

Public Radio in the New Network Age

Wider Use, Deeper Value, Compelling Change

Report and Recommendations of the Public Radio Audience Growth Task Force

grow the **audience**
for public radio



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Public Radio in the New Network Age

PUBLIC RADIO IN THE NEW NETWORK AGE presents findings and recommendations from GROW THE AUDIENCE, a broad-based effort to shape shared strategies, compelling goals, and results-oriented plans that will deepen the value and widen the use of public radio.

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The Station Resource Group provides ongoing leadership for the GROW THE AUDIENCE initiative. SRG assembled and supported the Public Radio Audience Growth Task Force, prepared this report, and will work to turn the recommendations into action.

George Bailey, of Walrus Research, served as research director for GROW THE AUDIENCE and prepared in-depth quantitative and statistical analyses that informed the Task Force and others in drafting the recommendations presented here.

Professionals and lay leaders throughout public media have contributed their views – in working groups and advisory teams, personal interviews, correspondence, and at conferences and board meetings of public radio’s national organizations. The project also sought views from academia, philanthropy, and public policy advocates. These many contributors are acknowledged at the end of the report.

Research reports, essays, and other project materials can be found at the GROW THE AUDIENCE website:

www.srg.org/GTA

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Station Resource Group is a membership organization of leading public media organizations. SRG’s focus is strategy, analysis, policy, and innovation.

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Introduction

Public radio has a shared mission to help individuals live better lives, to nurture the health of the communities in which we live, and to support the American democracy from small towns to great cities to the nation as a whole.

Public radio's fundamental public service is to make programming of quality and value available to audiences of significant size. Public radio has enormous assets, a prominent position, and important opportunities:

- To create and present stronger programming in traditional areas and through new offerings.
- To capture audiences that greatly extend today's already significant reach, use, and diversity.
- To forge deeper, more engaged connections with individuals and communities.

The Public Radio Audience Growth Task Force has created an ambitious plan to capture these opportunities in an unfolding network age. We address both national and local activities. We speak to stations that present different formats and serve different kinds of communities. We include the range of channels and platforms through which public radio engages with its audience. Our report and recommendations reflect themes we heard from most every corner of our field: pride in public radio's long-term accomplishments and current work and confident ambitions for a larger role in the broader media environment.

We propose challenging goals for public radio's growth over the coming decade – goals that are framed within a larger vision of service. Our strategic direction reflects the changing character of our communities and the changing technology of communications. Wider use and deeper value for public radio, at the scale we recommend, requires transformational change – in the capacities of public radio's organizations, in conceptions of meaningful public service, and in notions of who fits in an expanded public radio audience. Success requires welcoming new players into the field as both creators and presenters and making careful choices among competing options with exciting prospects but uncertain outcomes.

We of the Task Force share with our colleagues across the country a strong, almost impatient sense that public radio is ready, now, to move to a new level of service and impact.

Summary of Recommendations

Public radio has a shared mission of public service to individuals, communities, and the nation. Working together, public radio stations, networks, producers, and partner organizations:

Help people lead a better life – more thoughtful, joyful, and useful; more fulfilled in the pursuit of understanding and personal growth; empowered to find solutions for themselves and their families; and inspired and comforted by moments of beauty, humor, and reflection.

Nurture healthy communities which we seek to understand and care for across many dimensions – education, arts and culture, business and economics, the environment, health care, the sense of connection to values and social responsibility, and more.

Strengthen the vitality of our democracy – the free flow of ideas and debate, accountability for those who govern, and information that helps citizens make good decisions.

Public radio will realize this mission more fully by achieving ambitious, collective goals to increase its use, reach, and inclusiveness by significant measures. We propose that over the coming decade public radio:

Increase the average audience – the number of people using public radio at any given moment – to half again as large as it is today.

Double the number of people who use public radio every week – on-air, online, and on other platforms.

Triple the amount of listening by people of color.

We recommend seven broad measures for public radio to achieve deeper value and wider use:

Commit to a more inclusive public service.

Become the most-trusted, most-used daily journalism in America.

Create a 21st century public radio music service.

Embrace the networked environment as a primary platform.

Strengthen core competencies throughout public radio.

Develop market-by-market strategies for audience growth.

Support follow-up and accountability for addressing these recommendations.

1 Commit to a more inclusive public service

Deepen the value of public radio for all its audiences by strengthening the diversity of voices and views in public radio's mainstream news and music programming, 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.

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-day programming. We propose four complementary efforts, each with a special emphasis.

Diversity at the core. 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.

Program innovation. 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, alone, 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.

Differentiated services. 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.

Diversity of control. We recommend continued strong support for public radio stations that are developed and controlled by people of color, including pursuing opportunities to increase the number of such stations. It is 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 Become the most-trusted, most-used daily journalism in America

Make public radio America’s most trusted and most widely-used source of daily journalism. Strengthen the power and scope of public radio’s most listened-to national news programs, invest in program innovation that will lead to more choice and service for listeners, support significant growth in the scale, quality, and impact of local journalism, and develop an integrated online news presence.

Claiming a significantly larger role in American journalism requires a dramatically 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 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.

2.1 Strengthen signature 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 news and information programs has 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 to strengthen these and other signature national news programs 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 on how to achieve this goal.

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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 Build the impact and significance of local journalism

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.

Local journalism centers. 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.

Build capacity across the field. In addition to these highly-targeted investments, we recommend initiatives for other stations that have made substantial local reporting commitments in order to 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.

Collaboration. 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 that support work at more than one station. Such efforts should have a clear focus on wider use of content, cost reduction, or both.

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

2.3 Integrate 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.

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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.

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.

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 original 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 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 web-first entity. Public media should consider 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 Create a 21st century public radio music service

Create a renewed vision for public radio music – on multiple platforms, in multiple genres. Capture the broadcast franchise for public radio’s strongest music formats in as many markets as possible, move to new platforms with both core genres and new services, work to higher standards and greater value for listeners, and explore new approaches in content and presentation.

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

Capture the broadcast franchise. We recommend a concerted effort to increase the number of markets in which public radio 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 stations through acquisitions, mergers, and management agreements.

Move to new platforms. 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.

Higher standards. Public radio’s music stations must aspire to higher standards of presentation and greater value for the listener – compelling, trusted personalities, a sense of connection with audience and community, and excellence in production values.

New content, new approach. 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 Embrace the networked environment as a primary platform

Follow current public radio listeners in their changing patterns of media use, which increasingly include online and mobile platforms, cultivate new users by providing more channels and platforms on which 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.

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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, moving toward new models of engagement and participation that leverage and extend public radio's mission and brands.

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 throughout public radio, 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.
- 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, engage listeners and users around issues and interests in communities, and leverage the resources of knowledge, experience, and perspectives that surround public radio stations, producers, and audiences.

5 Strengthen core competencies throughout public radio

Advance public radio's ability to achieve the goals of this plan by sharpening the skills and focus of public radio professionals, strengthening the capacities of public media organizations across the country, and continually updating the field's strategic intelligence and tactical knowledge with audience research and marketing.

Thinking audience. Public radio must continually renew and reinforce its commitment to the effectiveness of its audience service – the details of execution in production, scheduling, and promotion; the audience experience of content and service; and the application of research and experience to daily operations. This work should include:

- Initiatives by public radio's principal professional organizations, networks, and other national organizations to advance skills of the public radio workforce directly connected with audience growth.
- Continuing investments in program research and audience use metrics that build our current knowledge base, explore areas we have targeted for innovation, and foster integrated, cross-platform measurements that track behavior in a changing media environment.

Organizational development. We recommend multiple initiatives to strengthen public radio's organizations as effective and responsive institutions that collectively contribute to a public media service of the highest quality and impact. These initiatives should include:

- Stronger governance and leadership in all licensee types
- A strategic sensibility in key decisions
- Inclusiveness throughout the organization
- Community engagement
- Advanced fundraising that includes major giving and philanthropy
- Stronger, more effective Inter-organizational relationships

Public radio must also confront long-term structural issues – too little aggregation and scale, many licensees with agendas other than public radio, and no plan for how to incorporate emerging public media enterprises with shared values but no base in broadcasting. These issues are beyond the scope of this project but are critical to public radio's long-term audience success.

Marketing – the missing piece. 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.

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Public radio must build its marketing skills almost from scratch. The work should begin with development of a shared sensibility regarding marketing principles, definitions, and purposes. The development of public radio's marketing capacity should extend across all professional disciplines and encompass work by all national organizations serving public radio. Key tasks include:

- Connecting with top-level marketing expertise and experience beyond the public radio field.
- Developing tactical ideas and best practices that can be implemented at the station level.
- Helping stations engage with outside marketing expertise in their local efforts.

6 Develop market-by-market strategies for audience growth

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

In any given market public radio is most successful at aggregating audiences of both significant size and significant diversity when it presents multiple, focused, and differentiated services delivered at a high level of performance. There are three key elements in this equation:

- Enough channels committed to public radio on which to offer different services.
- Strategic alignment of the services – focused, differentiated, complementary.
- Superior performance of each of the services within the context of the specific market.

Market analysis. We recommend additional 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.

Options in the top markets. We recommend a concentrated effort to 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:

- **Strengthen service at underperforming stations.** Simply bringing news and classical stations that are below the predicted level of service, given the character of their market, up to the norm would have a measurable impact on public radio's national reach.
- **"Align" service at existing stations.** Target markets in which public radio's formats are not available in a consistent and focused manner.

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- **Develop new services on existing stations.** These new services, by definition, are unproven, but format innovation is a critical step toward new listeners for public radio.
- **Create opportunities for new services** by gaining control of additional stations through acquisitions or operating agreements and by upgrading limited coverage signals.
- **Add stations with full market coverage through upgrades or acquisitions** in communities that currently benefit from only 1 or 2 full coverage public stations.

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.

7 Support follow-up and accountability for this plan

Establish responsibility and accountability, nationally and locally, for this audience growth plan through an 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 be encouraged to 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.

1. Diversity

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 programming, 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.

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.

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. 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, such as reflecting our world and our communities, providing authentic voices and lifelong learning, and offering a spirit of idealism. We and our listeners should expect inclusiveness in 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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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:

“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.”

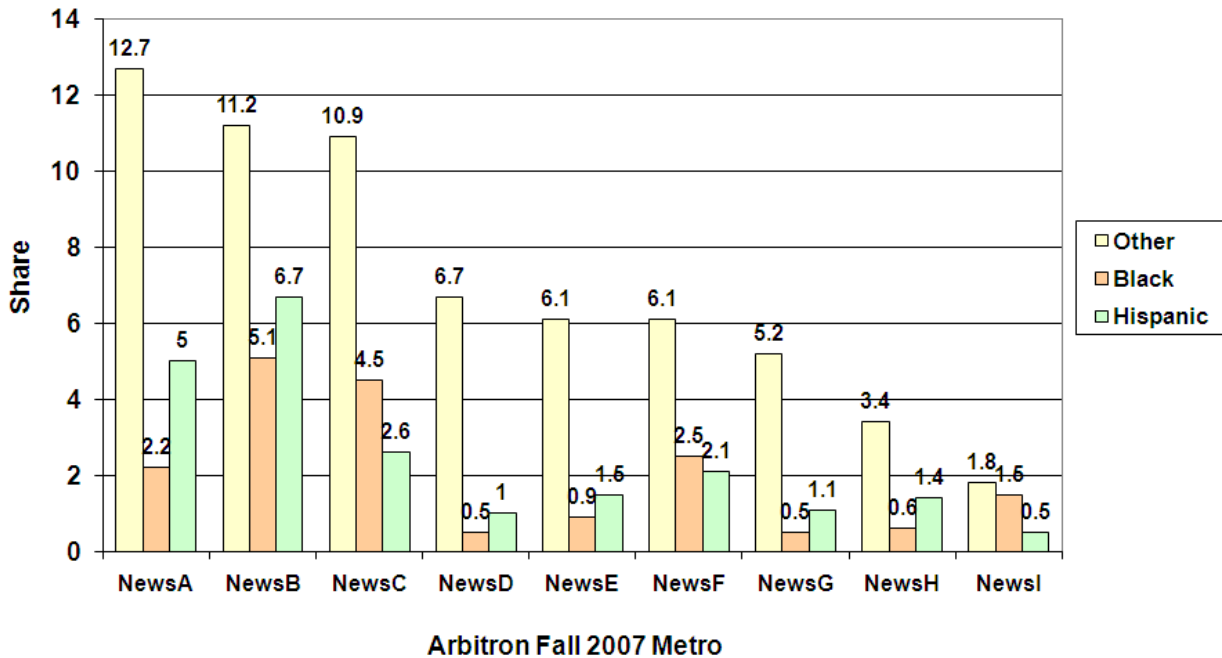
Loretta Rucker, of the African-American Public Radio Consortium, parsed the point this way:

“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 – News Stations
Black, Hispanic and Other College Grads**



This chart shows the share of listening by college graduates to nine public radio **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. 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 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. For public

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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.

Public radio's signature national programs not only generate a large 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.

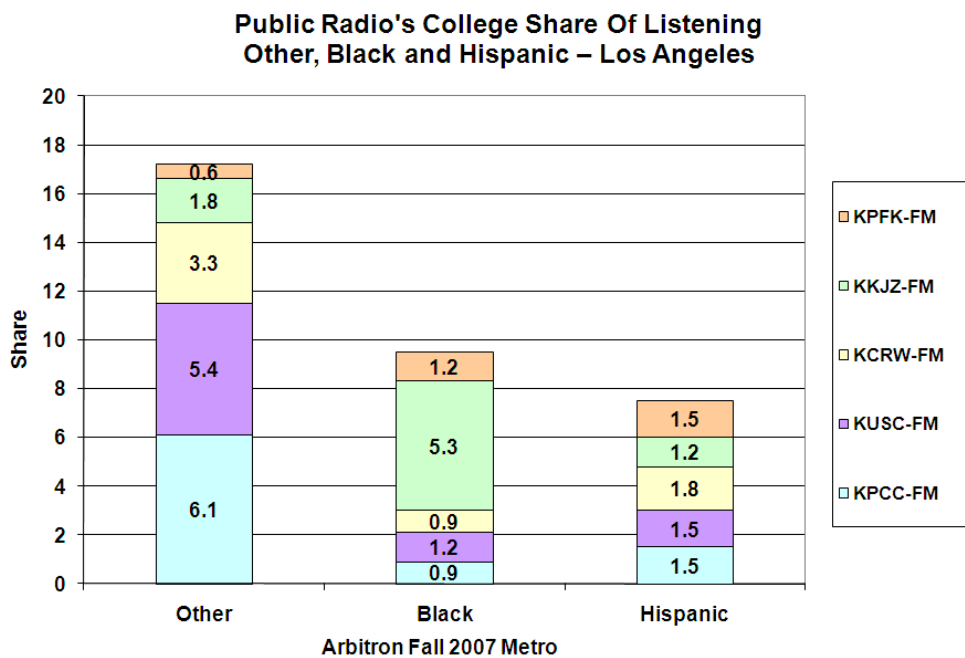
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Other music services, such as AAA, have their own distinctive patterns of audience appeal as well.

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, equally 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 station ownership and control by people of color. 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 results.

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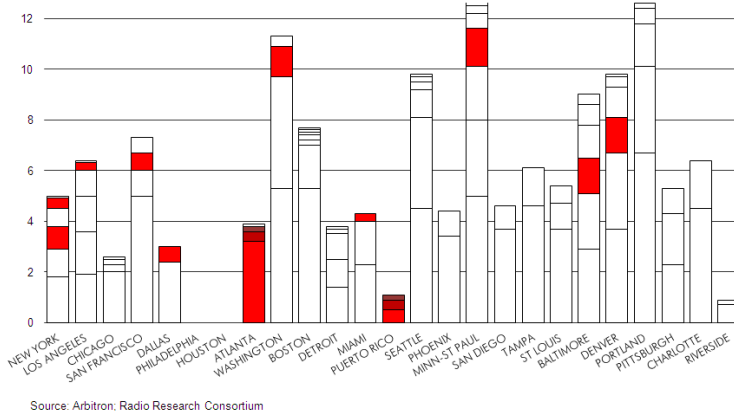
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other three stations in the top ten are WAMU (Washington), WNYC-AM (New York), and WBUR (Boston). Source: Arbitron as processed by AudiGraphics, average of Fall 07 and Spring 08.

- 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. When opportunities arise to increase the number of such stations through applications for new stations, 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 the 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 most widely-used source of daily journalism. Strengthen the power and scope of its most listened-to national news programs, invest in program innovation that will lead to more choice and service for listeners, support significant growth in the scale, quality, and impact of local journalism, and develop an integrated online news presence.

Public radio’s largest near-term opportunity for audience growth and new public service is in news – national programs, local journalism, 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*, WHYI’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 websites 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 than other programming.

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 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.

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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.

Public radio has 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 more at the edge of the field than the center.

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 it aspires. Public radio organizations cannot simply take up roles, beats, and topics as they are left behind by others. Rather, 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 service and 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 public radio as a whole, as much as half or more of all listening to the stations that carry them, and greater listener loyalty than most other programming on stations' 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*.

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

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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 Project Argo and 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 develop a story 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 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.

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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, which recently hired its first editor dedicated to investigative work, and APM’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. We reiterate here our recommendation in the preceding section that public radio’s signature national news programs need more diverse voices and views across the range of daily stories, the people doing the news, and those presenting analysis. This will increase the accessibility and authenticity of programming in communities across the country. 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 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

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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 dayparts, 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 keep public radio apart from the sometimes drone-like qualities of 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 for 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:

“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

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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 two distinct services.
- 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 larger 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 complementary 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-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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Ten to fifteen stations (or state/regional networks) have 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 and should be a feature of investments in building increased local capacity.

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

In addition to these targeted investments, we recommend initiatives for other stations that have made substantial local reporting commitments in order to 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, places a strong emphasis on the need for quality in local news:

“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

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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 that will serve more than one station. 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 the 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 partnerships and collaborations that look outside public radio to other content-creating organizations and community resources. We recommend development of suggested editorial principles, policies, and practices that will preserve the trusted position and integrity of public radio in this more inclusive and multi-dimensional environment.

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

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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 best to integrate local and national elements, but there was broad agreement that such seamless technical integration was essential. There is substantial divergence on how to 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 currently outside the principal public radio constituencies.

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.

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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.

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 collective efforts in a way that both stands on its own and leads back to the original reporting.

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 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

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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 a staff of 200 or more – about two-and-a-half times the current size of NPR Digital Media.

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

Create a 21st century public radio music service – on multiple platforms, in multiple genres. Capture the broadcast franchise for public radio’s strongest music formats in as many markets as possible, move to new platforms with both core genres and new services, work to higher standards and greater value for listeners, and explore new approaches in content and presentation.

“If news is the brain of public radio, music is the soul. But, somehow, music has less status. It’s not as much on public radio’s 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 of the 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 number of the listeners who tune to public radio each week, a major share of total public radio listening, and a principal point of connection with many of public radio’s African-American, Latino, and Native listeners. Public radio’s music services have a growing presence beyond the broadcast through streaming and mobile applications. Many music stations are deeply engaged with their communities, with long-standing connections to local cultural institutions, performers, and the avid devotees of their music.

Public radio’s largest audiences and highest listening levels occur in markets where public radio offers its best-performing formats, both news and music, over multiple stations that are differentiated from each other. The most powerfully performing combination is a news station featuring NPR and other network news programs and a classical music station – as seen from Washington to Cincinnati to Portland and 18 other top-50 markets.

Still, some question the future prospects for public radio’s music stations and music programming. “Public radio” has become increasingly synonymous with the NPR News brand. The broadcast audiences for many music stations have been essentially flat for years. Public radio’s music services are not fully integrated into system strategies and plans.

We believe that music, arts, and culture are a fundamental part of public radio’s mission to serve individuals, communities, and the nation, and are important elements of a comprehensive strategy to achieve dramatic growth in the use, reach, and diversity of public radio’s audience.

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The State of Play

“All music” stations that present public radio’s three dominant music formats – most of which are in major markets – account for one out of every four hours of public radio listening. In Spring 2008

- 46 classical stations attracted 15 percent of all listening to public radio
- 25 jazz stations attracted 6 percent of all listening
- A dozen AAA stations attracted 4 percent of all listening

Listening to music on public radio’s scores of news-and-music stations adds to the total, as do those stations presenting music other than classical, jazz, and AAA. In all, music accounts for about one-third of all listening to public radio in America.

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

Most of public radio’s most successful online services are music – 15 of public radio’s top 20 streaming stations (measured in terms of “average tuning hours”) 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 WWOZ (New Orleans) have established national online brands for themselves. WKSU (Kent, OH), with *Folk Alley*, and WAMU (Washington, DC), 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 music streams from a dozen NPR member stations. NPR Music tests the notion of an integrated portal of material from diverse sources – not unlike the notion proposed for news in the previous section – and the idea of a single pathway into multiple music genres.

The Public Radio Tuner iPhone application had become the top free music application on the iPhone, with over 1.5 million downloads by mid-2009.

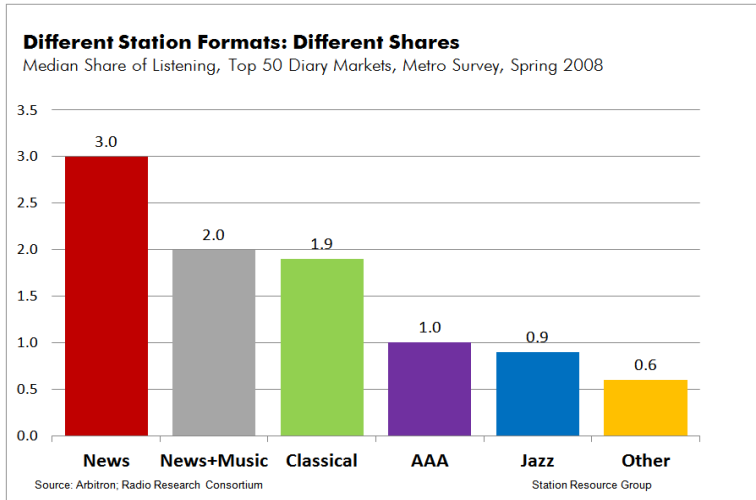
Some public radio music stations are an important part of the cultural lives of their communities by virtue of their long-term engagement with organizations and individuals working within the music genres they present. These stations foster an awareness of events, venues, and organizations that encourages attendance and support. They create and present concerts, festivals, and other events of their own, showcase emerging artists, and build awareness of their community’s culture.

In programming and listening, however, the long arc of change has turned in the direction of news. News and talk programs have replaced music on news-and-music stations’ schedules, mixed-format stations have switched to all-news in several markets in each of the past few years, and most of the net

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growth in listening to public radio over the past decade has been to news and information programming rather than music.



The median share of listening to public radio news stations in the top 50 markets is a full share point above the median for news-and-music and all-classical stations and two share points above AAA and jazz stations. These are truly significant differences in performance.

But the different status of news and music within public radio is also political and cultural. Congress and the various political entities

at the state and local levels that contribute significant sums to the public radio enterprise tend to focus on civic life and public affairs. The sensibility that lets music and art fade from public schools and marginalizes national investments in the arts and humanities also relegates public radio's music and cultural offerings to a lower level of respect, interest, and financial support.

There are also structural issues within the field. Public radio's music has few visible public champions. Senior network executives usually associate themselves more with their news and information efforts than their music services. There is no dominant music host or personality to match the best known names from public radio's news and entertainment programs. Many all-music stations – especially classical – are part of multiple-station operations where they are paired with a public television station or an all-news radio station with bigger audiences and larger claims on the leadership's attention.

Public radio has a significant choice to make going forward. It can allow its music services to drift in the direction of "maintenance mode" with, at best, steady-state long-term prospects or worse, progressive marginalization. Or it can re-imagine and re-invigorate the role of music in public service media.

Capture the Broadcast Franchise

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

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 and station acquisitions. This has occurred through abandonment of the classical 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. As this report was being finalized, WNYC acquired the WQXR classical franchise in New York and WGBH purchased classical WCRB in Boston.

Although less dramatic, growth of listening to AAA stations has been driven by similar developments in availability, including acquisition and a format change (“The Current” in Minneapolis-St. Paul), AAA stations entering the CPB-supported system (WTMD, Baltimore), and emergence of the AAA format from a previously eclectic schedule (KRCL, Salt Lake). Most recently, KERA acquired and launched a new AAA service in Dallas, KXT, to complement its existing news and information channel.

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

The surest path to more listening to public radio music is more stations presenting music on a consistent, full-time basis in markets with significant audience opportunity.

[The chart on the following page shows CPB-supported “all music” public radio stations that present the three principal public radio music formats in the top 50 markets.]

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	Classical	Jazz	AAA
New York	WQXR	WBGO	WFUV
Los Angeles	KUSC	KKJZ	
Chicago		WDCB	
San Francisco		KCSM	
Dallas			KXT
Philadelphia	WRTI		WXPB
Houston		KTSU	
Atlanta		WCLK	
Washington	WETA		
Boston	WCRB		
Detroit	WRCJ		
Miami	WKCP	WDNA	
Seattle			
Phoenix	KBAQ		
Minneapolis-St Paul	KSJN	KBEM	KCMP, KUOM
San Diego		KSDS	
Tampa			
St Louis			
Baltimore	WBJC		WTMD
Denver	KVOD	KUVO	
Portland	KQAC	KMHD	
Pittsburgh	WQED		WYEP
Charlotte	WDAV	WNSC	
Riverside			
Sacramento	KXPR		
Cleveland			
Cincinnati	WGUC		
San Antonio	KPAC		
Salt Lake City	KBYU		KRCL
Kansas City			KTBG
Las Vegas	KCNV	KUNV	
Orlando		WUCF	
Milwaukee			
Columbus			
Providence			
Indianapolis			
Norfolk	WHRO		
Austin	KMFA		
Raleigh-Durham		WNCU, WSHA	
Nashville			
Greensboro		WSNC	
West Palm Beach			
Jacksonville			
Oklahoma City	KCSC		
Memphis			
Hartford	WMNR		
Buffalo	WNED		
Rochester	WXXI		
Louisville	WUOL		WFPK

Move to Multiple Platforms

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.

A growing number of music stations are also offering second streams that differ from their main channel in ways both large and small, as well as podcasts, archives, concerts, community calendars, and other special features. These stations are using the networked environment to go deeper into their respective formats, to engage with listeners and events in their communities, and to experiment with and explore specialized niches, new approaches to presentation, and new music options.

Issues of long-term financial sustainability loom large for everyone working in this area. Adding services that go beyond the core on-air broadcast adds costs – but on the other side of the ledger it is difficult to track revenues that the new activities generate. 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?”

A core concept for both seizing opportunities in the networked space and creating a plausible business plan is aggregation. For some years it has been clear that the broad direction in mass media is smaller audience shares for any given channel and the creation of market position through aggregation of audience across multiple networked and business platforms. 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, which is aggregating market share across every channel and platform it can find.

WXPB had a 1.7 share of radio listening 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, and makes four online streams available to users, three of which it produces in-house. The station has also aligned itself with NPR Music, has a second HD service, and a host of other ongoing activities.

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, but across all music formats these issues have made aggressive moves into the new network age more difficult for music services than for their colleagues in news.

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Public radio recently concluded negotiation of royalties for stations' online music services and was able to secure a comprehensive arrangement for the field and a single payment by CPB to cover the public radio system. The current contract for streaming rights and royalties, however, does not address numerous programmatic restrictions in copyright law that challenge music programmers and it 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, but others have plans for exclusive domain in the networked space or are reluctant 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.

Public radio needs a comprehensive rights strategy that will encourage the most robust development of its music services in the networked space.

Higher Standards

Public radio's music stations must aspire to higher standards of presentation and greater value for the listener – compelling, trusted personalities, a sense of connection with audience and community, and excellence in production values.

One music programmer expressed the problem this way:

“We are protected by our niche and our 2 share. We are too small for the commercial guys to attack, but large enough to keep our nose above water financially. So why rock the boat, why try harder?”

Listeners in all genres have increasing options to find their favorite music. Radio stations must offer compelling value to the listener by presenting the music and something more. We have heard many suggestions to strengthen performance in public radio's core music franchise; they fall into three principal categories.

First, recruit, develop, and keep compelling personalities that build trust with listeners. The music is always the “star” of the show, but an engaging and trusted guide sets apart a top-performing service from the generic offerings available online, from satellite radio, cable companies, and elsewhere. Public radio listeners appreciate it when a knowledgeable host introduces them to new music or new performances or shares a little bit of information about the music, its composer, or the artist. Public radio music listeners like to learn – a little bit – and they enjoy the companionship of smart, familiar hosts.

Second, create a sense of timeliness, immediacy, and community connection. Music stations add value when there is some sense of purpose to the piece that pops up next on the playlist – a connection to a local performance or a soon-to-arrive touring artist or a link between the music or artist and something

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else the station has presented or featured. The service needs to be more than an endless soundtrack or an artful algorithm.

Third, production values for public radio's music programming should match or exceed those we expect and demand of news and information programming. Even in many of public radio's larger markets, there is a day-in, day-out lack of consistent quality to music presentation.

New Approaches

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.

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 and consider other music possibilities that might fit within the broader public radio domain. The threshold of sustainability for a public radio music broadcast service is about a 1% market share, based on current formats. In the space between commercial viability on the one hand and lack of sustainability for a nonprofit on the other, what are the music genres that would generate at least a 1 share in the top 50 markets?

Younger listeners are going 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

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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, of course. But public radio is currently stuck in a music box of its own making and the pathway out starts with ideas and experiments and a few risks until something sticks.

4. The Network

Follow current public radio listeners in their changing patterns of media use, which increasingly include online and mobile platforms, cultivate new users by providing more channels and platforms on which 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 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 a broad, long-term basis, makes this observation:

“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.”

The opportunities of networked technologies are a continuing thread throughout most sections of this report – they are increasingly a “fact of life” in how public radio delivers its service. But the force of change is powerful enough – “something altogether new” as Pew puts it – that we believe it is worth reflecting upon the broad directions in which new technology is changing our field, guiding principles for the emerging environment, and recommendations for national and local actions.

Vectors of Change

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 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

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(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. 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 – 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. At the leading edge of the public service media organizations that work entirely in the non-broadcast, networked space are entities 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, through they may lag far behind the local public radio station in daily reach, are the equal or more with respect to community partnerships, number of journalists, or foundation support. 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.

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- 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
 - 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 (*e.g.*, 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 *deus ex machina* events. Scale well.

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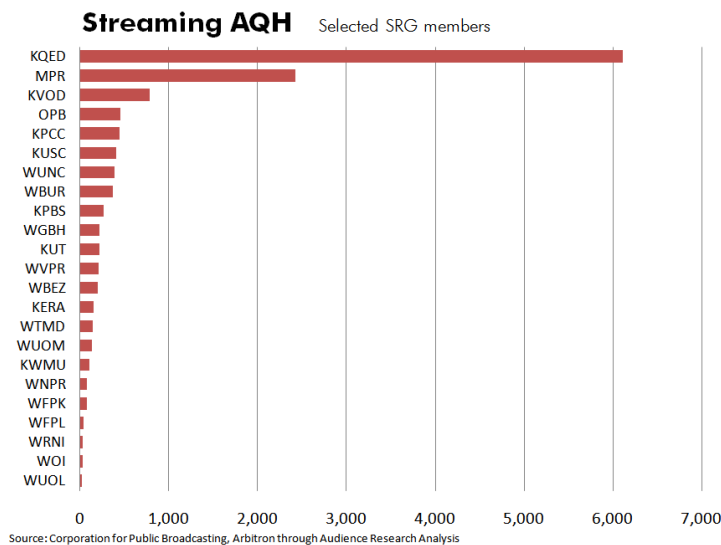
DEVELOP

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.

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)

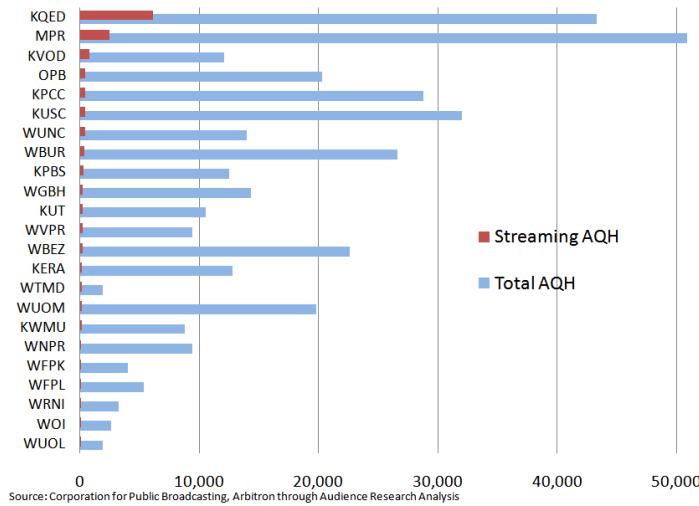


In this chart we see the average audience online for a number of SRG members who were willing to share their numbers. We can see a couple of stations – major players in our field like KQED and Minnesota Public Radio – to which a significant number of people are listening online. But we also see that 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.

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Streaming AQH and Total AQH



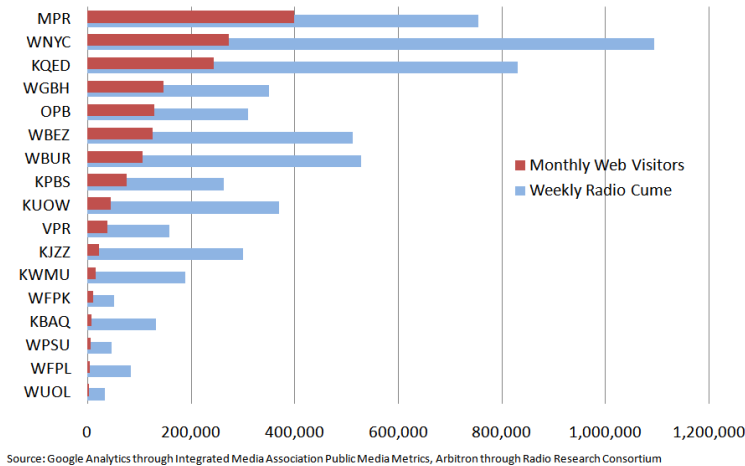
We see this more clearly when we look at listening online in the context of total listening, both on the air and online. The online numbers are small fractions of the total for even the most successful public radio streamers.

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-

used content feature on public radio station websites. 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.

Monthly Web Visitors and Weekly Cume

Selected SRG members



This chart looks at the *monthly* unique visitors to a number of stations' websites 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. We should also note that these data are from 2008 and some of these stations have seen significant increases in web traffic over the past year.

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

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- Some studies suggest that most people who visit station websites 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 come 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 websites show up only once per month.** In contrast, people in a typical public radio station's weekly come tune in about a half dozen times per week on average.
- Most **visits to public radio websites 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.

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.

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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 website 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, 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 a 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."

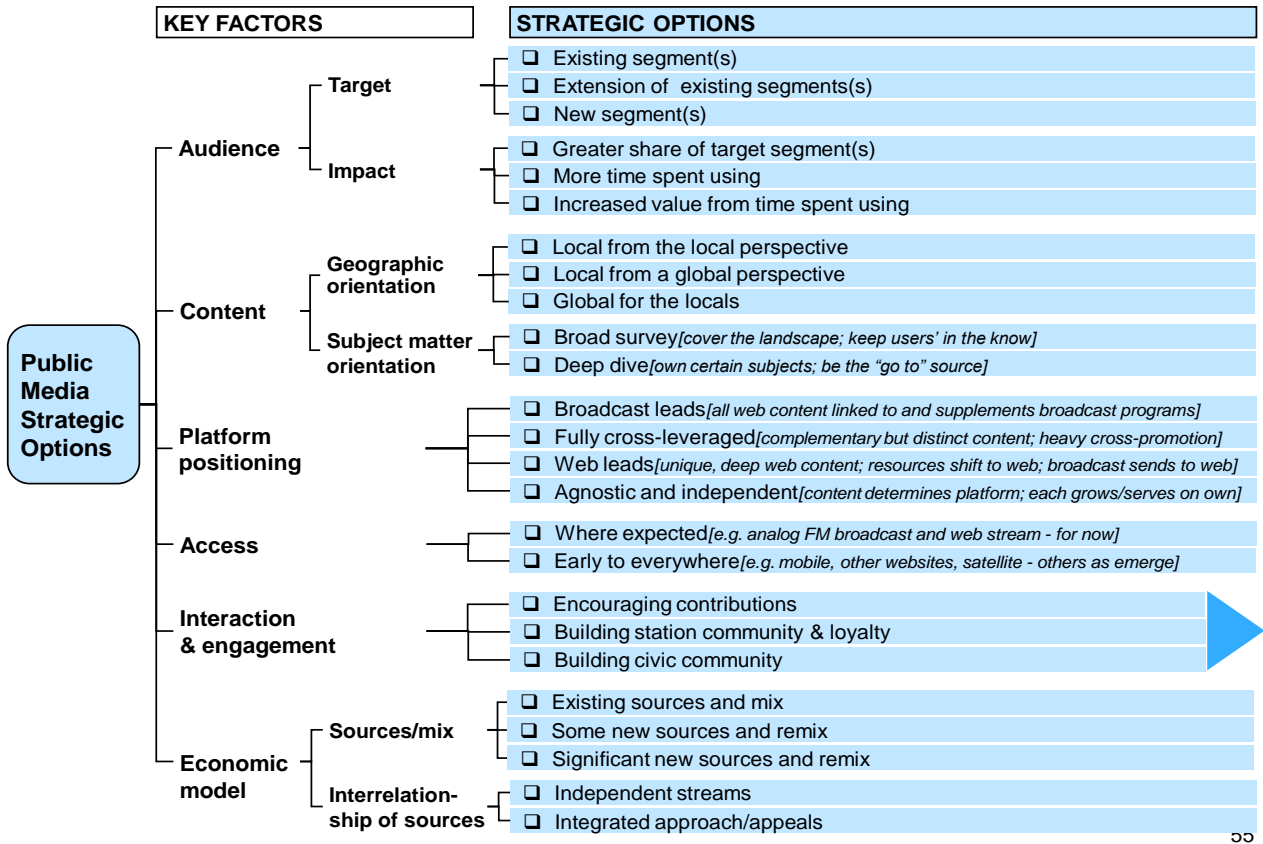
This past year PRX surveyed stations that many in the field would consider leaders in public radio web development. A cluster of **issues around strategic clarity surfaced with full force**. PRX observed:

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- 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,” reacting, drifting, and dissipating their resources.
- Limited resources to invest and as-yet unclear ROI means there are potentially significant opportunity costs of mis-investing in the web. Limitations of scale and talent at the station level lead to risks of overreaching and poor execution for all to see.
- Stations face the dilemma of choice – nothing has choices like the web and too many choices can lead to poor choices.

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 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 throughout public radio, 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 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 websites 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 websites 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 websites 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 include text, images, and “web only” audio features that go deeper or further than broadcast material.

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 website. 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 that developed and supports 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:

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- 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 of “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 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, engage listeners and users 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. Others talk about leveraging the communities 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

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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.

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

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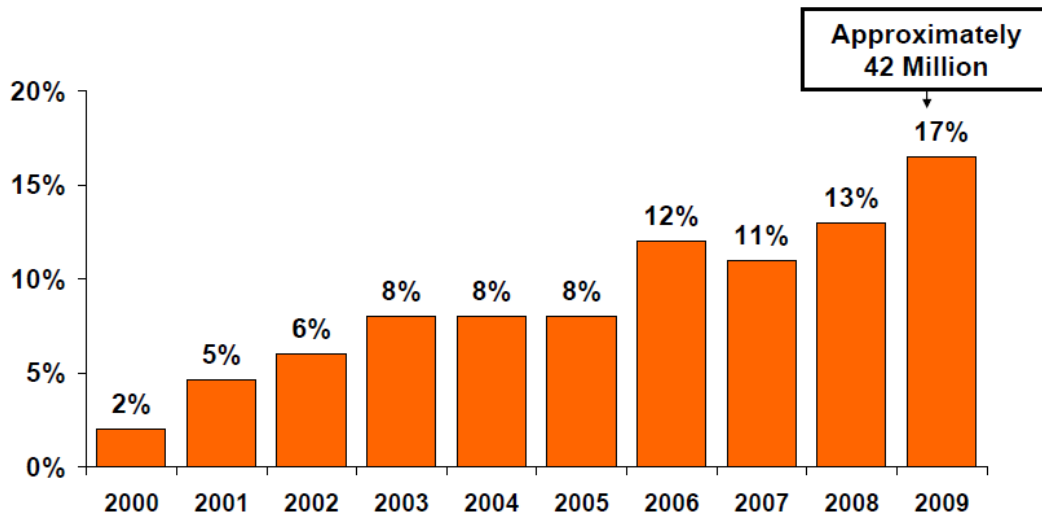
journalism and programs by NPR, APM and PRI—but that content will be available directly on the web, and more and more people will turn to it there.

“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 to 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. “

Walker’s perspective is at once inspiring and challenging. It builds from the scale and location of WNYC as well as her own vision. More of us need to push our own long term views forward in a similar way, reflecting our own circumstances of mission, resources, and community.

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. Core Competencies

Advance public radio’s ability to achieve the goals of this plan by sharpening the skills and focus of public radio professionals, strengthening the capacities of public media organizations across the country, and continually updating the field’s strategic intelligence and tactical knowledge with audience research and marketing.

In simple and blunt terms, public radio cannot reach our goals for audience growth or implement our plans for diversity, journalism, music, and the networked space with current skills, organizational capacity, and knowledge. Public radio must build itself as a field to make real the service to which we aspire.

Thinking Audience

Public radio must continually renew and reinforce its commitment to the effectiveness of its audience service – the details of execution in production, scheduling and promotion, the audience experience of content and service, and the application of research and experience to daily operations.

Marcia Alvar, former President of the Public Radio Program Directors Association (PRPD) and now Manager of Station-Based Projects for NPR’s Local News initiative, is a strong advocate for putting public radio’s shared experience and best thinking to work on a daily basis. Reporting from a planning session for the Local News Initiative, she wrote:

“If a single mantra emerged from the discussion it was this: Use what we already have. Do what we already know.”

Public radio already has many of the insights and programming models needed for great leaps in the use and value of its work, but they must be applied in a consistent and disciplined way among stations at all levels of operation, in all formats, in all kinds of communities. This is the territory of effectiveness, best practices, and performance benchmarks, at the heart of which is giving close attention to listener loyalty and the personal importance of public radio’s service to those who use it. By focusing on operating effectiveness over many years – with use, reach, and value to listeners as central themes – public radio has moved from serving audiences of thousands to audiences of millions.

Programming and marketing consultants Deborah Blakeley and Israel Smith outlined key steps and best practices for audience growth in “Thinking Audience,” a piece commissioned by GROW THE AUDIENCE. They assert that most public radio stations can realize significant audience gains by consistently focusing

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on the audience experience – “thinking audience” across all areas of operations – and putting to work existing knowledge and research. Blakeley and Smith wrote:

“The most successful businesses and non-profits – large and small – grow and keep their audiences because they pay attention to how people experience their organizations. They are able to articulate how and why they are an essential service to the community, from the audience point of view. And they know the audience experience is the driving force of their success or failure.”

Most of this work has to be implemented by individual organizations – at both stations and networks – and is a matter of leadership and focus by senior and mid-level management teams. But nobody needs to work alone. Many of public radio’s advances in collective knowledge and shared best practices have come about through group learning experiences. GROW THE AUDIENCE interviews and conversations with successful public radio executives and programmers repeatedly surfaced examples of professional turning points that occurred in seminars and training sessions developed by the Radio Research Consortium, Audience Research Analysis, PRPD, and others. Many of these opportunities were at least partially underwritten by CPB.

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

Examples of such initiatives include:

- Professional organization conferences and 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 programming and Internet services, 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*.

We recommend continuing investments in program research and audience use metrics that build our current knowledge base, explore areas we have targeted for innovation, and foster integrated, cross-platform measurements that track behavior in a changing media environment.

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For decades, public radio's growth has been fueled and built upon an understanding of how people use and find value in our services. We will not recount the numerous research questions and topics highlighted throughout this report, but will observe that many of the 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. As we move forward, public media also needs reliable measurement tools that not only track use of broadcast services, but that 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.

Organizational Capacity

We recommend multiple initiatives to strengthen public radio's organizations as effective and responsive institutions that collectively contribute to a public media service of the highest quality and impact.

Public radio must examine its basic building blocks, a system of several hundred organizations that has grown organically for 40 years, shaped by a combination of national policy, local politics, nonprofit entrepreneurship, and historical accidents.

Leadership and governance. Public radio stations operate in many different organizational settings – a myriad of arrangements within public and private institutions of higher education, independent nonprofit corporations that include the very smallest and the very largest public radio operations, state agencies, tribal governments, school boards, and a miscellany of other entities. Some 72 public radio stations operate in conjunction with a public television station. Over 50 public radio organizations offer at least two distinct main channel program services.

When it comes to audience service it is possible to find examples of both excellence and mediocrity across all of these structures. As one commenter to the Task Force observed, "There is no correlation between licensee type and audience size." But as another public radio veteran, who has worked in several organizational settings, said, "We are unlikely to get to our ambitious audience goals, especially with respect to finding the considerable resources we need to get there, without doing something about the governance at many of our stations." Both are correct.

We believe public radio stations, regardless of their structure, benefit from governance that includes true leaders of the communities the organization serves, individuals experienced in nonprofit leadership, deeply committed to public radio's success, and who, collectively, signal the stature, confidence, and credibility that public radio seeks as significant community institutions. How to achieve this goal depends upon the organizational framework.

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- For many independent community licensees, it is essential to raise the bar in board development, to get outside the inner circle of the station and find leadership in the larger community, and to set higher expectations for board performance in strategic planning, fundraising, and accountability.
- For some institutional licensees, the path may be to find closer links to the prestigious individuals who head their institutions as trustees or executives but who often give little attention to their station. For others, creating capable, committed, and engaged community councils or advisory boards has brought fresh perspectives to the station and opened doors elsewhere in the community.

With an understanding that governance is always a sensitive issue, we recommend further scrutiny of the ways in which civic leadership can contribute to the wider use, deeper value, and greater success of public radio's programming and services. Especially successful examples – within different kinds of structures and different kinds of communities – should be viewed as role models.

Best practices. There are many other important areas of organizational development that need attention in public radio and that will contribute to audience growth.

- 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 making choices among competing possibilities
- Inclusiveness and diversity throughout organizations, 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 more streamlined decision-making on important system issues.

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Many of these dimensions of organizational strength are not unique to public media, which can benefit from experiences and support organizations elsewhere in the nonprofit sector.

Organization of the field as a whole. Many observers – both inside and outside public media – see too many public radio entities, too small a scale in many operations to achieve serious impact, and too little aggregation of resources. In this view, public radio must reconsider its arrangements in the interest of greater impact, whether through informal alliances and collaborations or more far-reaching structural reform. Either solution is difficult to achieve.

Public radio has largely rebuffed simplistic solutions to this issue, such as arbitrary limits on the number of CPB-supported stations in a market or freezes on new entrants to the public radio system. Eligibility criteria and performance standards that must be met to receive CPB funding have been key tools in this regard and are largely under-appreciated by those without close knowledge of funding policies that have built a system of stations that deliver multiple formats to the nation’s population and which build audience and diversity.

The greatest challenge ahead is not the reduction of the number of organizations receiving support for radio services, but how to enlarge the circle of organizations that play a role in delivering public media services. Efforts that extend the benefits of CPB support to a larger circle of organizations (beyond those that receive Community Services Grants), such as the CPB/SoundExchange contract, contribute to widening the circle, but ultimately it will require a substantial increase in federal funding to fuel a more expansive and inclusive public media system of the future.

Marketing – The Missing Piece

Twenty years ago the watershed *Audience 88* study demonstrated that listeners who choose public radio are significantly different from those who do not. Listeners who make a public radio station their favorite are different from those who just sample its programming. These differences extend to the kinds of listeners who are attracted to each of public radio’s distinctive formats and services. And all of these differences are reflected in the extent to which listeners consider public radio important and worthy of their financial support.

More recently, a series of “core values” studies by PRPD and SRG highlighted the ways in which the values, uses, and gratifications that listeners associate with public radio’s major formats align in some ways and but differ significantly in others.

As public radio moves forward to new strategies, new platforms, and new audiences it must explore these same questions from a different perspective – not with the hindsight of assessing an established service, but with a prospective view to targets of opportunity.

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Public radio must build its public service marketing skills almost from scratch. It is fundamental work for a more ambitious future.

Throughout GROW THE AUDIENCE consultations, marketing repeatedly surfaced as a collective blind spot. A growing number of leading public radio organizations (and many elsewhere in the nonprofit sector) believe that their long-term institutional success, including the ability to attract a more diverse audience, hinge upon an organization's marketing expertise and capacities. Most everyone in the field, especially our most advanced stations, agrees that marketing is a critical institutional skill-set.

Following a broad survey of stations, DEI concluded that few organizations define marketing the same way, that organizations use vastly different assumptions when developing job and department responsibilities, that public radio marketing is overwhelmingly tactical rather than strategic, that staff with marketing responsibilities often lack basic training, that marketing efforts are neither goal-driven nor measured, and that marketing activities are seriously under-resourced.

DEI convened a working group of its board and executive staff to explore the contributions to audience growth that could be made from within its professional disciplines and for which DEI might take particular responsibility. The 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 Public Radio Program Directors Association board also recently flagged marketing as “a core skill and essential ongoing activity at stations.”

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 others have – a \$120,000 per year value if used to its fullest extent.”

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 incorporate the following tactics:

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- 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.
- DEI, PRPD, and the networks should create tools to help stations assess their needs and effectively engage outside marketing expertise in their local efforts.
- Marketing in public radio needs to be informed by marketing expertise and experience beyond public radio. In the marketing arena, public radio’s skills are limited and the expertise of others in the profit and nonprofit sector are great resources.

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 sustained program track in the Public Radio Development and Marketing Conference devoted to the concepts, practices, and benchmarks of successful marketing with companion conference sessions conducted at the PRPD annual conference.

6. Market Strategies, Station Solutions

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

In any given market public radio is most successful at aggregating audiences of both significant size and significant diversity when it presents multiple, focused, and differentiated services delivered at a high level of performance. There are three key elements in this equation:

- Enough channels committed to public radio on which to offer different services.
- Strategic alignment of the services – focused, differentiated, complementary.
- Superior performance of each of the services within the context of the specific market.

So how is public radio doing?

The first observation is that there are dramatic differences in the overall performance of public radio at the market level – in both in the percent of the population that tunes to public radio in a given week (cume rating) and the percent of all radio listening that goes to public stations (share).

Of the 50 largest radio markets – where over 75 percent of all current public radio listening occurs – some are served by 5 or 6 in-market public stations and some by just 1 or 2.

Seven of the top 50 markets do not have a full-time public radio news station, 16 have neither a public nor a commercial classical station, 31 have no full-time public radio jazz, and 40 do not have a full-time public AAA station. Several of these markets do have a station that combines two or more of these formats or other kinds of music.

Even where there are multiple stations and program differentiation, we see significant differences in public radio's audience success. Some differences are due to market characteristics that consistently influence public radio listening – education levels, values, and lifestyles principal among them. In other markets stations are simply underperforming relative to their peers.

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In the earliest years of developing the public radio system, CPB funded coverage expansion initiatives to encourage organizations to develop service in markets without a public radio station. In a second wave of expansion, CPB made special one-time grants of up to \$1 million for capacity building at potential “flagship” stations. We believe it is time for another targeted investment in expansion, this time aiming for a new level of accomplishment in audience service.

In this section we explore the key inter-related issues. We start with broadcast channels, move to performance, think about options in the top markets, and finish with tactics and some thoughts about HD.

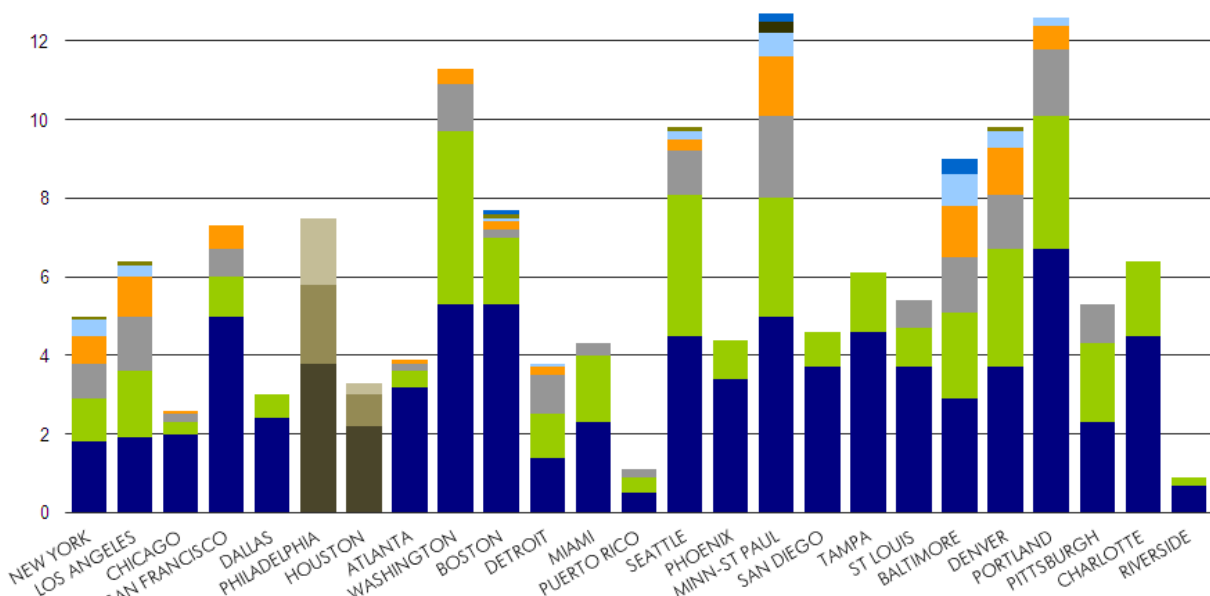
Basic Building Blocks – Broadcast Channels

Broadcast channels are the building blocks of public radio’s service. More channels usually means more service and some communities are clearly better endowed than others.

This chart shows the share of radio listening that goes to CPB-supported public radio stations in the top 25 markets. Each segment of a bar represents a different station.

Public Radio's Share of Listening: Top 25 Markets

Metro Survey Area, Spring 2008



Source: Arbitron; Radio Research Consortium

Station Resource Group

Philadelphia and Houston estimates based on PPM.

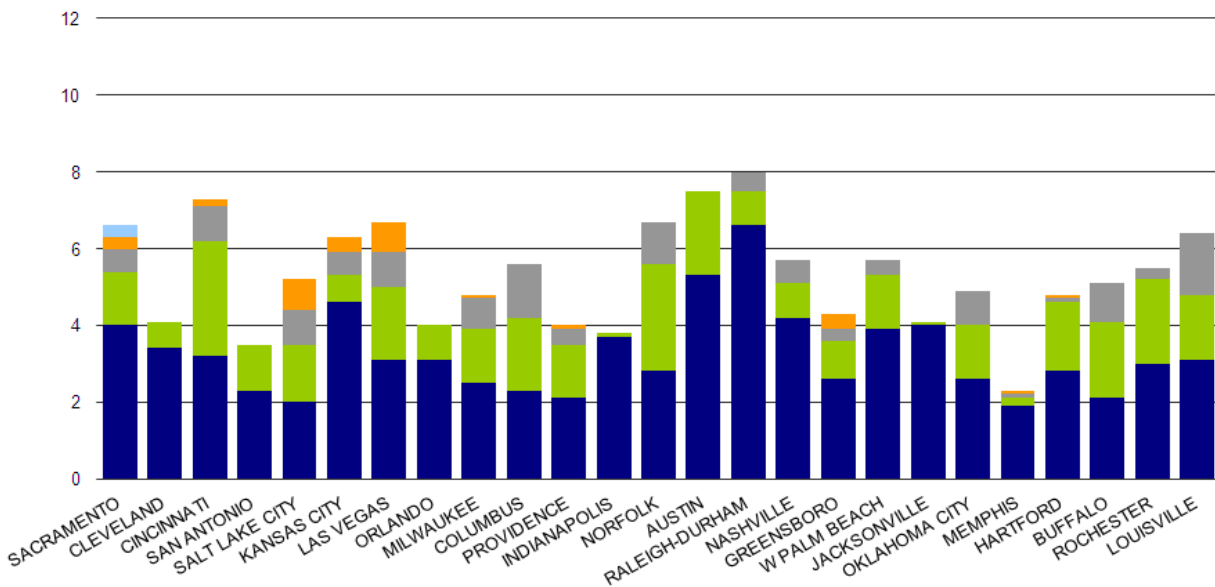
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The chart below presents the share of listening to public radio stations in markets 26 through 50.

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

Metro Survey Area, Spring 2008



Source: Arbitron; Radio Research Consortium

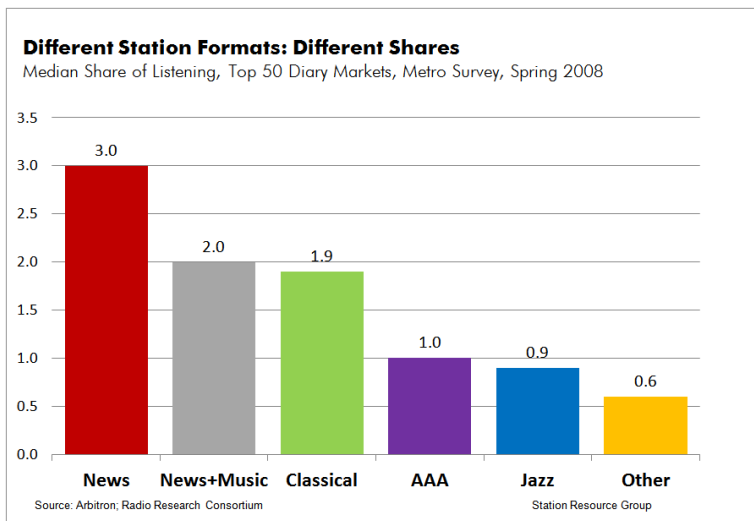
Station Resource Group

Not all of the stations that generate listening in a market are “home” to that market. Sometimes this is a matter of listening spilling over from an adjacent major market, as in the case of Washington, DC, where WBJC in neighboring Baltimore picks up a 0.4% share. In other cases the listening is to stations broadcasting from outside of or at the edge of the market, typically university campuses located at some distance from city centers. The latter is especially the case in third and fourth-ranked stations in markets 26-50.

The number of channels public radio has to work with in any market is clearly an important part of the story. But it is not the whole story.

Performance: Different Formats and Different Markets

In devising market strategies and station solutions it is essential to take account of the different performance of different public radio formats on almost every measure of listening and the interplay of formats and market characteristics.



This chart, presented earlier in the “Music” section of this report, displays the clear differences in the median share of listening to public radio’s different formats in the top 50 markets.

The overall audience service of public radio in different markets is partly a reflection of the different formats that the public stations in that market choose to present.

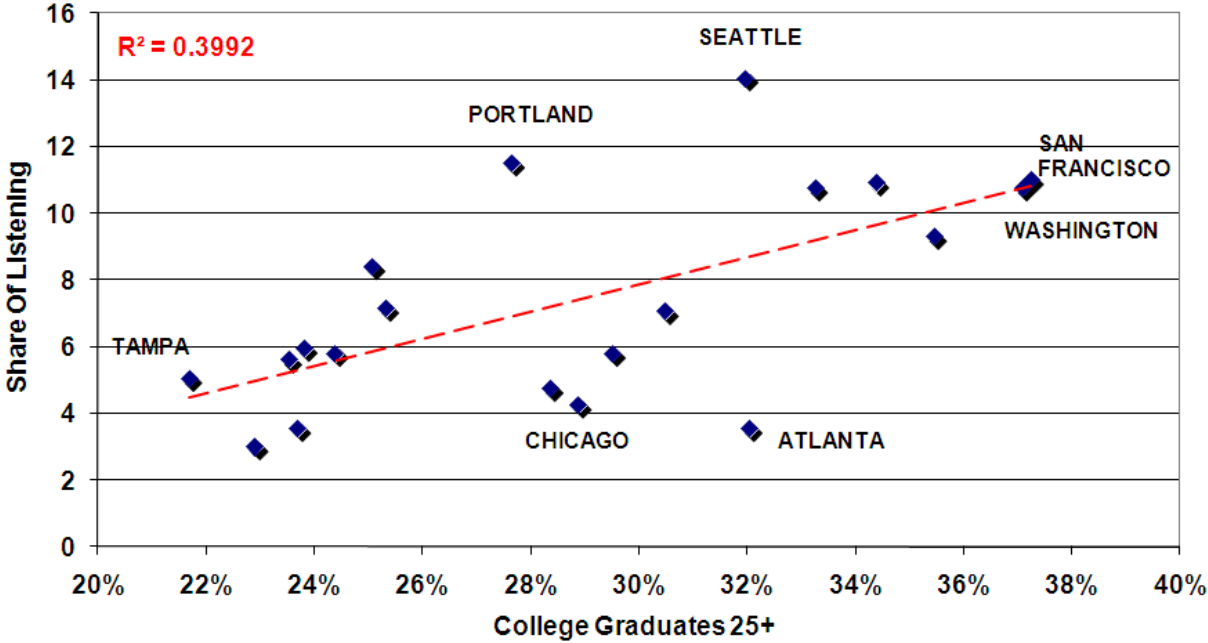
While there is a strong pattern here, it is important to report that there are also significant differences in the performance of individual stations within each of these formats.

In discussing the different audience performance among stations within a given format – those well above the median and those well below – it is not uncommon to hear the assertion that “my market is different.” GROW THE AUDIENCE gave close attention to the notion of market differences and the answer is that markets matter – a lot!

Our first examination of market differences, presented in the GROW THE AUDIENCE *Situation Analysis* report, revealed that education levels in a market are crucial for public radio. Looking at only the percentage of adults 25+ with a college degree, it is possible to explain 40 percent of the differences among different markets in the overall share of listening for public radio.

The chart on the next page shows the pattern.

**Public Radio Share of Listening
By Market Level Of Education**
Commercial Classical Stations Included, Spring/Fall 2007



The percentage of people 25+ with a college degree comes from the 2000 US Census, using its definition of metropolitan areas – not exactly the same as Arbitron’s metros. The share of listening combines all public radio stations in the market plus commercial classical stations – AQH persons 12+, Monday-Sunday, 6am-12m, averaged Spring and Fall 2007. Arbitron estimates and data are copyrighted by and proprietary to Arbitron, Inc.

We included commercial classical stations because public and commercial classical music stations occupy essentially the same market niche – listeners think of them in very similar terms and commercial classical stations serve highly educated listeners that match the public radio profile. In fact, two of the commercial classical stations reflected above are now public classical stations – WQXR in New York and WCRB in Boston.

The red line is the predicted share of public radio listening in the market and many of the stations fall close to the predicted line. For example, Tampa had a low level of education and a low share for public radio. San Francisco and Washington also fell right on the line – each had a high education level and a strong public radio share. But there were also markets that were significantly over-performing the model, such as Portland and Seattle, and markets that were significantly below the predicted share, such as Chicago and Atlanta.

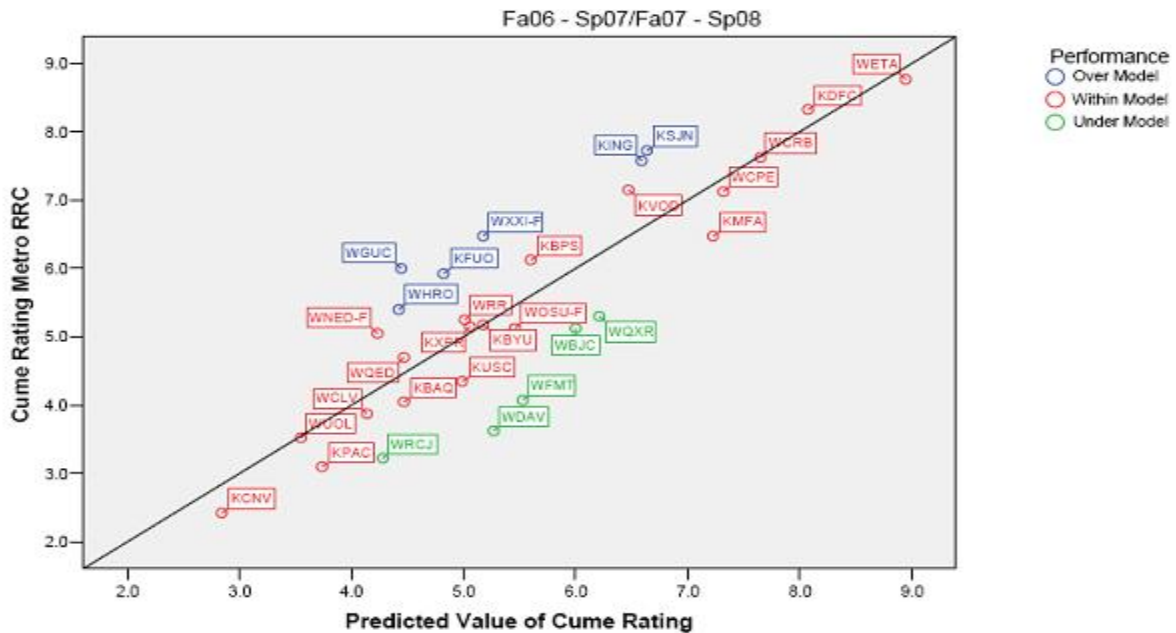
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GROW THE AUDIENCE also examined the impact of market characteristics on classical stations. In this case, only one factor, market education, explained 75 percent of the variance among stations. And after accounting for education, no other factor had a significant explanatory power.

Predicted v. Actual Performance for 30 Large Market Classical Stations

Stations on the right side of the chart have a higher predicted performance based on the character of their market; stations on the left have lower predicted performance. Stations on the diagonal line exactly fit the model. Those above the line perform better than predicted; those below the line perform worse.



The predictive model for classical music dramatically underscores **the importance of crafting market-specific plans for audience service**. In the chart above, both WETA in Washington (upper right) and WUOL in Louisville (lower left) are right on the diagonal line – their actual performance is exactly as predicted. Yet the predicted cume rating for WETA, at 9.0, is more than twice that for WUOL, at 3.5 – Washington is a much more favorable market in which to present classical music than Louisville.

The classical chart also illustrates that market factors are not the whole story and that **we should not be satisfied with either the current level of performance or simple averages among stations**. Based on the character of their markets, the model predicts that that both WRCJ in Detroit (below the line in green) and WGUC in Cincinnati (above the line in blue) should have about the same cume rating of 4.3. But WRCJ’s actual cume rating is just a little over 3 while WGUC’s is twice as large at 6. A similar pairing can be seen between WDAV in Charlotte (below the line) and WXXI-FM in Rochester (above the line).

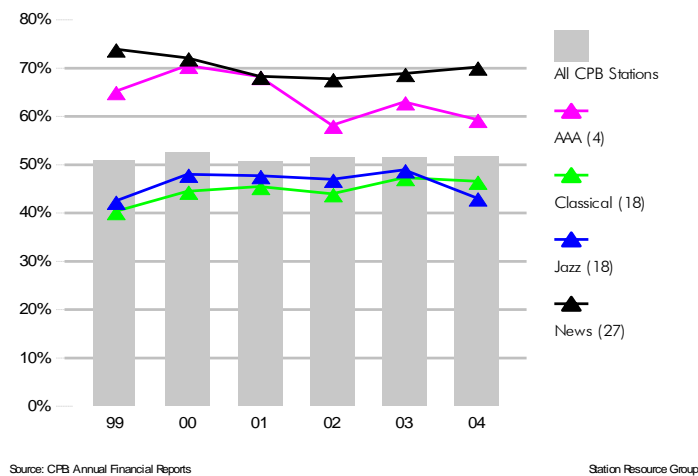
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Another critical dimension in crafting market and station solutions for audience growth is sorting out how to pay the bills. Just as formats differ in their audience service, they also differ in the dynamics of financing them.

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 an earlier SRG study, *The 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 are 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, 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.

We recommend additional 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.

Options in the Top Markets

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.

The nation's 50 largest radio markets account for over 75 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.

Markets 1-25. We recommend four key approaches in the top 25 markets that will increase public radio's audience service.

Strengthen service at underperforming stations. Simply bringing news and classical stations that are below the predicted level of service, given the character of their market, up to the norm would have a measurable impact on public radio's national reach. Our recommendations for needed steps are outlined in the preceding section on "Core Competencies" and earlier sections of the report.

"Align" service at existing stations. Target markets in which public radio's formats are not available in a consistent and focused manner. A positive example is the DC market where WAMU and WETA, after years of both providing a news- and-music service, moved to respectively offering all-news and all-classical formats – leading to growth in listening to both stations.

Develop new services on existing public radio stations. Examples include Los Angeles, where an initiative is underway to develop a new service targeting a younger, predominately Latino audience and Milwaukee, where jazz was replaced with a format aimed at younger listeners. These new services are unproven, but format innovation is a critical step toward new listeners for public radio.

Create opportunities for new services by gaining control of additional stations through acquisitions or operating agreements and by upgrading limited coverage signals. In Miami American Public Media purchased a religious station and brought the classical format to town. In the Seattle-Tacoma market Puget Sound Public Radio took over operations at KXOT after it was purchased and upgraded by Public Radio Capital.

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Markets 26-50. We recommend approaches in markets 26-50 that, in addition to the above, center on differentiating services of existing stations and adding stations with full market coverage through upgrades or acquisitions.

The approaches we recommend for markets 1-25 all apply in the next tier of markets as well. In addition, a number of these markets have only 1 or 2 stations that provide full market coverage. Efforts to remedy this situation – through power increases, station relocations, or acquisitions – would have a major impact in several markets.

Acquisitions, Operating Agreements, and Mergers

Acquisitions, operating agreements, mergers and creative signal coverage solutions have played an important role in public radio expansion. By reinforcing these strategies, along with targeting new audiences, developing new formats based on market-driven approaches, and creating strong and complementary online services, public radio can extend this path to more service.

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 WNED pioneered adding stations and delivery capacity through purchases. 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 more organized and aggressive management of an emerging noncommercial station marketplace to both protect and increase public radio's assets and delivery capacity. The Station Resource Group, with support from CPB and others, developed and launched Public Radio Capital 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. Other parties have played a critical role in public radio acquisitions and management agreements over the past decade, but the PRC "story" offers a focused window on this activity because of the collection and aggregation of the associated audience data.

Over the past seven years, 31 PRC transactions involved signal expansion or services differentiation projects that involved acquisition of a non-public radio station. Spring 2008 Arbitron data indicate these service changes led to an increase in public radio's average audience (AQH) of 21,400 listeners. During the same period seven additional public radio stations worked with PRC to take over operations of

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stations that might otherwise been sold to operators outside the public radio system. Spring 2008 data showed an increase for these stations' average audience by 7,400 persons compared to prior operation.

The combined gain of 28,800 average listeners from these 38 projects 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 financial 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 acquisition financing on their own, using such techniques as “internal borrowing” from parent organizations such as universities, through commercial borrowing with local banks, or through community fundraising. Other organizations have accessed the Public Radio Fund (operated by PRC), which now has nearly \$9 million in loan commitments from various foundations and individuals.

A look at ten PRC public radio projects gives context to the debt service associated with acquisitions. 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 \$3.5 million in 2006 and \$3.4 million in debt in 2007. In some cases the cash is generated from listener and underwriting revenues and in some cases it is financed 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. And changes in the larger economy, such as the current national recession, can upset the best-laid business plans.

But for those who can stomach the risk and manage the process, the rewards can be dramatic.

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 organization holding the station license can divest itself 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 an outright purchase.

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. Examples include: Public Broadcasting Atlanta operates the Atlanta School Board’s WABE; Southern California Public Radio operates Pasadena Community College’s KPCC; Prairie Public operates stations owned by the University of North Dakota and North Dakota State University; Puget Sound Public Radio operates the University of Washington’s KUOW; and WFCR, the University of Massachusetts station in Amherst, operates an AM station owned by commercial broadcaster Clear Channel.

Mergers and Consolidations

Public radio has seen relatively few outright mergers – two or more separate entities combining 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, Louisville Public Media, and Iowa Public Radio.

These kinds of consolidations are not without their bumps along the way. Different organizational cultures need to be integrated, personnel and facilities need to be reconfigured, and the consolidating parties often have some uncertainties as to whether their interests are being protected and their objectives are being realized. 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 challenging path.

Current Prospects

The current economic environment creates risks, opportunities, and challenges in the noncommercial station market. For many stations, all major sources of revenue are under stress; a few stations report

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dire circumstances that threaten continuity of operations at current levels. Most public radio stations will be able to “hunker down” through this period but a few will not. Matters are particularly problematic for stations in difficult circumstances that are operated by entities with other activities and priorities, such as universities, colleges, and school boards.

At least a few public radio stations are likely to be divested by institutions seeking financial relief from the obligations of owning and operating a station or the cash infusion that would come with a station sale. Less likely, but also possible, would be independent organizations – community licensees – deciding to “throw in the towel.” In any of these circumstances, public radio must be alert and agile to preserve current coverage and services – and perhaps improve them – through acquisitions, operating agreements, consolidations, or other solutions.

Noncommercial stations outside the public radio system are also feeling the pressures of the economy – religious broadcasters, institutions and community groups operating non-CPB-supported stations, etc. This may create opportunities for public radio organizations in more robust financial health to acquire or operate stations on favorable terms. That will in turn lead to more public media service differentiation that will contribute to listener growth and loyalty.

Investment Requirements

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 would constitute a meaningful and 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. The investments would need to be supplemented by grants from foundations, individual major gifts, and CPB support.

These figures may seem daunting 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 network 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.

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HD Radio

Public radio has invested heavily in conversion to digital broadcasting. Of 908 public radio transmitters tracked by CPB, 516 have been converted to digital transmission and 143 projects were underway. There are 240 stations that have neither completed a digital conversion nor begun a project to do so.

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 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 has been reviewing how to remedy these issues, weighing the possibility that solutions for digital reception will cause interference for stations continuing to broadcast in analog. A decision that will allow most stations to increase their digital power levels is expected at the end of 2009 or in early 2010.

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 most digital receivers as a costly premium product. Current estimates are that receiver purchases to date total around 1.5 million.

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 may look to "ultra-niche" services and innovative financial models to develop sustainable HD2 and HD3 service plans or may find that online digital options present more attractive and financially sustainable opportunities.

7. Follow-up and Accountability

Establish responsibility and accountability, nationally and locally, for these recommendations through an annual review of public radio’s performance in audience service. The assessment should include perspectives of multiple constituencies, organizations, and individuals and result in a progress report to the public radio system.

Plans and recommendations such as those presented here face inherent challenges. The arc across which the plans play out is long. Success depends upon support and participation from many entities. No one group or person is truly in charge. Task Force member Frank Cruz, a former chair of the CPB Board of Directors, exhorted CPB to support “Someone to monitor the system’s progress toward addressing the recommendations of the report 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.

- 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.
- Each 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 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.

The Audience Goals

We challenge public radio to pursue ambitious goals for the use, reach, and diversity of public radio's audience.

- USE** Increase by half the average audience – the number of people using public radio at any given moment across the broadcast day. This means public radio will claim some 7.5 percent of all measured listening to radio.
- REACH** Double the weekly cumulative audience – the number of people who use public radio each week on air, online, and through other networked services. This means public radio will reach about one in five Americans age 12 and older.
- DIVERSITY** 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. This means a larger share of a larger audience for people of color.

These are “aspirational” goals, points of focus and motivation that, if realized, will transform public radio's role in American life. They are not a calculated forecast based on predicted outcomes of the many measures we recommend. But neither are they a “hope and a prayer.” Rather, they reflect a consideration of public radio's past growth, current circumstances, and many opportunities – along with patterns we see emerging as the radio industry changes its basic audience measurement tools.

In this section we will look back at public radio's audience performance and other key indicators, discuss changes in measurement tools, and review our thinking in framing the goals above.

How Are We Doing Now?

Over the past year more people tuned in a public radio station, more people visited a public media website, and more people were accessing public radio content at any given moment – on an array of devices – than ever before. Listening to public radio by African Americans and Latinos was at an all-time high. By most any audience metric, public radio is currently doing quite well. How does this performance compare to earlier years?

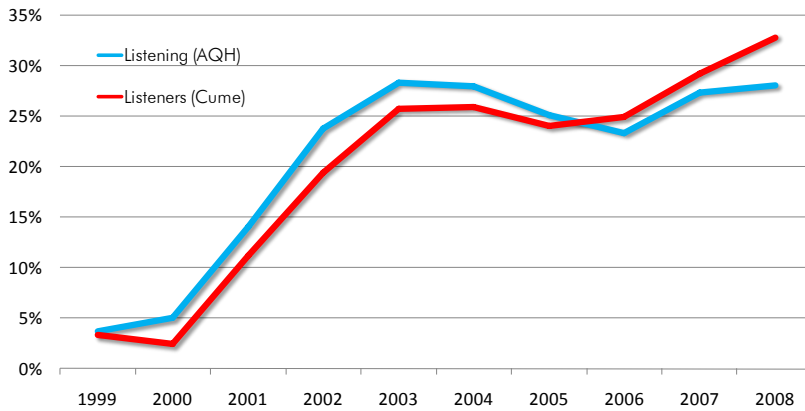
If we go back a decade, matters start on a disappointing note. From 1999 to 2000 the cumulative audience for all CPB-supported stations declined – the first such drop ever – and the average audience grew by only 1.3%. But this was followed by a dramatic, three- year audience surge associated with an intense series of news events – the 2000 Bush v. Gore election, the September 11, 2001 attacks, and the beginning of wars in Afghanistan and Iraq.

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Cumulative Change in Public Radio Listening and Listeners

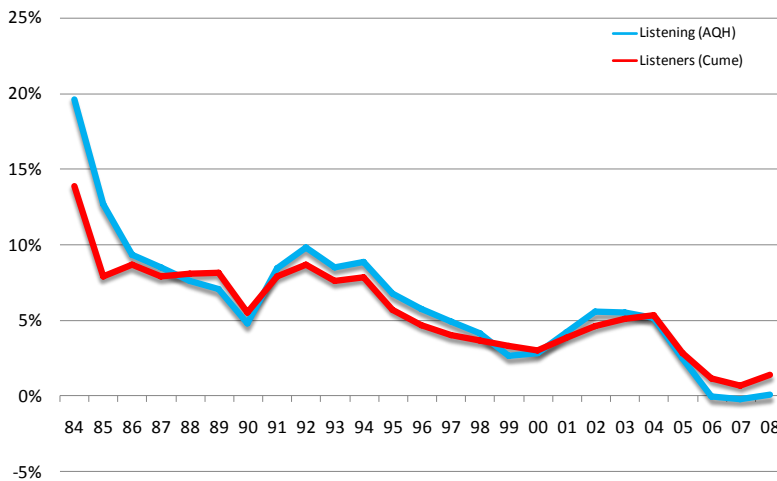
Percent Change Since 1998, Mon - Sun, 6am - Midnight, Persons 12+



Source: Arbitron Spring Nationwide, Radio Research Consortium

Annual Percent Change in Listening and Listeners

All CPB-Supported Stations, Trailing Four-Year Average



Source: Arbitron Spring Nationwide, Radio Research Consortium

Then **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.**

Looking over the broad sweep of the past twenty years 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. It is important to remember, though, that as the audience grows, a percentage point of growth equals larger numbers of listeners.

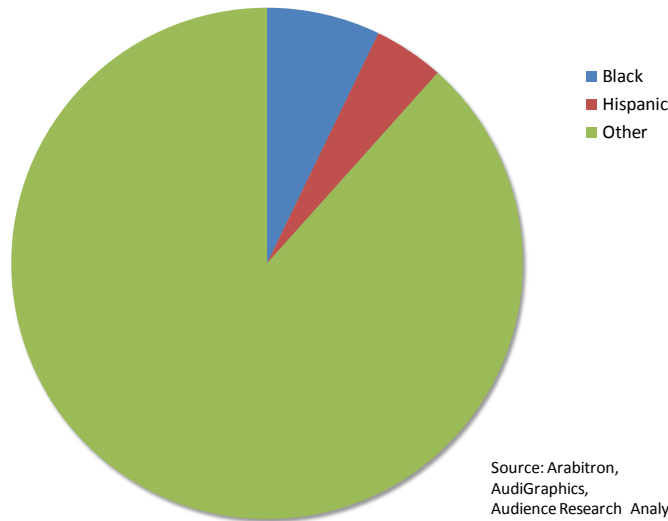
Listening to public radio by Blacks and Hispanics, the two racial/ethnic groups tracked by Arbitron, also grew significantly over the past decade. Before looking at the data, it is important to note that listening estimates by race and ethnicity are not available for all markets. Of the 410 public radio organizations supported by CPB, only 219 stations have estimates of Black listening and only 150 have estimates for Hispanics. These are stations serving markets with the largest numbers of Blacks and Hispanics, of course, but some portion of Black and Hispanic listening simply goes unmeasured. Arbitron does not provide estimates for Asian or Native American listening at all.

grow the audience

Public Radio in the New Network Age

Listening by Blacks, Hispanics and Others

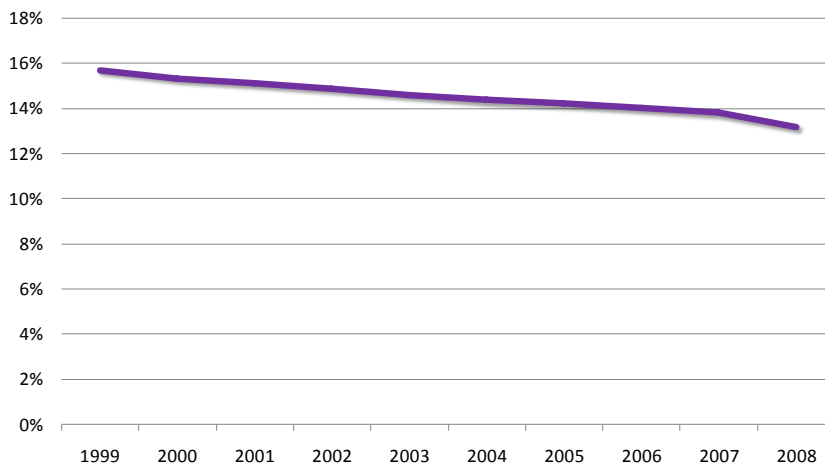
All CPB-Supported Station, Mon. - Sun. 6am to Midnight, Spring 2008



In Spring 2008, there were an average of at least 125,700 Black listeners in public radio’s average audience throughout the day. There were an average of at least 78,000 Hispanic listeners. We say “at least” because there was also listening by Black and hispanic listeners in markets where the populations are too small to track accurately. Together, measured listening by these two groups represented 11.6% of the overall average audience for public radio.

AQH Rating for All Radio

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



Source: Arbitron Spring Nationwide, Radio Research Consortium

Growth in public radio listening is, to some degree, “swimming against the tide.” While radio has proved to be the most resilient of “legacy” mass media, with each passing year the percentage of Americans listening to radio at any given moment has declined a small amount. 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.

At the same time, any erosion in listening to local AM/FM radio is offset by continued growth in the number and capacity of other platforms and devices on which Americans can find radio and other audio programming: online streaming, cell phones, podcasts, and satellite radio to name the most prevalent. These technologies present opportunities for public radio to extend the use of existing content and develop new public services for current and new user communities. It will be some time, however, before we have use and value metrics that we can readily set alongside those for broadcast radio.

New Measurement Systems and Platforms Require Dynamic Goals

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

Arbitron, the principle source of public radio's audience information, is transitioning from audience estimates based on survey respondents' reports in a diary to estimates based on monitoring of survey respondents' exposure to radio with Personal People Meters (PPM). The conversion is being made in the largest 50 radio markets across the country.

The two systems produce different results, reshaping our understanding of how people use radio. Early results of metered listening compared to diary reporting of listening indicate that people listen to radio in different patterns than they reported in diaries. In general:

- Listening is more fragmented than people reported in their diaries.
- They listen to (or are exposed to) more stations than they wrote down.
- They listen for smaller amounts of time than they say they did.

These differences, while true across the radio dial, also vary in important ways by market, formats, and dayparts. We are setting goals for public radio performance informed by a diary-based history but progress toward those goals will be assessed using meter-based estimates for many stations.

For Spring 2009 Arbitron reported PPM-based audience estimates in 17 major markets. The impact of the new system on public radio was significant. We examined 46 public radio stations in these markets with diary-based estimates in Spring 2008 and PPM-based estimates in Spring 2009. 44 of the 46 stations saw a loss in their average audience; 2 small stations experienced no change. The combined AQH loss was 37% across all 46 stations. (Mon – Sun, 6am to midnight, persons 12+ in 2008, persons 6+ in 2009) These 46 stations accounted for over a third of public radio's total AQH in Spring 2008.

In contrast, the weekly cumulative audience grew for 36 of the 46 stations from the Spring 2008 diary estimates to the Spring 2009 PPM estimates.

The connecting variable between cumulative audience and AQH is the average time spent listening to the stations and it appears that two factors are at work to reduce this key measure:

- Arbitron's meters are capturing more occasions of listening to stations than people reported in their diaries. But a portion of this "new listening" is transient, incidental, or unintended, as evidenced in reports of one and only one brief occasion of listening to a station in the entire week.
- "Regular listeners," those who show up several days a week and make the station one of their top two or three choices, reported more listening in their diaries than is captured by the meters, as evidenced by listeners who may have reported that they listened to a station "all day," when in fact their listening was interrupted numerous times.

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All together, the average weekly time spent listening for the 46 diary-to-meter public radio stations discussed above declined from 5:44 to 3:12, a 44% loss. The news was slightly better for the top-ranked public stations in each of the markets – the decline was 37%. The average loss in time spent listening, for both the top-ranked stations and for all the stations taken together was the same, about 2½ hours.

The character of these changes will continue to evolve. Diary-to-meter changes have varied among markets and Arbitron intends to convert at least another 23 markets to PPM. Further, Arbitron is continuing to refine its PPM methodology – to secure Media Ratings Council accreditation for its new system, to address complaints from its client base, and to respond to an array of inquiries from various public officials. These refinements, though, are unlikely to alter the broad directions of change that are now evident.

It is important to remember that a change in measurement system does not mean that the actual audience has changed, only how it is perceived. The people who are listening to public radio stations and public radio programs when Arbitron estimates their number through metering a sample are the same people who were listening when Arbitron estimated their number by asking a sample to write in diaries. The value of a radio service to those who come to rely on it is unchanged. And so on.

But we will clearly need to restate audience goals, locally and nationally, once we have a clearer sense of “the new normal” and a baseline from which to build. We will need to recast trend lines within the new framework. We will need to recalibrate relationships among key listening metrics – cume, AQH, time spent listening, loyalty.

Changing Platforms. If the changes at Arbitron are not perplexing enough, public radio must also incorporate the use of its programming and services on non-broadcast platforms into an overall assessment of audience service. Across the next five to ten years, a growing portion of the service public radio stations, producers, and networks offer will be delivered on platforms and devices other than AM and FM broadcasting – the Internet, mobile telephony, satellite broadcasting, and perhaps others. Many these services will be very radio-like in all but the mode of delivery; others will incorporate text and image and new forms of interaction with users.

The field needs reliable and uniform measurement systems to track use and performance across devices and platforms. This is a need public radio shares with the broader radio industry and electronic media providers generally. For the moment, however, technology change and audience behavior are evolving more rapidly than the capacities of those who measure listening and use. Measurement systems now used for different platforms and devices are as different – more so – than the meters and diaries in the broadcast space.

Dynamic Goals. All this suggests that audience service goals set for public radio in mid-2009 should be viewed as dynamic, marking a sense of direction, rate of growth and scale more than precise numbers. As changes in broadcast audience estimates settle to a new system and as measurement on new platforms and devices matures, public radio must regularly update its targets and benchmarks.

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Public Radio in the New Network Age

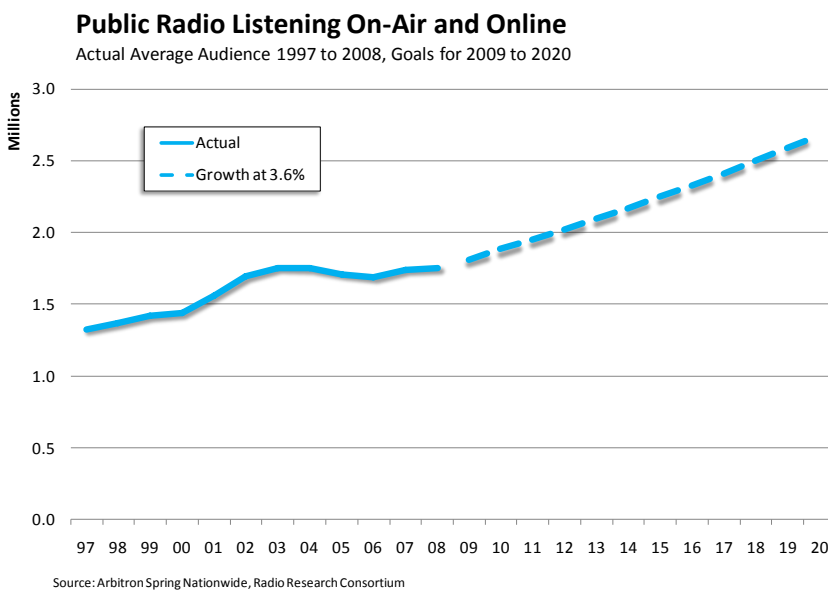
A Goal for Use

The amount of listening to public radio is indicated by the average quarter hour audience (AQH). It reflects a combination of how many people are listening (discussed below) and how much time, on average, those listeners tune in. Close attention to both these factors is important not only in public service terms, but also for the portion of public radio’s business model that depends upon listener contributions. Listeners donate to public radio when it becomes a regular and important part of their lives. Programming strategies that build that relationship also build listener income.

In Spring 2008 public radio reached an average audience of 1.75 million listeners throughout the broadcast week (Monday through Sunday, 6am to midnight average quarter hour audience). This baseline may require a substantial “reset” as Arbitron completes the roll-out of PPM measurement. As noted above, stations in the largest markets have experienced a 37% drop in AQH associated entirely with the introduction of PPM-based estimates in Spring 2009 compared to Spring 2008.

Once public radio is past the measurement conversion, however, what should be the goal for a long-term pattern of growth in use? In the 12 years leading up to 2008, the average annual growth rate in AQH listening was 2.6 percent.

Our recommended goal is to increase the use of public radio by half. This goal includes listening to public radio programming on all platforms – on-air, online, on mobile devices, and other uses in the networked environment.



Public radio must achieve an average annual growth rate of about 3.6% to meet this mark by 2020.

The chart at left illustrates the pattern of growth we recommend relative to the pattern of actual change in AQH during the preceding years.

grow the audience

Public Radio in the New Network Age

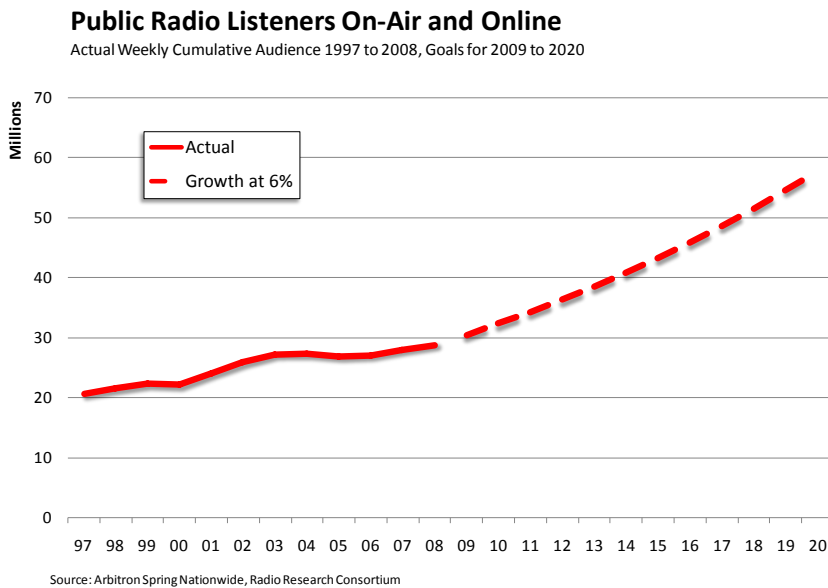
A Goal for Reach

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). The average annual growth rate in cumulative audience was 3.2 percent.

The conversion to PPM-based estimates of audiences so far appears to lead to modest increases in the total number of people who listen to a public radio station at least once each week. While the numbers are moving in a different direction than with time spent listening and thus average audiences, it will be just as important to establish a new baseline for reach.

As public radio is increasingly able to track the reach of its programming and services on platforms and devices beyond on-air broadcasting, we anticipate such uses will accelerate the growth in public radio's reach

Our recommended goal is to double the reach of public radio. This goal includes listening to public radio programming on all platforms – on-air, online, on mobile devices, and other uses in the networked environment.



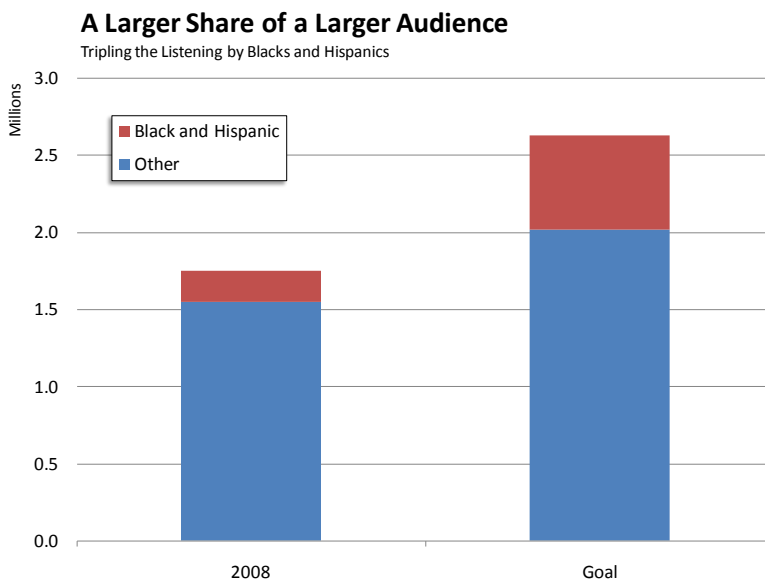
Public radio must achieve an average annual growth rate of about 6% to meet this mark by 2020.

The chart at left illustrates the pattern of growth we recommend relative to the pattern of actual change in cumulative audience during the preceding years.

A Goal for Diversity

In Spring 2008 the average audience for public radio included at least 203,700 Black and Hispanic listeners. Like all other measures, these figures may require some post-PPM-conversion fine tuning. We have yet to ascertain the character of any such changes.

Our recommendation is to triple the amount of listening by people of color to public radio. By five or ten years from now our ability to track listening by an array of racial and ethnic groups may have improved. But until then, our recommended goal implies reaching an average audience of at least 611,000 Black and Hispanic listeners.



In concert with our goal for increasing the overall listening to public radio by half, this suggests a larger role for people of color in a larger audience overall.

Black and Hispanic listening would rise from at least 11.6% of the average audience to 22.2% of the average audience.

Epilogue: Renewing the Vision

Our plan for audience growth rests on a strong sense of confidence within public radio – confidence that comes from the strength and continuity of core elements that define the field as a whole and the organizations within it. These elements are important to highlight and affirm as we move forward.

Public radio **shares a public service mission** that guides our work. Each of the hundreds of organizations across public radio has its distinctive character and purpose, but we also share many commitments. We are united by powerful, recurring themes that cut across our different stations and networks, our different producers and formats.

A better life. At the individual level we aim to help people lead a better life – more thoughtful, joyful, and useful; more fulfilled in the pursuit of understanding, challenge, and personal growth. We help people “connect the dots” in a complex world so they can work toward solutions in their lives and their communities. We provide moments of beauty, refuge, and reflection – along with humor and occasional just plain fun.

A healthy community. We are deeply invested in the health of our communities, which we seek to understand, serve, and care for across many dimensions of public life – education, arts and culture, economics, the environment, health care, the sense of connection to others, and more.

A strong democracy. We support the vitality of our democracy with the free flow of ideas that sustains a free society, accountability for those who govern, and information that helps citizens make good decisions as they participate in civic life.

Our plan for public radio also affirms the strength of public radio’s **strategic position** – our unique place on the media landscape. This position is anchored in public radio’s broadcast service but extends to other communications platforms and services.

Trusted content. The foundation of public radio’s current success and future prospects is content of quality, depth, and authenticity. The public’s deep trust of public radio, compared to other media sources and other public institutions, is confirmed in poll after poll, study after study.

Local connections. We have strong ties to local communities across the nation, over 400 stations controlled and managed at the community level, where they create a significant portion of the content they present.

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National networks. We multiply our impact through the leverage and scale of multiple networks – national and international reporting, homes for first-rank hosts, journalists, producers, artists, and technologists, and aggregated resources to launch ambitious and innovative projects.

Our plan for public radio is shaped by the **autonomy and independence** of the many entities that make up public radio, which we believe is an enduring dimension of the American system of public media. Public radio’s local and national organizations are responsible for making their own decisions about programming and services and for finding the majority of the resources needed to sustain their operations. Broad goals, plans, and recommendations for public radio ultimately turn on priorities, decisions, and actions by many different players – collective action must be organized and willing; it cannot and should not be imposed.

Renewing the Vision of Service

Even as we affirm the strengths of public radio’s shared mission, strategic position, and commitment to local autonomy, we also know that public radio must continually renew the vision that guides its service. This is a theme sounded throughout our inquiry.

"We are in a radically changing media landscape. I want us to achieve higher impact and wider reach for public radio. That might be through doing a better job in our core services and it might be through new formats." Bruce Theriault, Senior Vice President for Radio, CPB.

"We’ve done a good job of saying what we know, and these efforts must continue. The harder part is moving beyond what we know to achieve something bigger and better." Laura Walker, President and CEO, WNYC Radio.

"What is the ‘new missing’ that we should speak to as we go forward? What are the new roles we can play even as we continue with our traditional strengths?" Vivian Schiller, President and CEO, National Public Radio.

We must address the continuing renewal of vision and strategy by putting those we serve – listeners to our stations, users of our broader services, and our communities as a whole – at the center of the exploration. We must engage with listeners and community leaders throughout the planning, design, development, and presentation of our programming and services.

Kit Jensen, Chief Operating Officer at Cleveland’s ideastream®, in a GROW THE AUDIENCE interview, suggests that vision and strategy starts with local community leadership, their view of the community’s needs, and their vision of how to serve those needs. From there, she says, the needed content focus and platforms of delivery can be determined.

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“This kind of goes back to the old-fashion ascertainment stuff. If you can get your customers or your audiences to tell you what they want and then you do it, then you’re aligned. It is interesting, we say that we want to know a lot about our audiences and we want them to be interactive. But we – our journalists – actually resist and we infrequently ask what they’re interested in and then act to be responsive.”

Others frame the issue in terms of strategic marketing. A GROW THE AUDIENCE working group of executives and board members from DEI, public radio’s fundraising and marketing service organization, recommended:

“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.”

Strategic marketing moves beyond “we have built it, let’s get them to come” to focus on a match between individual and organizational goals. Jon Schwartz, General Manager of Wyoming Public Radio (and former NPR board chair), urges public radio to employ:

“solid marketing approaches that identify unserved segments, develop understandings of the needs of each segment, assess what public radio might be able to offer each, prioritize which can best be served by public radio – and then develop formats to serve them.”

Whether we call it ascertainment, alignment, strategic marketing, or something else, public radio, at the highest levels, must ask “What are the indispensable roles we can play in people’s lives?” This requires shifting from an “inside-out” focus on current programs and formats to an “outside-in” focus on listener needs, uses, and behaviors. It means recalibrating the value of core franchises in a changing environment and looking for extensions of current strengths to new roles we might play.

The continuing renewal of vision and strategy must happen at both the national and local levels.

The Corporation for Public Broadcasting, public radio’s national networks, major philanthropies and public agencies, and other national organizations can provide both leadership in setting broad directions and support for efforts at the community level.

Individual stations and their partner organizations must take up these questions, too – examining the needs and interests of their own community, identifying segments they might best serve based on past experience and future ambitions, and making the tough trade-offs of deciding not to do many things in order to do the most important things well.

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This is important and complex work. The research and other explorations of needs, segments, and opportunities can be costly. But it is a critical next stage in moving from the territory we know to new and compelling service and moving from the broad recommendations we have developed and present in this report to the action steps that must come next.

Toward a Portfolio Strategy

Public radio is well into a new network age for electronic media. Content flows across multiple, interconnected platforms and channels. Regulatory and capital barriers to media technologies are shifting. Individuals assert their increasing ability to choose, control, engage with, and create their media experiences. The new network is the Internet, “new media,” “mobile,” and more. It is an attitude that leaps across traditional categories and pushes at boundaries between creators, presenters, and users.

Within this evolving electronic architecture it is clear that the dominant dimension of public radio’s service and the greatest near-term opportunities to increase value and use are in broadcasting – terrestrially-based radio signals that are omnipresent and freely available to everyone. As we pursued this project, public radio was reaching the largest broadcast audiences in its history, some 30 million Americans using public radio each week, over 1.7 million listeners tuned in at an average moment through the day. Even incremental improvements in this performance will affect huge numbers of people; more substantive change built on this foundation is all the more powerful.

At the same time, public radio has extraordinary opportunities created by the tools of the new network age – to make its great content more broadly and easily accessible, to engage with people in new ways, and to enlarge its public service offerings to communities and the nation in ways that go beyond broadcasting. These efforts will, in turn, reshape the character and focus of the broadcast service.

Our plan recommends a path forward for public radio that exploits the enduring, powerful role of broadcasting well into the next decade, and the significant, still-unrealized broadcast opportunities that public radio can seize in so many communities. Just as surely, we recommend that public radio fully embrace the Internet and other networked communications as a primary means of distribution, connection with audiences, and broadening of content sources.

This 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.

We in public radio can do better and go farther with what we now do and with the listeners, and others just like them, we now serve. We need relentless attention to the experience of those who come to our stations and use our expanding services; more consistent execution of our signature programming, our

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websites, and other platforms; and more effective organization and use of our assets. Many of our recommendations point in just such directions. The returns in use and reach of public radio will be significant. We will deliver more value to our audiences and to our communities.

We must also do more, innovating in the form and content of our work to reflect a changing media environment, to exploit the tools of the new network age, and to go deeper into our mission than the resources of an earlier time would sustain. Similarly, we can look to people who are now at the edges of our audience, and beyond, and find ways to welcome them in through changes in both the character of our organizations and the cultural sensibilities we present. Many of our recommendations point to these kinds of changes, knowing full well they are potentially disruptive to current models.

Continuity, Change and Growth

Public radio's evolution to a new level of audience service will be led by stations, national organizations, and new public media partners that are both assured in their enduring strengths and values and committed to change, and growth. The individuals and organizations who will shape the next arc of audience growth are reaching toward a larger success, something 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 our recommendations 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 and growth that will have several key features:

- **Coalitions of the committed.** Action will center on those ready and willing to change in meaningful ways. While funders and regulators can offer “carrots and sticks” to shape behavior, the change public radio needs must come from within stations, networks, and producers. In public radio's highly decentralized structure, each of some 400 organizations sets its own strategy and makes its own choices. Not everyone will participate in a campaign.
- **Thoughtful segmentation.** Public radio spans a wide range of services, circumstances, and resources. Our broad goals embrace these diverse realities. 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. A campaign for meaningful change in public radio will not have one-size-fits-all solutions.
- **Integrated efforts.** 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.

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In both the service we provide and the audiences we serve, our plan for wider use and deeper value is a mix of continuity and evolution, enduring strength and bright vision forward.

We see an opening pathway toward change. We see enormous opportunity for growth.

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