deepen the value of public radio. This draft report integrates the extensive input, analysis, and deliberations of the past several months in a document to which we invite comments and suggestions from all quarters. We will publish a final version later this spring.

A concern expressed by Task Force members is the prospect of a widely endorsed plan, with little follow-up accountability in terms of addressing the goals and recommendations. One member exhorted CPB to support “Someone to monitor the system’s progress toward addressing the recommendations so that it doesn’t get read and then put on a shelf to gather dust . . . That would be a tragedy.”

We recommend a multi-year follow-up effort.

- Secure broad endorsement of the goals and recommendations presented here.
- Public radio’s national producers, networks, and professional organizations should consider and report to their respective members and affiliates how they intend to integrate elements of GROW THE AUDIENCE recommendations into their priorities, programming, conferences, research activities, and other initiatives.
- Every public radio station should establish an audience service goal and a method for monitoring its own progress on an annual basis. This information should be reported in brief fashion to CPB either through a special survey or as part of the Annual Activities Report.
- Ask CPB, foundations, and agencies that provide significant support to public radio to address how recommendations in this plan will be reflected in their funding priorities and policies.
- Conduct an annual review of progress on the initiatives outlined above using goals and metrics appropriate to the particular activity.
- Report results and updated goals and recommendations to the system on an annual basis.

About the Audience Goals

Adopt ambitious goals, nationally and locally, for the reach, use, and inclusiveness of public radio.

This past year more people tuned in a public radio station, more people visited a public media web site, and more people were accessing public radio content at any given moment, than ever before. The past six months have provided a welcome shift from several years of stalled audience performance.

What about the long-term view? If public radio pursues the strategies, recommendations, and principles outlined in this plan for growth, it can achieve these targets.

REACH	Double the number of people who use public radio each week – on air, online, and through other networked services. This is some 30 million more people than the current audience – a weekly reach of about one in five Americans age 12 and older by 2020.
USE	Increase the average audience – the number of people using public radio at any given moment – to half again as large as today. This is an average of about 2.5 million people and will likely be some 7.5 percent of all measured listening to radio.
INCLUSION	Triple the amount of listening by people of color to public radio, reflecting a sense of public radio as a trusted and inclusive source across racial and ethnic lines.

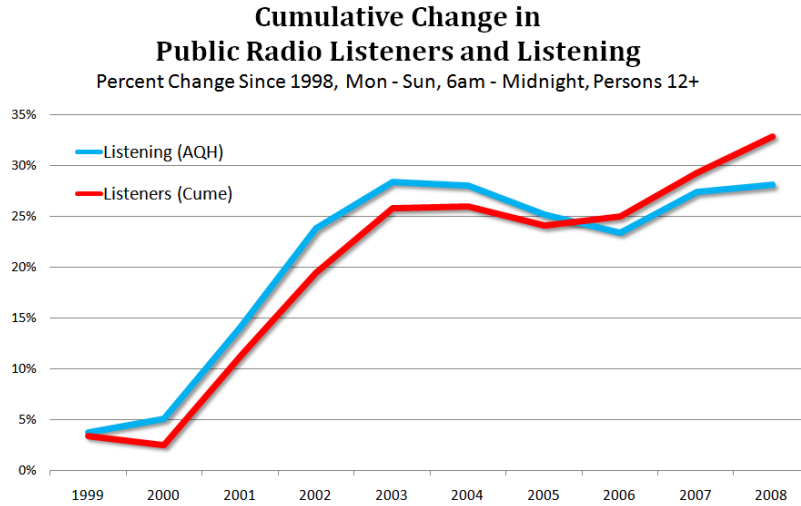
In this section we:

- Preview key indicators that provide context for our goals.
- Look closely at goals for reach and use in light of prior performance.
- Discuss important changes in measurement tools.

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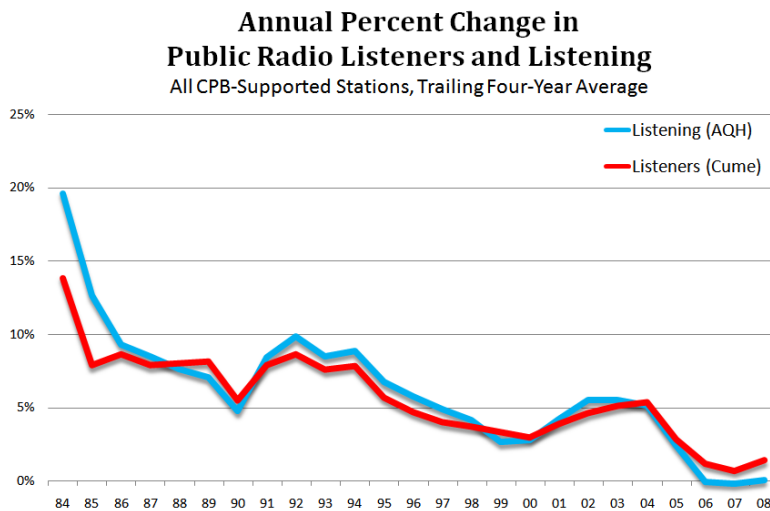
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A Look Back. After a disappointing performance in 2000, public radio experienced a dramatic, three-year audience surge associated with an intense series of news events – the 2000 election, 9/11 and wars



Source: Arbitron Spring Nationwide, Radio Research Consortium

in Afghanistan and Iraq. In 2003, **public radio hit a plateau** in the level of listening and the number of listeners. Both indicators declined slightly in 2004 and more so in 2005 before rebounding in the last couple of years. While the number of listeners is now at an all-time high – and by a substantial margin – **the amount of listening in 2008 was essentially the same as it was five years ago.**



Source: Arbitron Spring Nationwide, Radio Research Consortium

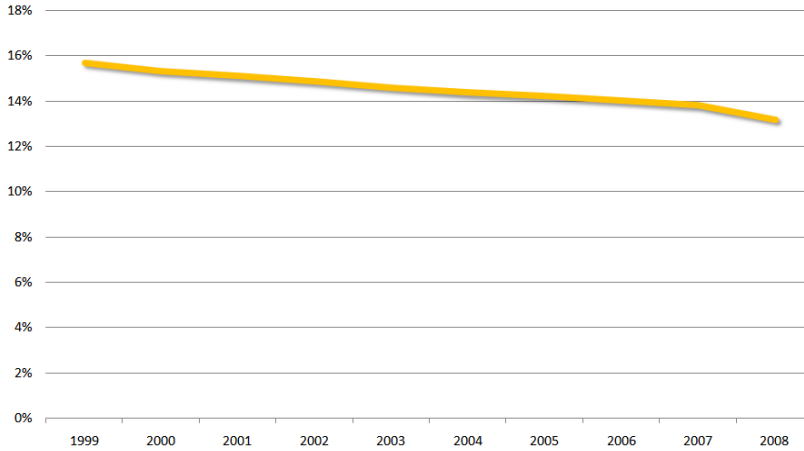
Looking over the broad sweep of the past two decades we see the pattern of a **maturing field with declining year-to-year growth rates.** The five to ten percent year-to-year growth of the mid-1980s and early 1990s fell to three to five percent annual growth and then to marginal incremental change. The chart at left presents trailing four-year averages. It is important to remember that as the audience grows, a percentage point of growth equals larger numbers of listeners and listening over time.

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AQH Rating for All Radio

Mon - Sun, 6am - Midnight, Persons 12+

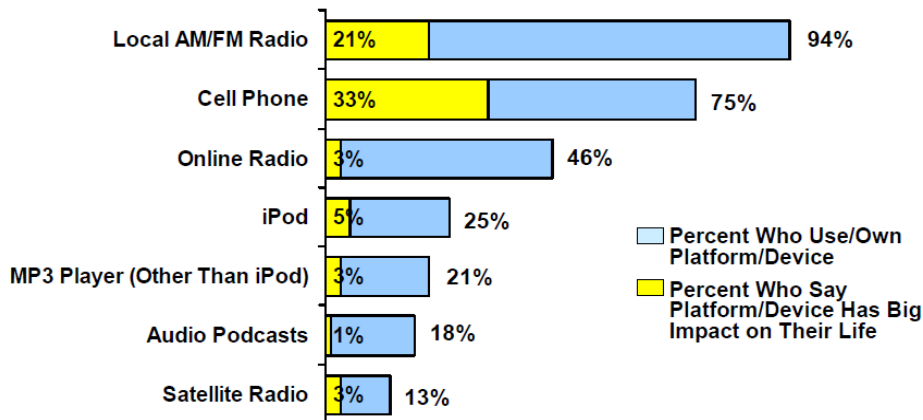


Source: Arbitron Spring Nationwide, Radio Research Consortium

Radio is the most resilient of the “legacy” mass media. But with each passing year the percentage of Americans listening to radio at any given moment declines a small amount. Public radio is “swimming against the tide” in efforts to build its broadcast listening. At the same time, huge opportunities remain for public radio to increase its share of radio listening, 95 percent of which is currently to other stations.

Cell Phones and AM/FM Radio Have Most Far-Reaching Impact

% of Americans Age 12 and Older Who Use/Own Platform/Device



“How much of an impact on your life has (platform/device) had?
 (“5” = “Big Impact”, “1” = “No Impact at All”)



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The platforms and devices on which Americans can find radio and other audio programming continue to grow in number and capacity. These technologies present opportunities to extend existing content and develop new public services for current and new user communities. Use and value metrics are in the early stages of development.

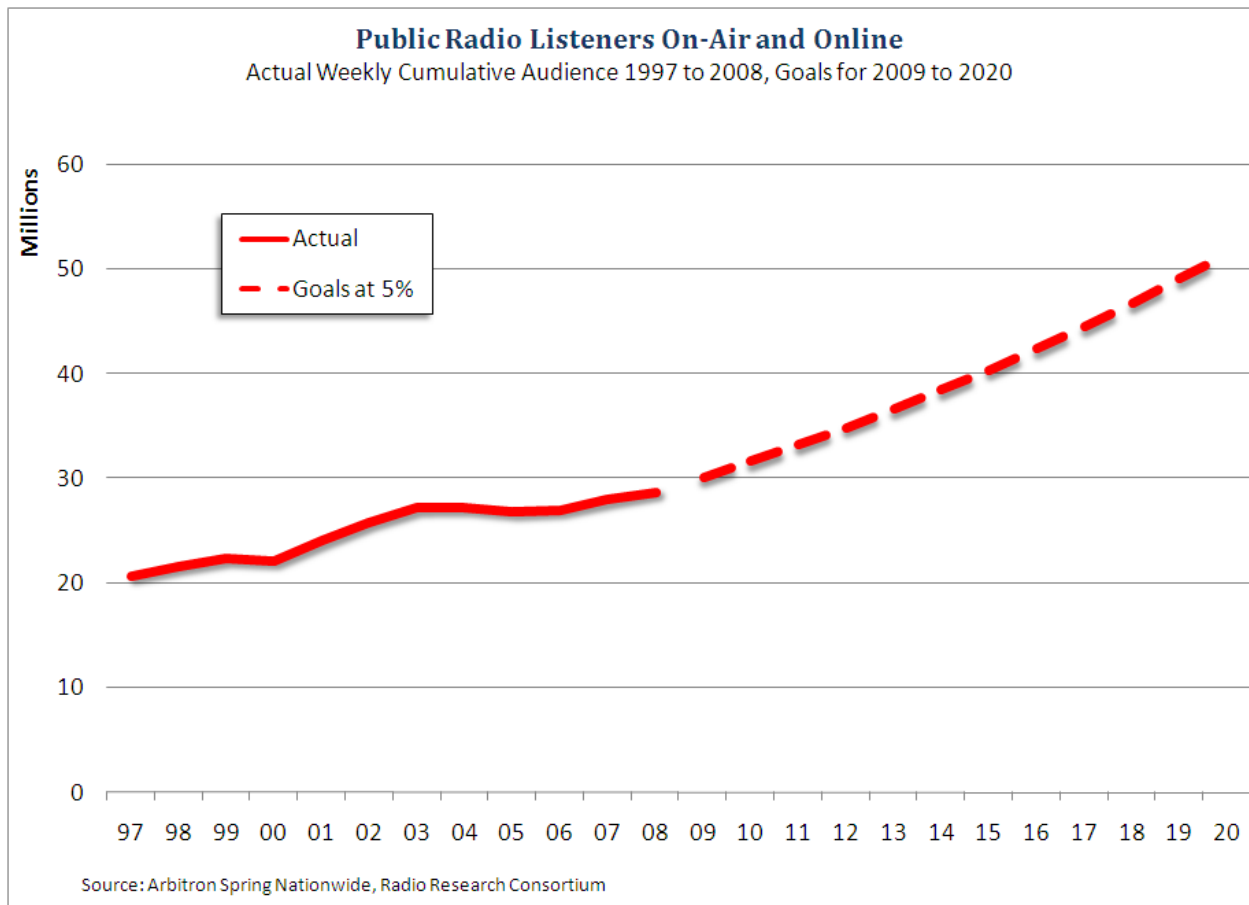
grow the audience

Public Radio in the New Network Age

Reach

In Spring, 2008 public radio reached 28.7 million listeners who tuned to public radio at least once each week. In the 12 years leading up to 2008, public radio experienced both several years of dramatic growth (such as 2001 and 2002) and several years of flat or declining audience (such as 2004 and 2005) – and the average annual growth rate in cumulative audience was 3.2 percent. Reaching 20 million more users by 2020, nearly 50 million in all, is a true stretch goal that will require an average annual growth rate between four and five percent over a sustained period of time, adding significant numbers of new listeners to the audience every year.

Annual growth rate	5%
Audience by 2015	40 million
Audience by 2020	50 million
Annual increase 2010	1,510,000
Annual increase 2015	1,930,000
Annual increase 2020	2,460,000



grow the audience

Public Radio in the New Network Age

Use

In Spring 2008 public radio reached an average audience of 1.75 million listeners throughout the broadcast week. This is the Monday through Sunday, 6am to midnight average quarter hour (AQH) audience. In the 12 years leading up to 2008, the average annual growth rate in AQH listening was 2.6 percent.

This is the measure that public radio has been unable to advance for the past five years. We recommend setting a goal of 3 percent annual growth, with the average audience climbing to 2.5 million listeners by 2020.

Annual growth rate	3%
Audience by 2015	2.2 million
Audience by 2020	2.5 million
Annual increase 2010	54,200
Annual increase 2015	62,800
Annual increase 2020	72,800

