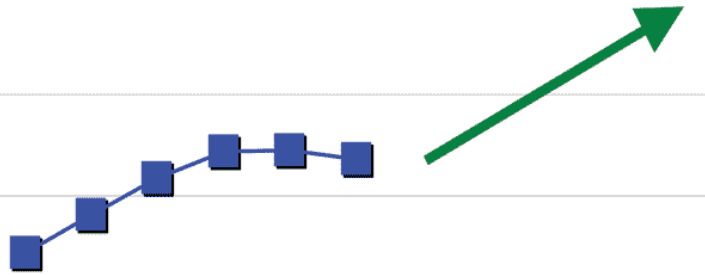


AUDIENCE 2010



Reinvigorating Public Radio's
Public Service & Public Support

INTERIM REPORT 7

21ST CENTURY TRAJECTORIES

AUDIENCE 2010

is a project of

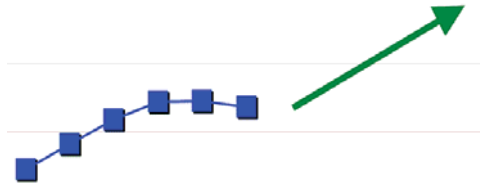
Walrus Research
&
AudiGraphics, Inc.

for the

Radio Research Consortium

May 16, 2006

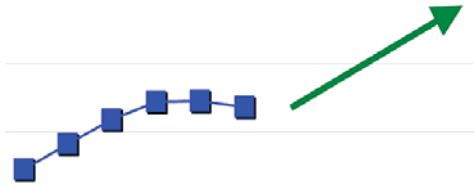
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All audience estimates in this analysis are based on radio listening as recorded and copyrighted by Arbitron.

Fall 2005 opportunity estimates are courtesy of Audience Research Analysis.

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Key Findings

Public radio stations are not flying in perfect formation.

Some are just cruising along. Some are climbing on upward trajectories of public service, while others are diving as they lose audience.

Public radio has lost audience momentum because gains made by stations that are still climbing have been negated by stations that are diving.

Some of the largest stations in public radio have reversed their trajectories from climbing to diving, with huge impact on national audience momentum.

Indeed, stations on downward trajec-

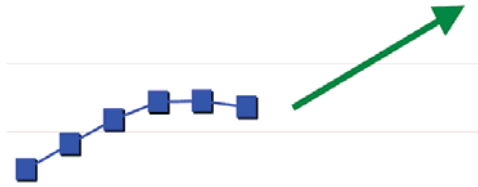
ries are totally responsible for public radio's loss of audience momentum.

Diving, cruising, and climbing are not linked to certain formats or programs. Many news, music, and mixed-format stations are in decline. And some news, music, and mixed stations are in ascent.

Nor is diving a return to normal after the audience influxes attributed to 9/11. In fact, stations on steep downward trajectories are now serving fewer listeners than they did in 1997.

Station trajectories may be influenced by changes in the competition. But external forces don't set their flight plans.

The trajectory of any station remains under its pilot's control.



SIDEBAR

Divers, Cruisers, & Climbers

We created three cohorts of stations to address the question, "Why has public radio's national audience momentum stalled?"

The question asks where listening is being lost – or at least not gained. It asks what stations are dragging down public radio's rate of growth.

Stations that have lost listening are responsible for the national loss of audience momentum. We call these stations **Divers** – their audience trajectories are heading downward, like a squadron of planes in a coordinated dive.

Of course, some stations have gained listening. We call them **Climbers** – their audience trajectories are on the rise, like a squadron in ascent.

The remaining stations – **Cruisers** – are bumping along on currents; sometimes up,

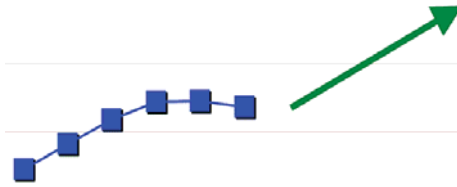
sometimes down, but essentially level in comparison to Divers and Climbers.

It's important to remember that AUDIENCE 2010 concerns itself only with each station's **vector of change** in recent years – regardless of where it started. It incorporates no other performance assessment whatsoever. It is not a report card.

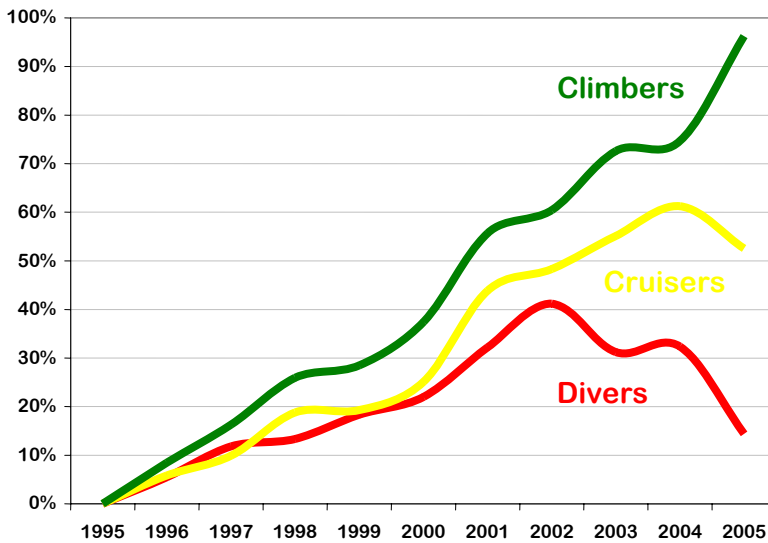
Consider a station that began with a large share. It may have lost audience in recent years yet still have a respectable share.

Similarly, consider a station that started with a small share. Even though its trajectory may be up, its service to listeners may still be less than commendable.

In short, a **Diver** may still be a high flyer, a **Climber** may still be close to the ground, and a **Cruiser** may be coasting at either a high or low level of audience service.



Three Trajectories
(Change in Listening to Public Radio, Since 1995)
Public Radio's Arbitron Diary Database



Graph 1

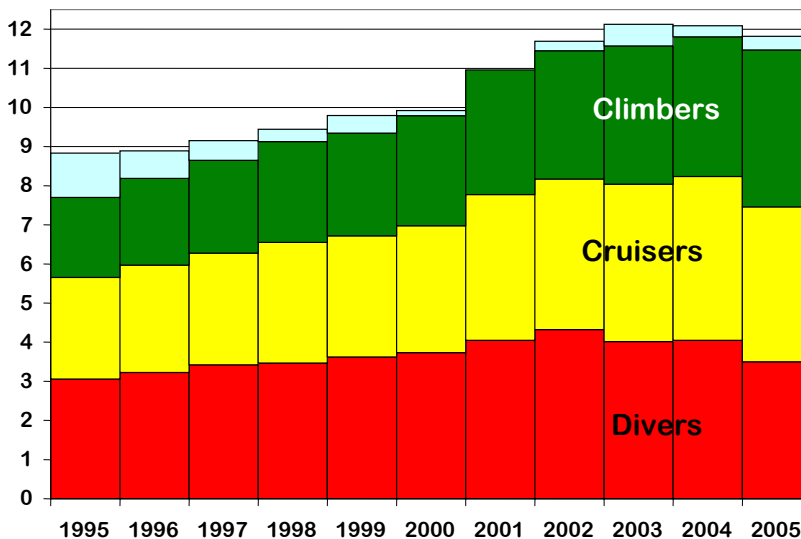
AUDIENCE 2010 segments stations into three cohorts based on audience growth and decline since 2002.

It focuses on **extended trajectories** rather than on dips and bumps.

Divers have lost listening since 2002. **Climbers** have gained it. **Cruisers** have lost whatever listening they may have gained since then.

The listening lost by Divers has offset the gains of Climbers.

Listening to Public Radio
(Listener-Hours per Year, in Billions)
Public Radio's Arbitron Diary Database



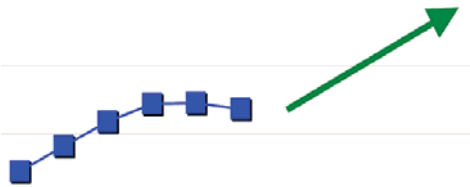
Graph 2

Climbers, Cruisers, and Divers each generate about a third of all public radio listening today.

Climbers' gains have masked Divers' losses for several years.

2005's losses among both Divers and Cruisers were too much for Climbers to offset.

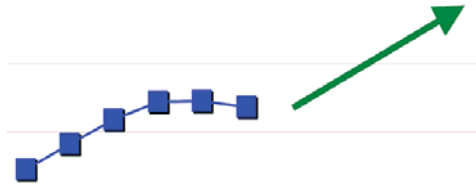
The bars to the left are topped-off with listening to stations that are not classified due to insufficient audience data.



Diver, Cruiser, or Climber?

(These stations and their exact repeaters generate two-thirds of all public radio listening)

KALW-FM	Cruiser	KVOD-FM	Diver	WHRV-FM	Climber
KBAQ-FM	Diver	KWMU-FM	Climber	WHYY-FM	Cruiser
KBPS-FM	Cruiser	KXJZ-FM	Climber	WITF-FM	Steep Diver
KCEP-FM	Diver	KXPR-FM	Cruiser	WJCT-FM	Climber
KCFR-AM	Cruiser	WABE-FM	Climber	WJSP-FM	Cruiser
KCMP-FM	Steep Climber	WAMC-FM	Diver	WKAR-FM	Cruiser
KCRW-FM	Diver	WAMU-FM	Climber	WKSU-FM	Climber
KCSM-FM	Cruiser	WBAI-FM	Steep Diver	WLRN-FM	Cruiser
KCUR-FM	Climber	WBEZ-FM	Steep Diver	WMEA-FM	Cruiser
KERA-FM	Cruiser	WBGO-FM	Steep Diver	WMFE-FM	Diver
KEXP-FM	Climber	WBHM-FM	Steep Diver	WMHT-FM	Climber
KHPR-FM	Cruiser	WBJC-FM	Cruiser	WMNF-FM	Cruiser
KJZZ-FM	Climber	WBUR-FM	Diver	WNCW-FM	Climber
KKJZ-FM	Diver	WCBE-FM	Steep Diver	WNPR-FM	Diver
KNCT-FM	Diver	WCPN-FM	Cruiser	WNYC-AM	Diver
KNOW-FM	Climber	WCVE-FM	Climber	WNYC-FM	Steep Climber
KOPB-FM	Steep Climber	WDAV-FM	Climber	WOSU-FM	Diver
KPBS-FM	Cruiser	WDCB-FM	Cruiser	WPFW-FM	Steep Diver
KPCC-FM	Climber	WDET-FM	Steep Diver	WPLN-FM	Diver
KPFA-FM	Cruiser	WDUQ-FM	Cruiser	WQCS-FM	Climber
KPFK-FM	Diver	WEPR-FM	Climber	WQED-FM	Cruiser
KPFT-FM	Climber	WERN-FM	Cruiser	WRTI-FM	Diver
KPLU-FM	Diver	WETA-FM	Steep Diver	WRVO-FM	Climber
KQED-FM	Cruiser	WEVO-FM	Climber	WSHU-FM	Climber
KSJN-FM	Cruiser	WFAE-FM	Cruiser	WUNC-FM	Diver
KSTX-FM	Climber	WFCR-FM	Climber	WUOM-FM	Climber
KTSU-FM	Cruiser	WFDD-FM	Diver	WUSF-FM	Cruiser
KUER-FM	Cruiser	WFPL-FM	Diver	WUWM-FM	Diver
KUHF-FM	Climber	WFUV-FM	Steep Diver	WVPR-FM	Diver
KUNC-FM	Cruiser	WFYI-FM	Cruiser	WVTF-FM	Cruiser
KUNM-FM	Climber	WGBH-FM	Diver	WVXU-FM	Climber
KUOW-FM	Cruiser	WGCU-FM	Cruiser	WWFM-FM	Cruiser
KUSC-FM	Diver	WGUC-FM	Diver	WXEL-FM	Cruiser
KUT -FM	Climber	WHA -AM	Climber	WXPB-FM	Cruiser
KUVO-FM	Cruiser	WHRO-FM	Cruiser	WYPR-FM	Climber



Setting Course

Where are public radio's pilots taking its stations?

The table on the previous page shows the trajectories of stations that, with their exact repeaters, comprise over two-thirds of all listening to public radio.

What vector is your station on? The odds

are seven in ten it's not a Climber.

The graphs that follow (pages 8-13) track the progress of Divers, Cruisers, and Climbers over the last decade.

But the story they tell isn't about national aggregates or someone else's problems. It's about setting one's own course, accepting responsibility, and taking corrective action.

SIDEBAR

Trajectories & Programming Emphasis

We regressed listener-hours over time to determine the direction of flight over two time periods – Spring 2002 through Fall 2005 (extended vector) and Spring 2004 through Fall 2005 (recent vector).

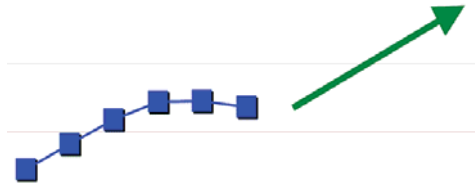
If both vectors were negative and listening in calendar 2005 was less than in 2002, we assigned the station to the **Diver** cohort. If both vectors were positive and listening in calendar 2005 was greater than in 2002, we assigned the station to the **Climber** cohort. All other stations are **Cruisers**.

We also created a simple description of programming emphasis with which to explore audience dynamics.

Music stations generate at least 75 percent of their listening with music programming. **N-I-E stations** generate at least 75 percent of their listening with news, information, and entertainment shows. **Mixed-Format stations** remain.

We tracked listening by source of programming (local or network) and broad format (music or N-I-E). Refer to the previous report for more about **local music**, **network music**, **network N-I-E**, and **local N-I-E**.

Listening to virtually all public stations is characterized and included in this report's graphs. In its tables (pages 6, 18, and 20-22) only stations generating two-thirds of the national audience are shown.

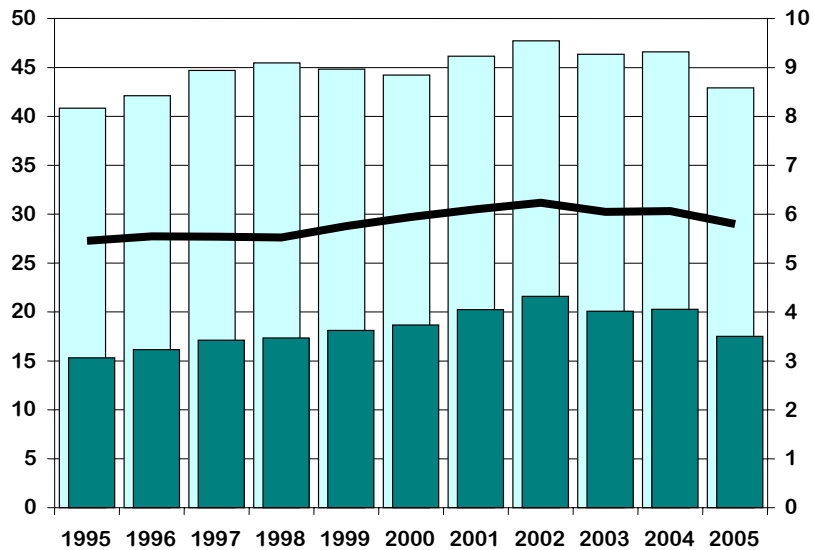


Graph 3

Divers are at the root of public radio's historic loss of audience momentum. Their loyalty never hit the highs reached by other cohorts, and it has been in decline for several years (as have cumes, not shown).

The line shows the loyalty to Divers (scaled on the left axis). The bars show listening to Diver stations (front) and other stations (back) by Divers' weekly cume (scaled on the right axis, in billions of listener-hours per year).

Loyalty & Listening to Divers
Public Radio's Arbitron Diary Database

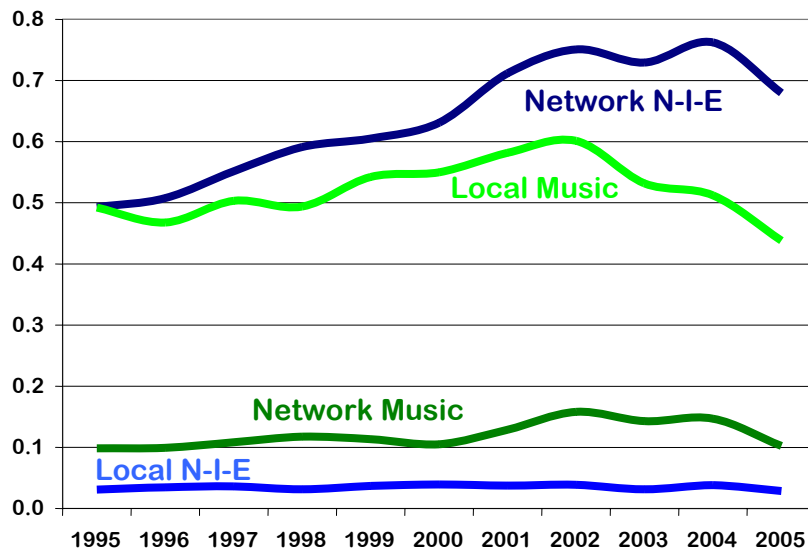


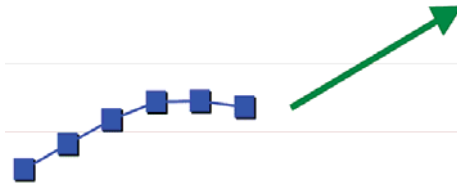
Graph 4

Many Mixed-Format Divers are displacing local music with programming that yields a net loss in listening. Others are simply losing their music listeners.

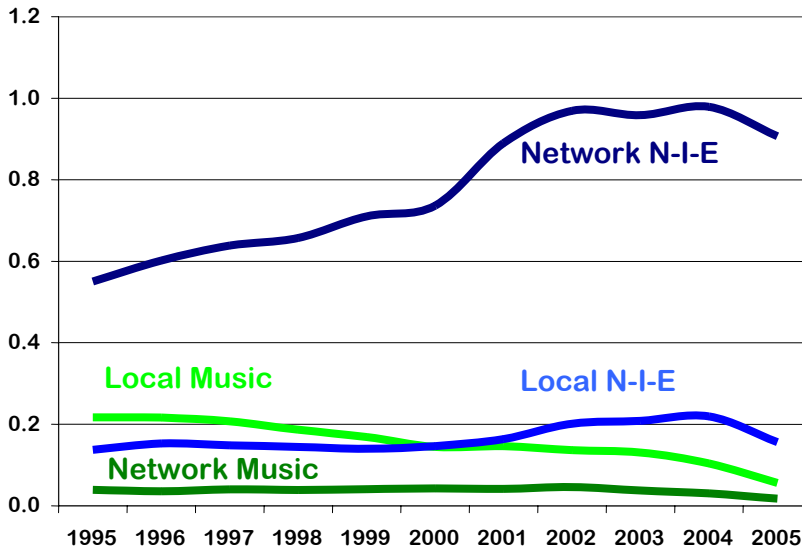
Whatever the problems may be, they are affecting listening to everything.

Listening to Mixed-Format Divers
(Listener-Hours per Year, in Billions)
Public Radio's Arbitron Diary Database





Listening to N-I-E Divers
 (Listener-Hours per Year, in Billions)
 Public Radio's Arbitron Diary Database



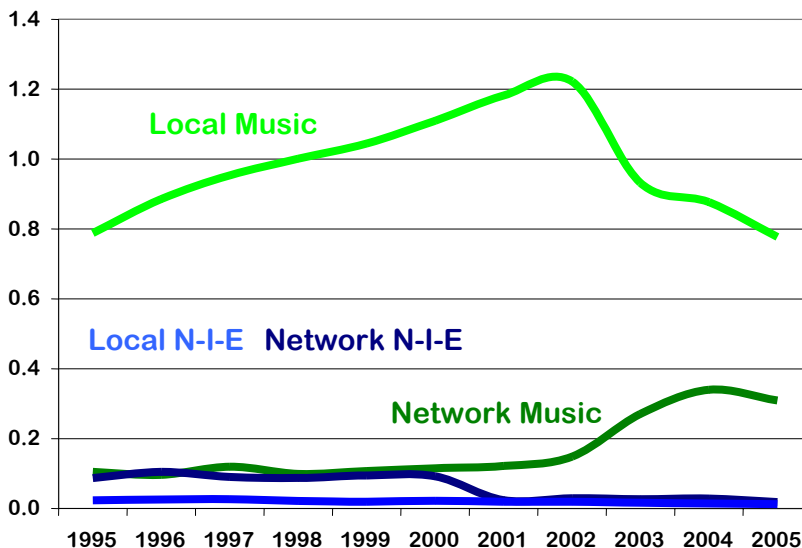
Graph 5

N-I-E Divers have been jettisoning the remnants of local music for years.

The large audience up-drafts of 2001 and 2002 held them aloft through 2004 but disappeared last year.

Whatever the challenges may be, they are affecting listening to everything.

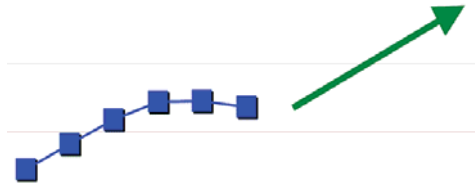
Listening to Music Divers
 (Listener-Hours per Year, in Billions)
 Public Radio's Arbitron Diary Database



Graph 6

Music Divers were climbing nicely through 2002. Then the wind left their sails. Network music has taken up some but not all of the slack.

As with the other two types of Divers, recent audience loss is evident across all types of programming.

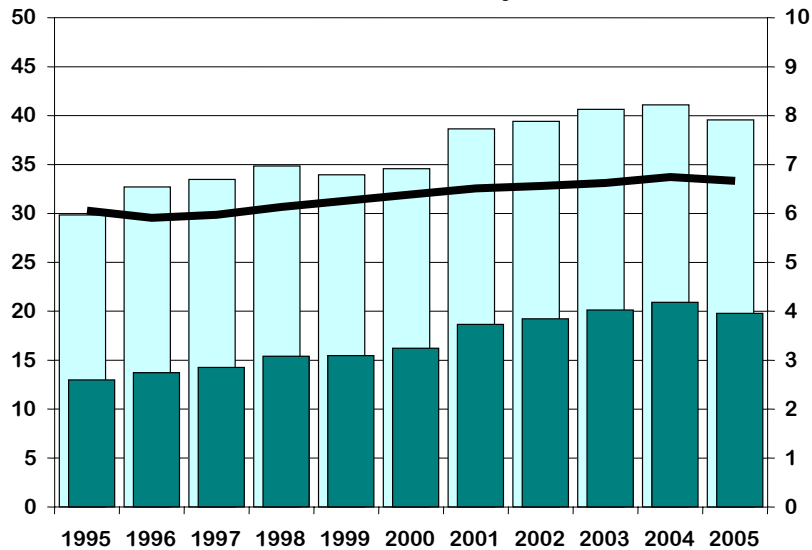


Graph 7

Listening to Cruisers was actually increasing until last year; they were shallow Climbers in a way. But as Graphs 8-10 show, audience dynamics vary significantly by Cruiser type.

The line shows the loyalty to Cruisers (scaled on the left axis). The bars show listening to Cruiser stations (front) and other stations (back) by Cruisers' weekly cume (scaled on the right axis, in billions of listener-hours per year).

Loyalty & Listening to Cruisers
Public Radio's Arbitron Diary Database

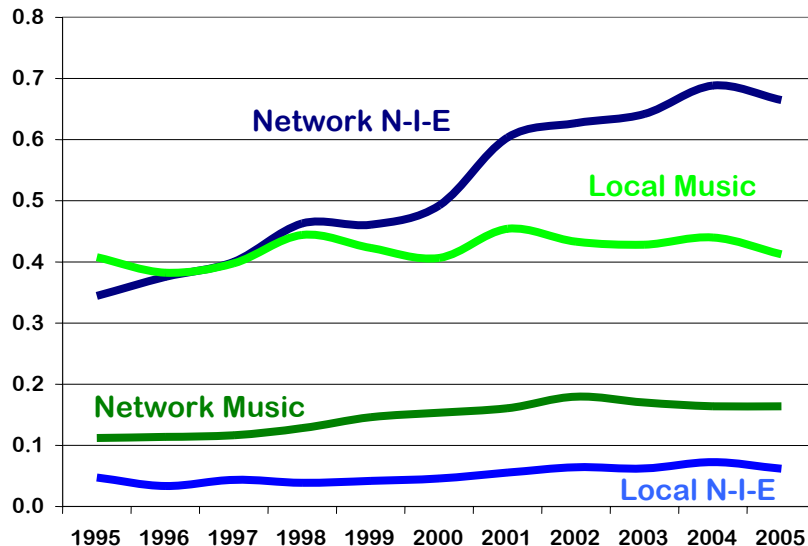


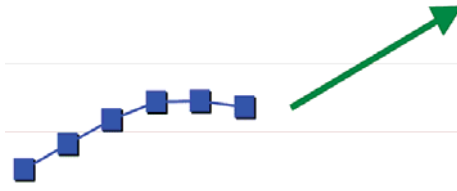
Graph 8

Network news, information, and entertainment propelled audience growth among Mixed-Format Cruisers between 2000 and 2004.

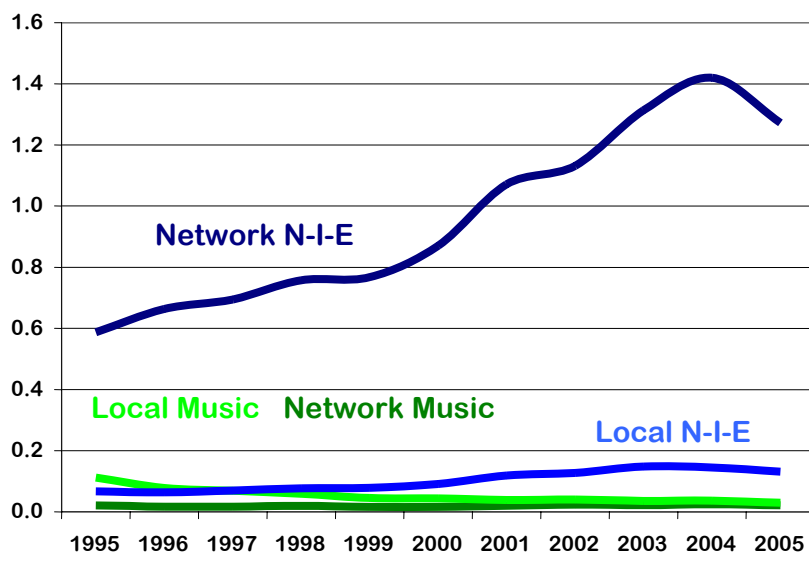
Trajectories changed in 2005 and separated these stations from the Mixed-Format Climbers.

Listening to Mixed-Format Cruisers
(Listener-Hours per Year, in Billions)
Public Radio's Arbitron Diary Database





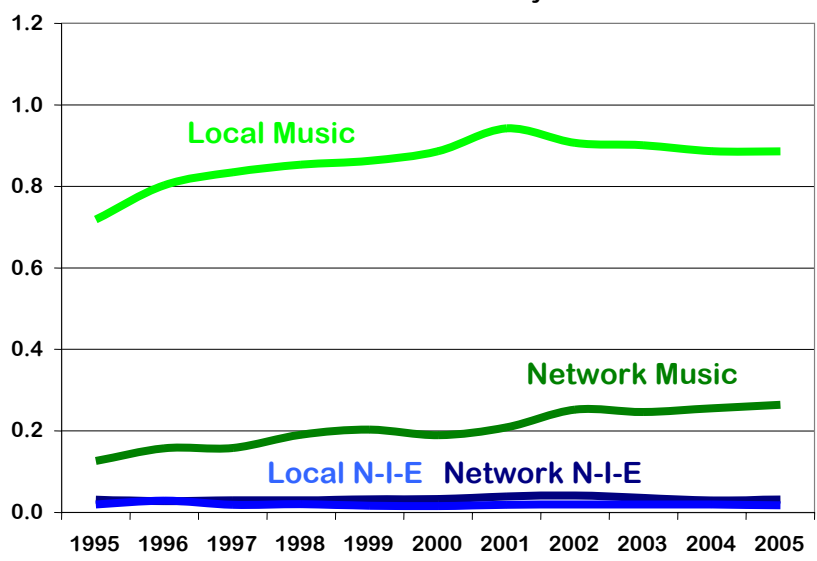
Listening to N-I-E Cruisers
 (Listener-Hours per Year, in Billions)
 Public Radio's Arbitron Diary Database



Graph 9

Declines in network news, information, and entertainment listening turned these Climbers into Cruisers in 2005. Listening to their local N-I-E has been flat or in decline since 2003.

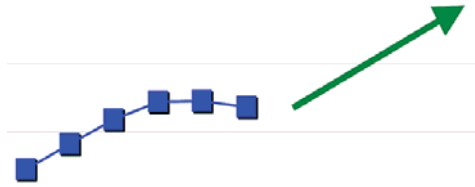
Listening to Music Cruisers
 (Listener-Hours per Year, in Billions)
 Public Radio's Arbitron Diary Database



Graph 10

Music Cruisers are the only Cruisers that were not until recently Climbers.

The last few years have seen a slight shift away from local toward network music. But local music is still the soundtrack for Music Cruisers.

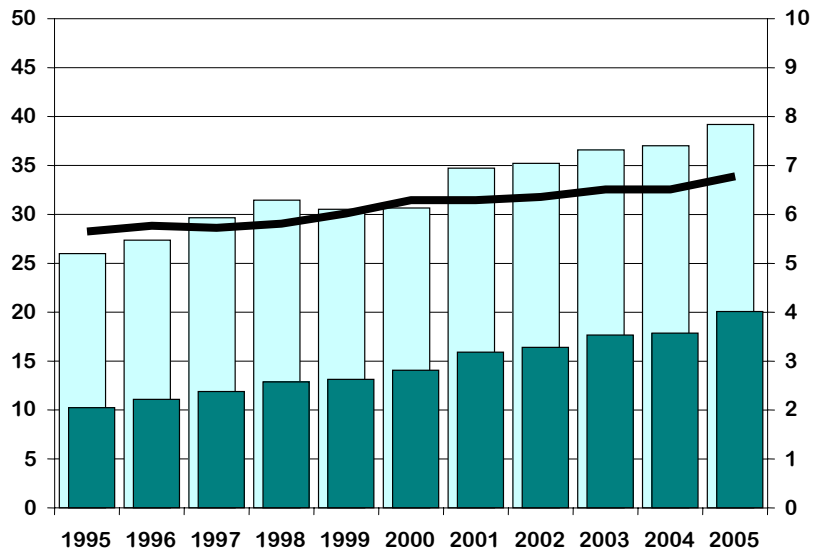


Graph 11

Climbers comprise the only cohort of stations to increase its loyalty and its listening in 2005.

The line shows the loyalty to Climbers (scaled on the left axis). The bars show listening to Climber stations (front) and other stations (back) by Climbers' weekly cume (scaled on the right axis, in billions of listener-hours per year).

Loyalty & Listening to Climbers
Public Radio's Arbitron Diary Database

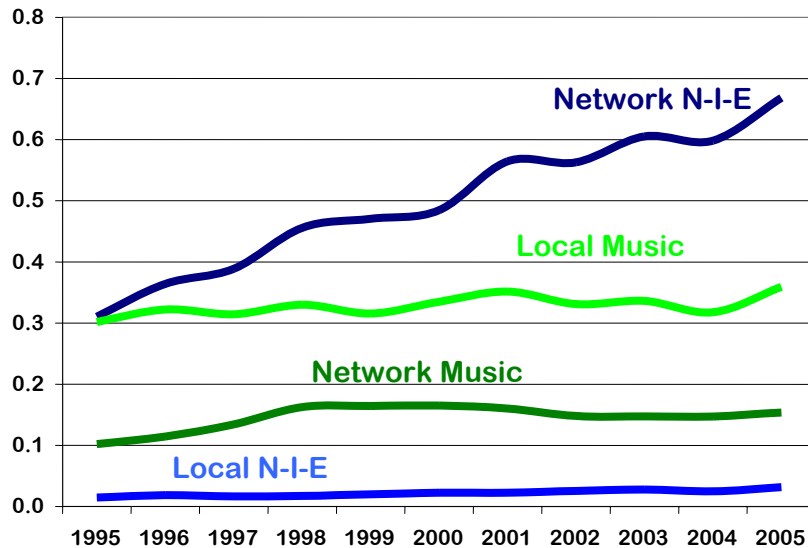


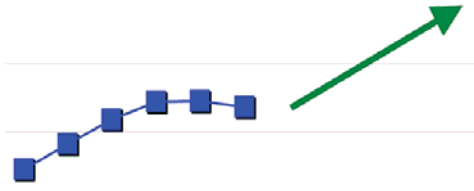
Graph 12

Network N-I-E has been the engine driving the ascent of Mixed-Format Climbers, as it has been among the other Mixed-Format cohorts.

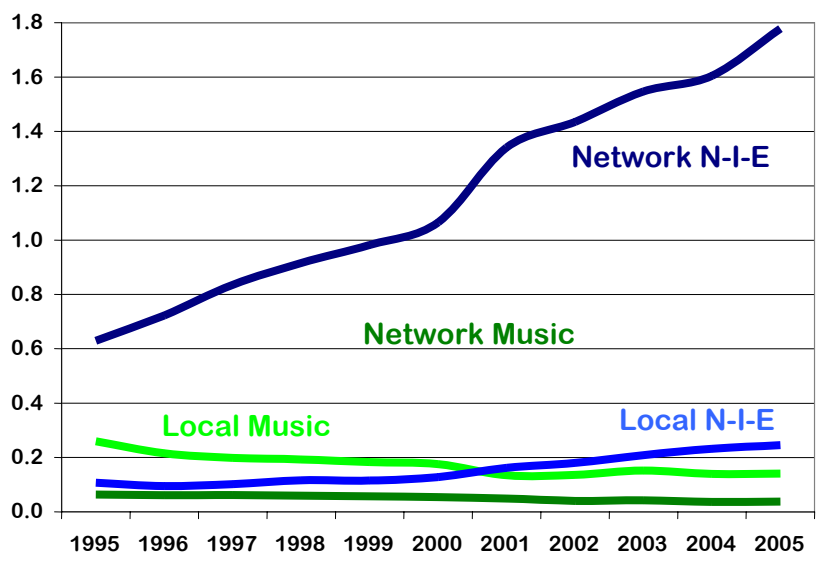
Climbers, however, were markedly able to maintain and raise listening across all formats in 2005 – unlike any other cohort.

Listening to Mixed-Format Climbers
(Listener-Hours per Year, in Billions)
Public Radio's Arbitron Diary Database





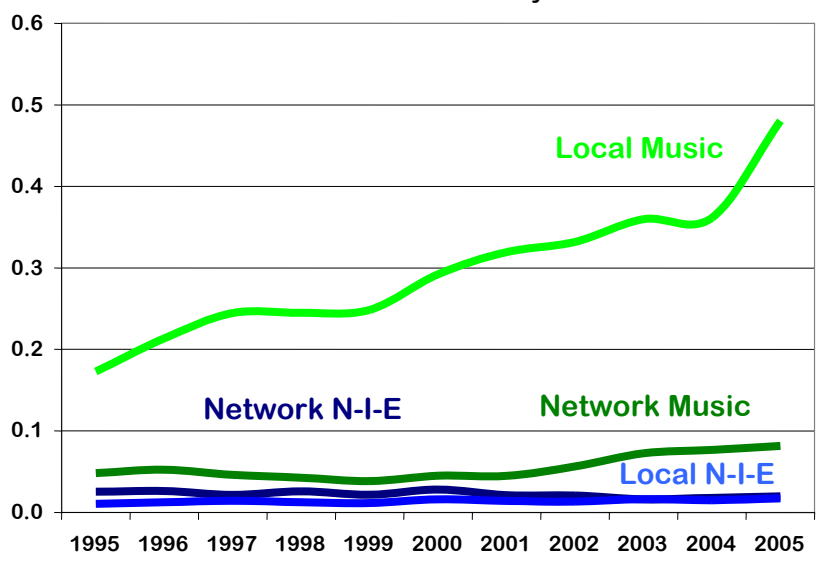
Listening to N-I-E Climbers
 (Listener-Hours per Year, in Billions)
 Public Radio's Arbitron Diary Database



Graph 13

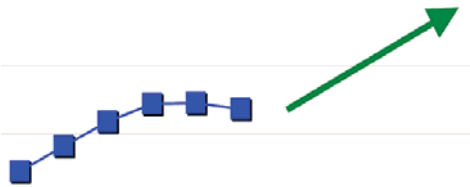
While dumping the last remnants of music, N-I-E Climbers have been building audiences consistently to both network and local programming for a decade.

Listening to Music Climbers
 (Listener-Hours per Year, in Billions)
 Public Radio's Arbitron Diary Database



Graph 14

Music Climbers are the most local of the cohorts. They resumed their upward trajectory after a bit of a stall in 2004.



Graphs 15 & 16

Divers are Divers because they haven't maintained loyalty in the 21st century.

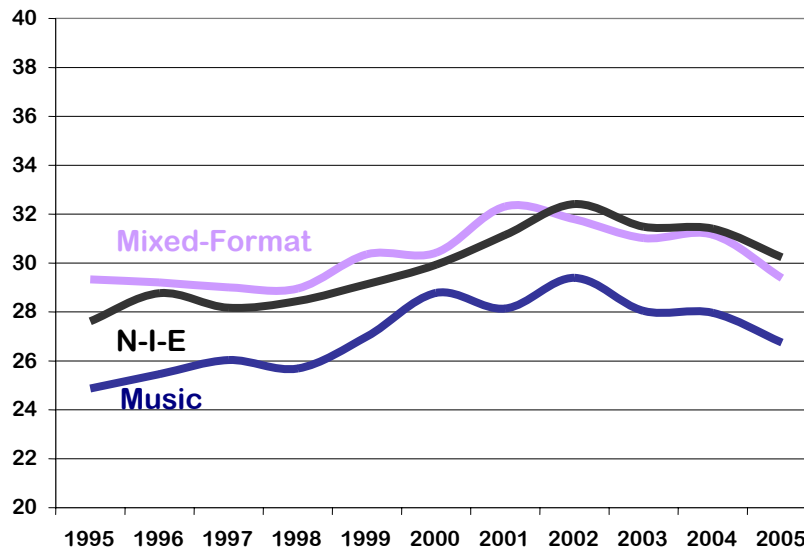
Climbers are Climbers because they have.

Declining loyalty puts a station into a downward spin. By definition, it means the station is not as capable of serving its own cume as it once was.

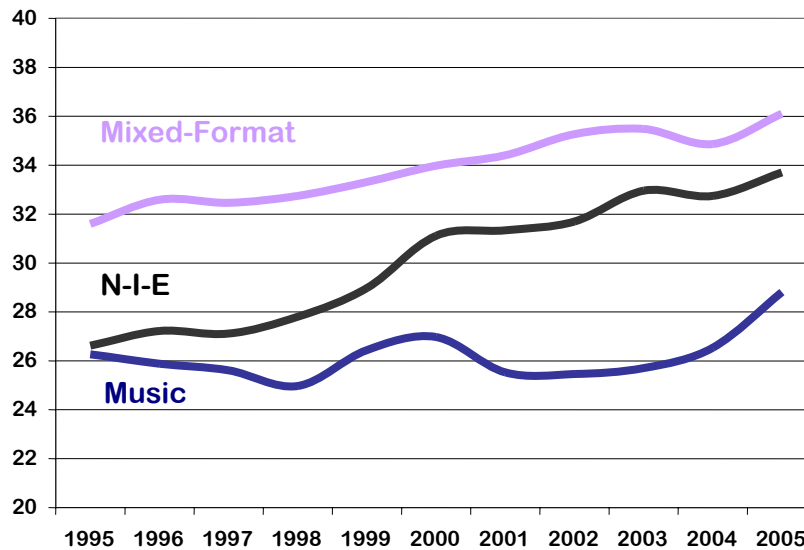
People listen less often. Indeed, infrequent listeners may tune in less than once per week and thereby leave the weekly cume.

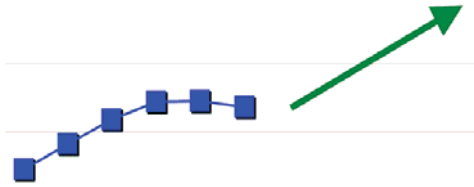
Less listening begets less listener sensitive revenue. Divers will have less money next year than this year or last – and less of an ability to pull themselves out of the dive.

Loyalty to Divers
Public Radio's Arbitron Diary Database



Loyalty to Climbers
Public Radio's Arbitron Diary Database





SIDEBAR

The 9/11 Myth

This myth goes like this. Audiences spiked in 2001 and 2002 as Americans turned to public radio to make sense of 9/11. As memories of 9/11 fade, listening levels and growth rates return to normal, thereby explaining the loss of momentum.

The solid lines in Graph 17 track listening to Divers. **Steep Divers** have lost the most listening. Their audience spike is certainly evident in 2001 and 2002. But as one-third of all Steep Divers are music stations, this spike can't all be due to 9/11.

“Normal” listening levels are established by rates of growth through 2000 and indicated

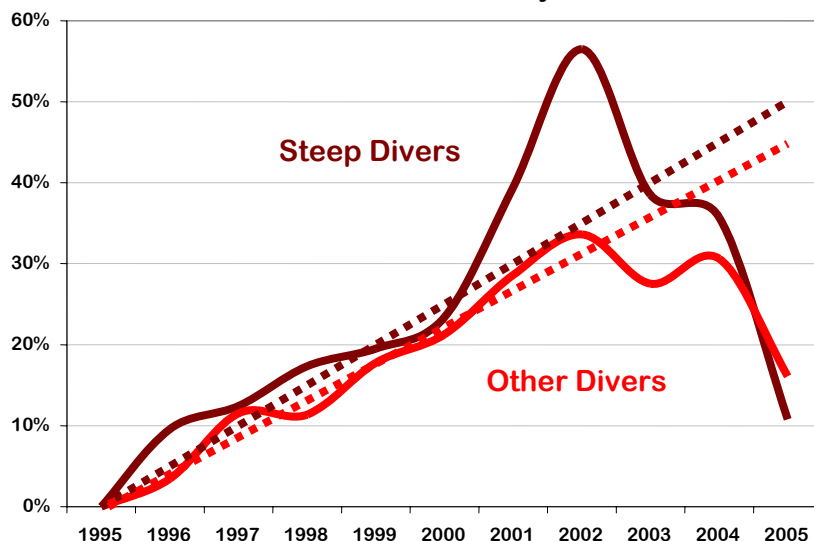
by the dotted lines. **Steep Divers** have *not* returned to normal. They have plunged right through their previous trajectory, and have descended to levels not seen since 1996.

Other Divers did *not* experience the listening impact attributed to 9/11. They did not have the benefit of the spike – whatever its cause. And subsequently, they too have plunged to 20th century listening levels.

9/11 may have contributed to a rapid rise in listening at some stations, but it alone does not account for its rapid fall.

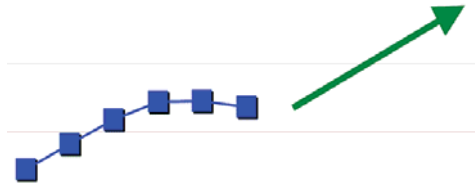
Myth busted.

Change in Listening to Divers
(Growth or Decline Since 1995)
Public Radio's Arbitron Diary Database



Graph 17

Solid lines show listening levels compared to 1995. Dotted lines suggest what listening should be per pre-9/11 audience growth.



SIDEBAR

A Millimeter of Loyalty Equals a Ton of Service and a Bucket of Support

Loyalty is highly leveraged; a little bit translates into a whole lot of listening and money.

Although it can be any number between zero and 100, loyalty to most public stations ranges between 25 and 45. A one-point move in this narrow band, up or down, translates into a lot of listening.

Between 1995 and 2002, only a point or two of loyalty separated Divers and Climbers. Yet as Graph 1 shows, Climbers were growing much faster during this time. That's the difference a point or two of loyalty makes.

Loyalty to Climbers and Divers diverged after 2002. This divergence is in fact what sets them apart. Had all Divers maintained their loyalty, they'd have generated an additional 1,400,000,000 listener-hours of service across the years 2002 through 2005.

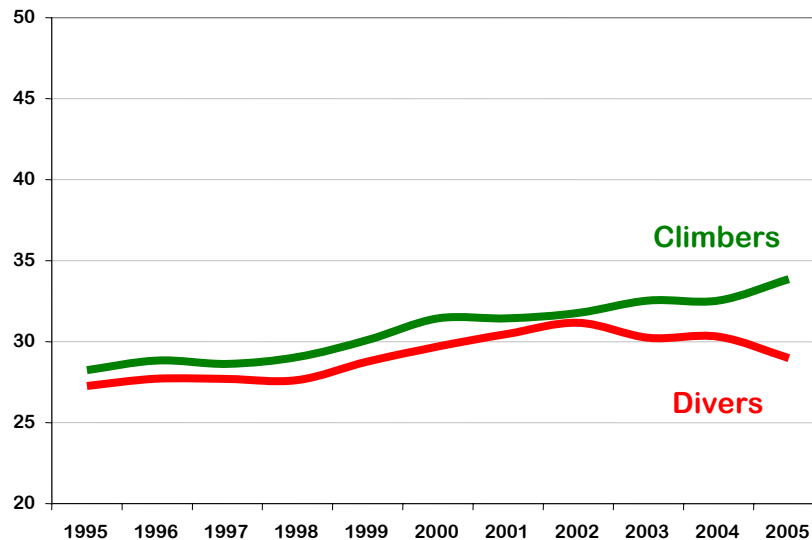
An industry-average *net* of 2.5 cents per listener-hour from listener-sensitive support translates into \$35 million in lost revenue. Again, that's *net, after expenses*.

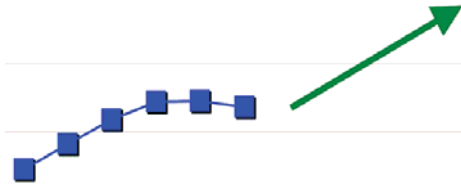
The next two pages detail what could have been and what still might be for Divers.

Graph 18

Loyalty to Climbers & Divers
Public Radio's Arbitron Diary Database

Loyalty differences between Divers and Climbers seem small. However, had Divers simply maintained their loyalty rather than allowed it to decline, they'd be generating at least 10 percent more listening today, and we wouldn't be writing about public radio's historic loss of audience momentum and pending loss of revenue.





SIDEBAR

What Might Have Been And What Might Be

The table on the following page looks backward at the costs suffered by Divers, and looks forward to the benefits of pulling out of their dives.

The left part of the table shows the cost of diving in **public service terms** (annual listener-hours) and **financial terms** (net listener-sensitive revenues).

Between 2002 and 2005, listening to the 34 stations on the table (and their exact repeaters) declined one-quarter of a billion annual listener-hours. In 2005 alone, they earned \$5.5 million less in net listener-sensitive revenue than they would have had they maintained their listening at 2002 levels.

Looking forward, AudiGraphics' metric of **opportunity** estimates the public service and financial returns to be reaped from pulling out of the dives.

Opportunity is the increase in listening that would result if a station were to raise the loyalty of all programming to the loyalty of its programming that is now above average.

The right part of the table shows this opportunity in public service terms (annual listener-hours) and in financial terms (net listener-sensitive revenues).

Were the 34 stations on this table to claim the opportunity that awaits them, they'd regain 200 million of the 250 million annual

listener-hours lost since 2002. This translates into \$4.5 million in additional net revenue by year's end via individual giving and fundraising.

No, it doesn't return them to 2002's levels of service. Not in the first year. But it certainly sets their compasses in the right direction.

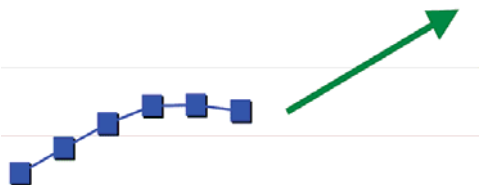
Keep in mind that these numbers are estimates; each station's net returns per listener-hour will vary from the national average of 2.5¢. But they are not wildly off, and they give us a good idea of the impact of diving in both service and cents.

We calculated the public service lost by subtracting each station's listening in calendar 2005 from its listening in calendar 2002.

To estimate lost revenues, we multiplied this lost listening by 2.5¢ – the industry's average net revenue per listener-hour in fiscal 2004 for listener-sensitive sources (individual giving and underwriting).

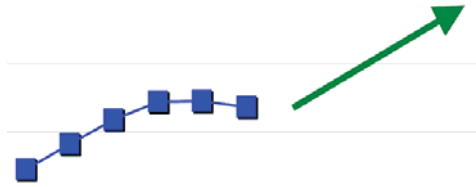
We estimated listener-hours to be gained in 2006 by applying AudiGraphics' Fall 2005 opportunity estimates to calendar year 2005 listening.

We multiplied this added listening by 2.5¢ to estimate each station's expected increase in net revenues.



Service & Cents, Lost & Found, Among Public Radio's Largest Divers

Station	Looking Backward: Lost in 2005 (Compared to 2002)		Looking Forward: Opportunity in 2006 (Compared to 2005)	
	Annual Listener-Hours (millions)	Net Listener-Sensitive Revenues	Annual Listener-Hours (millions)	Net Listener-Sensitive Revenues
KBAQ-FM	-5.1	-\$115,000	3.3	\$75,000
KCEP-FM	-11.2	-\$252,000	6.2	\$140,000
KCRW-FM	-5.1	-\$115,000	6.9	\$154,000
KKJZ-FM	-8.4	-\$189,000	8.5	\$191,000
KNCT-FM	-0.1	-\$1,000	1.7	\$39,000
KPFK-FM	-3.3	-\$74,000	5.4	\$123,000
KPLU-FM	-7.1	-\$159,000	10.4	\$235,000
KUSC-FM	-8.3	-\$186,000	8.1	\$182,000
KVOD-FM	-8.8	-\$197,000	3.7	\$83,000
WAMC-FM	-0.2	-\$5,000	4.8	\$108,000
WBAI-FM	-24.3	-\$546,000	4.4	\$99,000
WBEZ-FM	-14.3	-\$321,000	11.6	\$261,000
WBGO-FM	-12.3	-\$277,000	14.7	\$331,000
WBHM-FM	-8.9	-\$201,000	2.1	\$47,000
WBUR-FM	-10.4	-\$234,000	7.9	\$178,000
WCBE-FM	-7.1	-\$159,000	3.2	\$72,000
WDET-FM	-9.4	-\$211,000	6.1	\$138,000
WETA-FM	-15.5	-\$349,000	8.8	\$198,000
WFDD-FM	-1.7	-\$39,000	3.0	\$68,000
WFPL-FM	-2.8	-\$62,000	1.9	\$44,000
WFUV-FM	-8.3	-\$187,000	7.3	\$165,000
WGBH-FM	-2.6	-\$57,000	7.7	\$173,000
WGUC-FM	-8.5	-\$191,000	1.6	\$37,000
WITF-FM	-8.9	-\$200,000	2.7	\$62,000
WMFE-FM	-3.6	-\$80,000	5.1	\$114,000
WNPR-FM	-2.4	-\$55,000	4.7	\$106,000
WNYC-AM	-15.2	-\$341,000	10.8	\$244,000
WOSU-FM	-3.1	-\$70,000	1.9	\$42,000
WPFW-FM	-6.3	-\$142,000	14.2	\$321,000
WPLN-FM	-3.4	-\$77,000	3.6	\$81,000
WRTI-FM	-16.7	-\$377,000	6.0	\$136,000
WUNC-FM	-0.7	-\$15,000	5.4	\$121,000
WUWM-FM	-1.2	-\$26,000	3.6	\$81,000
WVPR-FM	-3.3	-\$74,000	4.1	\$92,000
TOTALS	-248.1	-\$5,584,000	201.8	\$4,541,000



Situational Awareness

We don't know what actually *caused* the loss of listening and loyalty among Divers. But we do know it is not associated with a single type of programming.

Graphs 3 through 14 clearly show network N-I-E, local N-I-E, local music, and network music diving among Divers. They show the same range of programming climbing among Climbers.

If the type and source of programming isn't to blame, then execution must be.

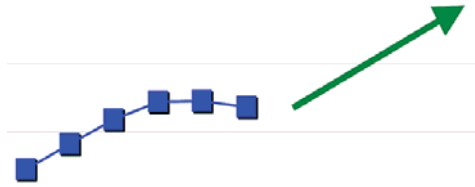
Are all program elements working together for a consistent audience?

Are all program elements as powerful as possible at all times for that audience?

In short, is the station providing radio that's good enough to hold its listeners?

The tables on the next three pages show the programming emphases and listener loyalty to individual stations.

Pilots should maintain situational awareness at all times.



Divers

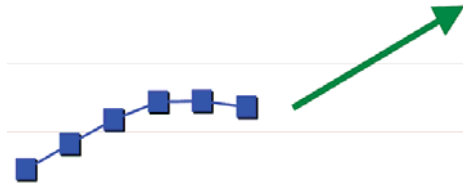
Programming Emphasis and Loyalty as of Calendar Year 2005

(Stations at the top are among the top-third in public radio)

(Stations at the bottom are among the middle-third in public radio)

(Stations in **bold** are Steep Divers)

Station	Programming Emphasis					Loyalty			
	Type of Emphasis	Network N-I-E	Local N-I-E	Local Music	Network Music	Network N-I-E	Local N-I-E	Local Music	Network Music
KCRW-FM	Mixed	63%	4%	33%	*	31	29	28	*
KPLU-FM	Mixed	53%		45%	2%	37		29	28
KUSC-FM	Music			17%	83%			29	25
WBEZ-FM	N-I-E	81%	11%	7%	1%	36	28	20	27
WBGO-FM	Music	2%	*	93%	5%	24	*	22	22
WBUR-FM	N-I-E	99%	*	*		39	*	*	
WETA-FM	N-I-E	79%		17%	5%	25		21	20
WNYC-AM	N-I-E	75%	24%	1%		26	31	29	
WRTI-FM	Music	*	*	92%	8%	*	*	32	32
KBAQ-FM	Music	1%		82%	17%	42		38	40
KCEP-FM	Music	5%	4%	90%		26	22	26	
KKJZ-FM	Music			95%	5%			24	35
KNCT-FM	Music	2%		93%	5%	48		49	46
KPFK-FM	N-I-E	20%	56%	24%		39	23	20	
KVOD-FM	Music			2%	98%			37	32
WAMC-FM	N-I-E	62%	31%	3%	4%	39	33	26	33
WBAI-FM	N-I-E	21%	63%	16%		28	16	15	
WBHM-FM	Mixed	64%	*	1%	35%	42	*	36	31
WCBE-FM	Mixed	70%		24%	7%	36		19	30
WDET-FM	Mixed	37%		63%	1%	33		31	27
WFDD-FM	N-I-E	75%	2%	8%	15%	40	27	31	33
WFPL-FM	N-I-E	93%	7%			41	32		
WFUV-FM	Music	4%	2%	90%	3%	21	14	23	13
WGBH-FM	Mixed	45%		50%	5%	29		22	22
WGUC-FM	Music	17%		60%	24%	39		31	37
WITF-FM	Mixed	57%		32%	11%	40		29	35
WMFE-FM	Mixed	57%	1%	24%	18%	42	30	34	34
WNPR-FM	Mixed	56%	6%	22%	15%	36	31	25	32
WOSU-FM	Music		*	38%	62%		*	31	38
WPFW-FM	Mixed	14%	14%	71%		21	14	20	
WPLN-FM	Mixed	65%		24%	10%	45		28	39
WUNC-FM	N-I-E	97%		2%	*	40		28	*
WUWM-FM	N-I-E	89%	6%	3%	3%	37	30	24	24
WVPR-FM	Mixed	62%	1%	23%	14%	48	43	32	35



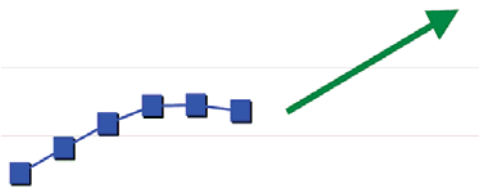
Cruisers

Programming Emphasis and Loyalty as of Calendar Year 2005

(Stations at the top are among the top-third in public radio)

(Stations at the bottom are among the middle-third in public radio)

Station	Programming Emphasis				Loyalty				
	Type of Emphasis	Network N-I-E	Local N-I-E	Local Music	Network Music	Network N-I-E	Local N-I-E	Local Music	Network Music
KERA-FM	N-I-E	89%	9%	1%		36	32	26	
KQED-FM	N-I-E	88%	12%			38	34		
KSJN-FM	Music	7%		34%	59%	34		33	36
KUOW-FM	N-I-E	84%	15%	2%	*	40	30	37	*
WHYY-FM	N-I-E	90%	9%	*	1%	36	33	*	29
WLRN-FM	N-I-E	90%	3%	6%		39	24	22	
WUSF-FM	Mixed	47%		47%	6%	50		36	44
WXPN-FM	Music	2%	4%	63%	30%	34	30	34	36
KALW-FM	N-I-E	0.8	10%	6%	3%	23	19	18	16
KBPS-FM	Music		1%	69%	31%		39	34	42
KCFR-AM	N-I-E	93%	6%		1%	35	25		13
KCSM-FM	Music			91%	9%			31	35
KHPR-FM	Mixed	44%	*	28%	27%	54	*	38	36
KPBS-FM	N-I-E	81%	8%	*	11%	41	32	*	34
KPFA-FM	Mixed	22%	46%	32%		33	26	21	
KTSU-FM	Music	5%	3%	91%	1%	16	14	19	8
KUER-FM	N-I-E	86%	6%	5%	2%	40	32	28	25
KUNC-FM	Mixed	72%		20%	8%	43		23	32
KUVO-FM	Music	1%	1%	91%	8%	40	38	28	37
KXPR-FM	Music	2%		77%	21%	46		38	40
WBJC-FM	Music	1%		92%	6%	33		31	26
WCPN-FM	N-I-E	84%	11%	4%	1%	41	31	23	24
WDCB-FM	Music	4%	2%	91%	3%	12	8	23	16
WDUQ-FM	Mixed	61%	1%	34%	4%	37	19	28	28
WERN-FM	Mixed	43%		51%	7%	40		33	27
WFAE-FM	N-I-E	91%	7%	2%	*	38	34	36	*
WFYI-FM	N-I-E	93%	1%	4%	2%	39	33	26	25
WGCU-FM	Mixed	51%	4%		45%	46	32		38
WHRO-FM	Music	1%		86%	13%	43		42	49
WJSP-FM	Mixed	64%	1%	17%	18%	37	39	27	31
WKAR-FM	Mixed	36%		39%	25%	33		35	37
WMEA-FM	Mixed	68%	7%	17%	8%	50	45	33	34
WMNF-FM	Mixed	18%	20%	62%		36	30	25	
WQED-FM	Music	3%	1%	77%	20%	55	30	32	35
WVTF-FM	Mixed	55%	2%	39%	4%	46	33	34	43
WWFM-FM	Music	*	1%	65%	34%	*	29	32	33
WXEL-FM	Mixed	53%	4%	11%	32%	37	30	32	34



Climbers

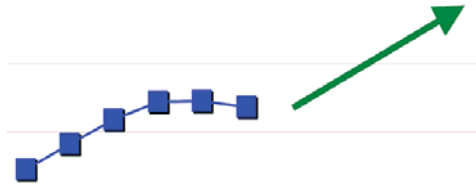
Programming Emphasis and Loyalty as of Calendar Year 2005

(Stations at the top are among the top-third in public radio)

(Stations at the bottom are among the middle-third in public radio)

(Stations in **bold** are Steep Climbers)

Station	Programming Emphasis					Loyalty			
	Type of Emphasis	Network N-I-E	Local N-I-E	Local Music	Network Music	Network N-I-E	Local N-I-E	Local Music	Network Music
KJZZ-FM	N-I-E	92%		7%	*	37		24	*
KNOW-FM	N-I-E	78%	21%	1%		38	34	31	
KOPB-FM	N-I-E	88%	3%	2%	8%	42	36	16	27
KPCC-FM	N-I-E	87%	13%			28	25		
KUHF-FM	Mixed	60%	*	30%	10%	50	*	32	33
WABE-FM	Mixed	64%		27%	9%	48		30	35
WAMU-FM	N-I-E	81%	9%	10%	*	34	27	30	*
WNYC-FM	N-I-E	59%	19%	21%	1%	32	28	23	19
WUOM-FM	N-I-E	99%	1%		*	40	36		*
KCMP-FM	Music	2%	1%	91%	6%	26	29	30	23
KCUR-FM	N-I-E	79%	10%	6%	5%	42	35	33	32
KEXP-FM	Music		2%	98%			30	34	
KPFT-FM	Mixed	22%	19%	59%		21	14	21	
KSTX-FM	N-I-E	95%	1%	1%	2%	38	27	41	36
KUNM-FM	Mixed	60%	12%	21%	7%	47	32	20	24
KUT -FM	Mixed	68%		32%	*	52		33	*
KWMU-FM	N-I-E	95%	5%	*	*	43	32	*	*
KXJZ-FM	N-I-E	83%	4%	13%	1%	35	25	25	27
WCVE-FM	Mixed	62%	*	24%	13%	57	*	38	42
WDAV-FM	Music		*	74%	25%		*	35	48
WEPR-FM	Mixed	55%	5%	2%	38%	39	27	33	31
WEVO-FM	N-I-E	91%	8%	1%	*	37	33	30	*
WFCR-FM	Mixed	56%	1%	38%	5%	41	19	28	31
WHA -AM	N-I-E	45%	52%	3%	*	34	25	40	*
WHRV-FM	N-I-E	80%	4%	14%	2%	41	32	31	27
WJCT-FM	N-I-E	93%	*	2%	5%	41	*	32	39
WKSU-FM	Mixed	60%	*	33%	7%	36	*	27	26
WMHT-FM	Music			29%	71%			33	36
WNCW-FM	Music	5%		87%	8%	31		32	38
WQCS-FM	Mixed	46%	*	6%	48%	46	*	43	37
WRVO-FM	N-I-E	90%	1%	9%		42	41	41	
WSHU-FM	Mixed	54%		30%	16%	37		26	32
WVXU-FM	N-I-E	62%	9%	24%	4%	37	21	23	35
WYPR-FM	N-I-E	82%	11%	5%	2%	38	33	20	26



Reinvigorating Public Radio

AUDIENCE 2010 set forth to identify what is causing public radio's loss of audience momentum.

What it found is that our listeners are still listening to radio and increasingly not listening to us.

Although the softening of loyalty is widespread, the loss of listening is concentrated among Divers.

The trajectories of Divers can be reversed by resetting their compasses on their listeners and updating their flight plans accordingly.

In non-metaphoric terms: **Divers need to strengthen their own listeners' loyalty.**

Indeed, strengthening loyalty is a worthy goal for all stations to adopt. Not only will it improve their public service, it will also help them compete against other stations and non-broadcast technologies.

Both macro-formatic and micro-formatic tactics can bolster listener loyalty. They are as plentiful as they are powerful.

Macro-Formatic tactics replace low loyalty, high opportunity shows with programming offering a more **powerful** (loyalty) and **appropriate** (affinity) service to the cume.

- **Loyalty graphics** guide decision-makers to the programming in greatest need of replacement.
- **Opportunity graphics** guide decision-makers to the programming which, if effectively replaced, will yield the highest returns in both service and cents.
- **Strategic Impact analyses** help managers and PDs plan for listeners' reactions to programming change.

Micro-Formatic tactics pay relentless attention to music selection and stop sets, story selection and presentation, the quality and quantity of interstitial elements.... The list of tactics is considerable, and all make better radio.

Some stations have already begun. We are already seeing signs of leveling and renewed climbing among some of the more astute Divers. Others seem to be diving yet.