CLASSICAL MUSIC RISING

State of Play

A time of radical change

- Vast social shifts

  Demography | Economy | Culture |Education

  Globalization | Urbanization | Politics
- Disruption of public institutions
- Digital ubiquity

Shared mission

Better lives

- More thoughtful, joyful, and useful
- More fulfilled in the pursuit of understanding, challenge, and personal growth
- Connect the dots in a complex world
- Beauty, refuge, inspiration . . . and laughter

Shared mission

Healthy communities

- Understand, serve, and care for the many dimensions of public life
- Encourage appreciation, participation, and support of music, art, and culture
- Nurture the sense of connection to others across barriers that often divide us

Strategic position

- Trusted content
  - Quality, depth, and authenticity
  - Integrity and fairness across all we do
- Local organizations
  - Connections, responsiveness and accountability
- Networks and collaborations
  - Power, leverage, and efficiency
- Trusted relationships with users

Service imperative

Essential journalism and dialogue

- Be the most-trusted, most-used daily journalism in America
- Address large and important issues
- Work in partnerships within and across communities
- Employ innovative and compelling approaches to gather and present information

Service imperative

Music celebration and discovery

- Curate and present music that draws from the best of earlier generations and current work
- Satisfy and inspire current music audiences and engage with an ever wider circle
- Support those who create the work we present and strengthen the music and arts ecology of our communities and the nation

Service imperative

Inclusion and diversity

Connect with a larger audience of active, curious users, reflecting a diverse and changing America – multiple generations, growing communities of color, important distinctions of geography, and diverse political and cultural views

Portfolio of channels

- Multiple channels for more service and greater diversity
- Multi-platform relationships to meet audience expectations and lifestyles
- Curated and on-demand experiences across our content
- Universal free access to core services

Sustainability and growth

Financially robust enterprises, independent of undue influence, and sufficiently resourced to pursue an ambitious agenda

- Primary support from individual gifts
- Continuing federal and state support
- Continuing sponsorship from businesses and nonprofit organizations
- Alignment public media entities for scale and efficiency

Public media's classical music

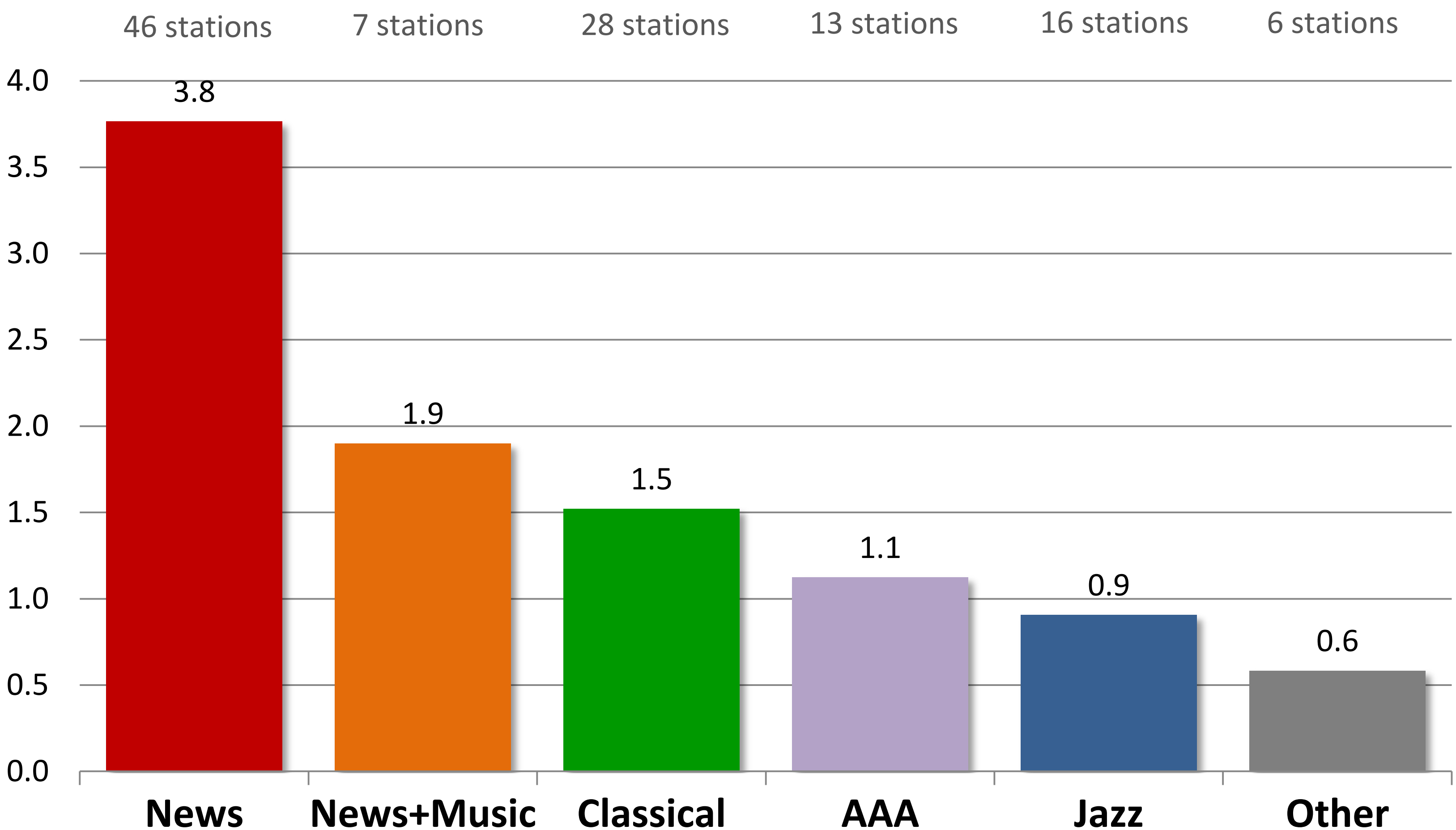
- 71 public media organizations offer an "all classical" service
  - 165 stations, 80+ streams, many translators
- 65 organizations offer news and classical mix
  - 185 stations
- Networks, distributors, and producers
  - WFMT, PRI, APM, NPR, PRX, NYPR
  - International broadcasters
  - Independent producers

Public media's classical music

- Nearly **11 million** Americans listen to public radio classical music each week
  - 6.5 million to "all classical" stations
  - 4.2 million to mixed format stations
- Around the clock, over **190,000** listeners on average are tuned to an "all classical" station

Different Station Formats: Different Shares of Listening

Average Share, Top Station in Format, Top 50 Markets, Metro Survey Fall 2016

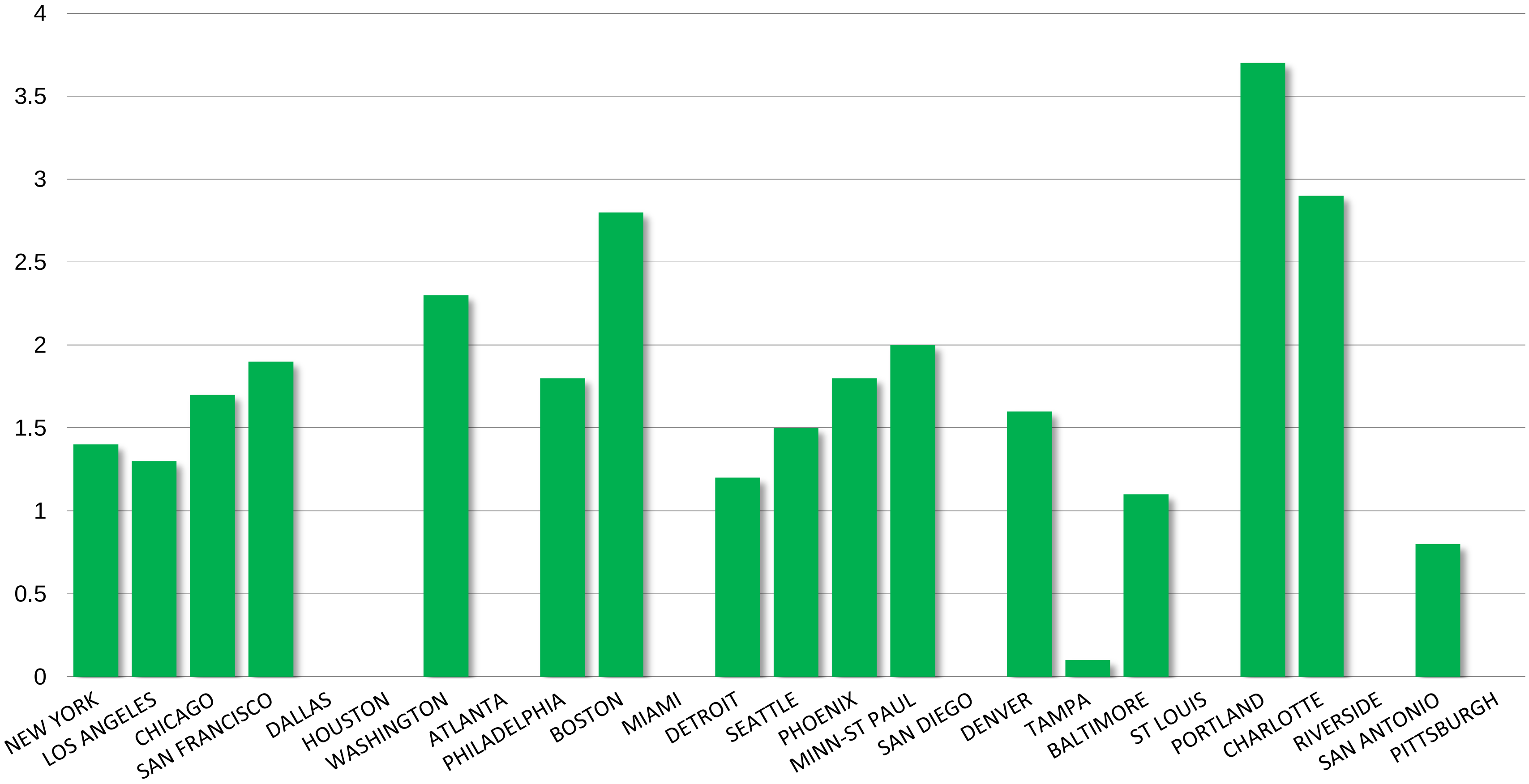


Source: Nielsen; Radio Research Consortium

Station Resource Group

Classical Stations: Top Markets

Share of Listening, Metro Survey Area, Fall 2016

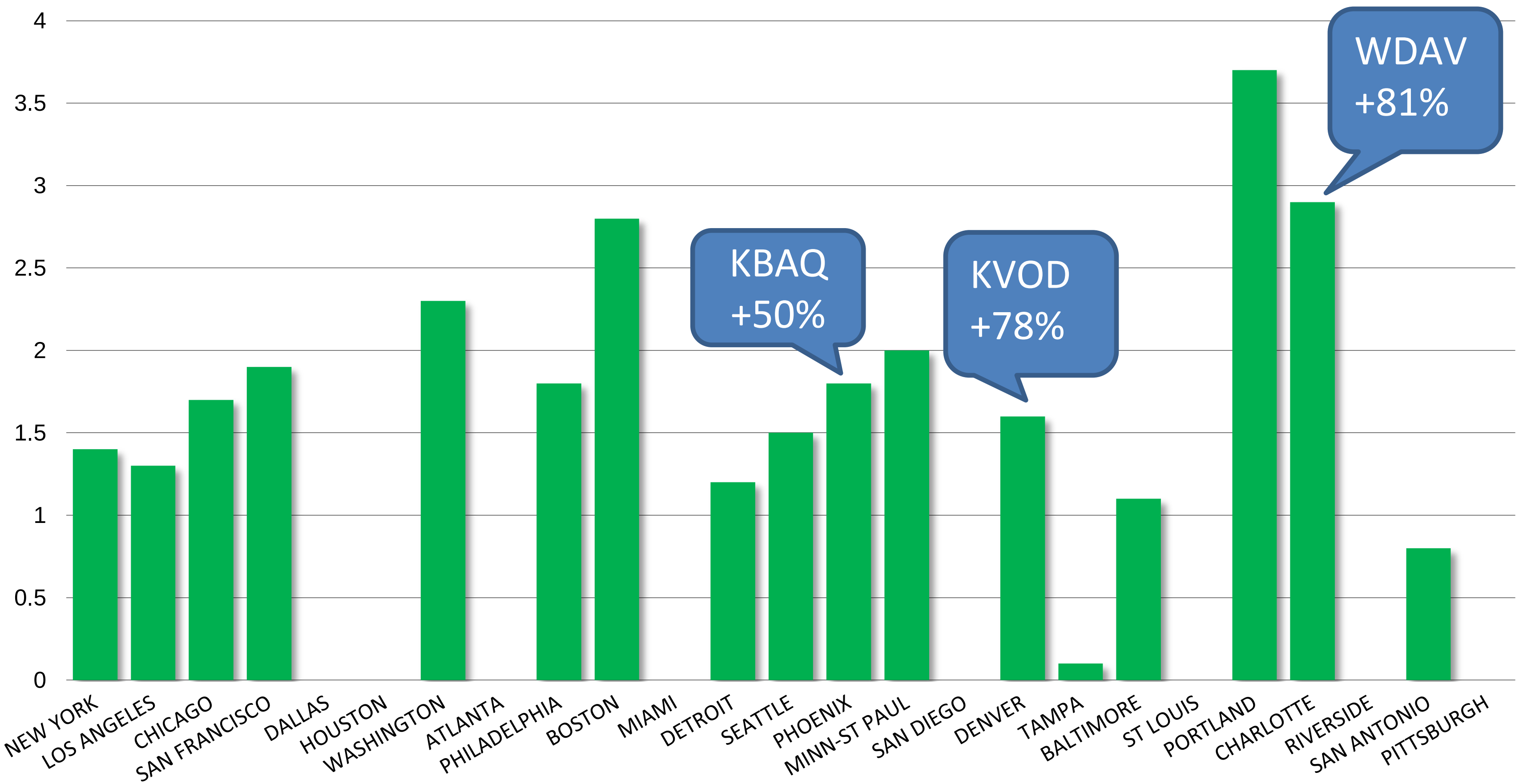


Source: Nielsen; Radio Research Consortium

Station Resource Group

Classical Stations: Top Markets

Share of Listening, Metro Survey Area, Fall 2016

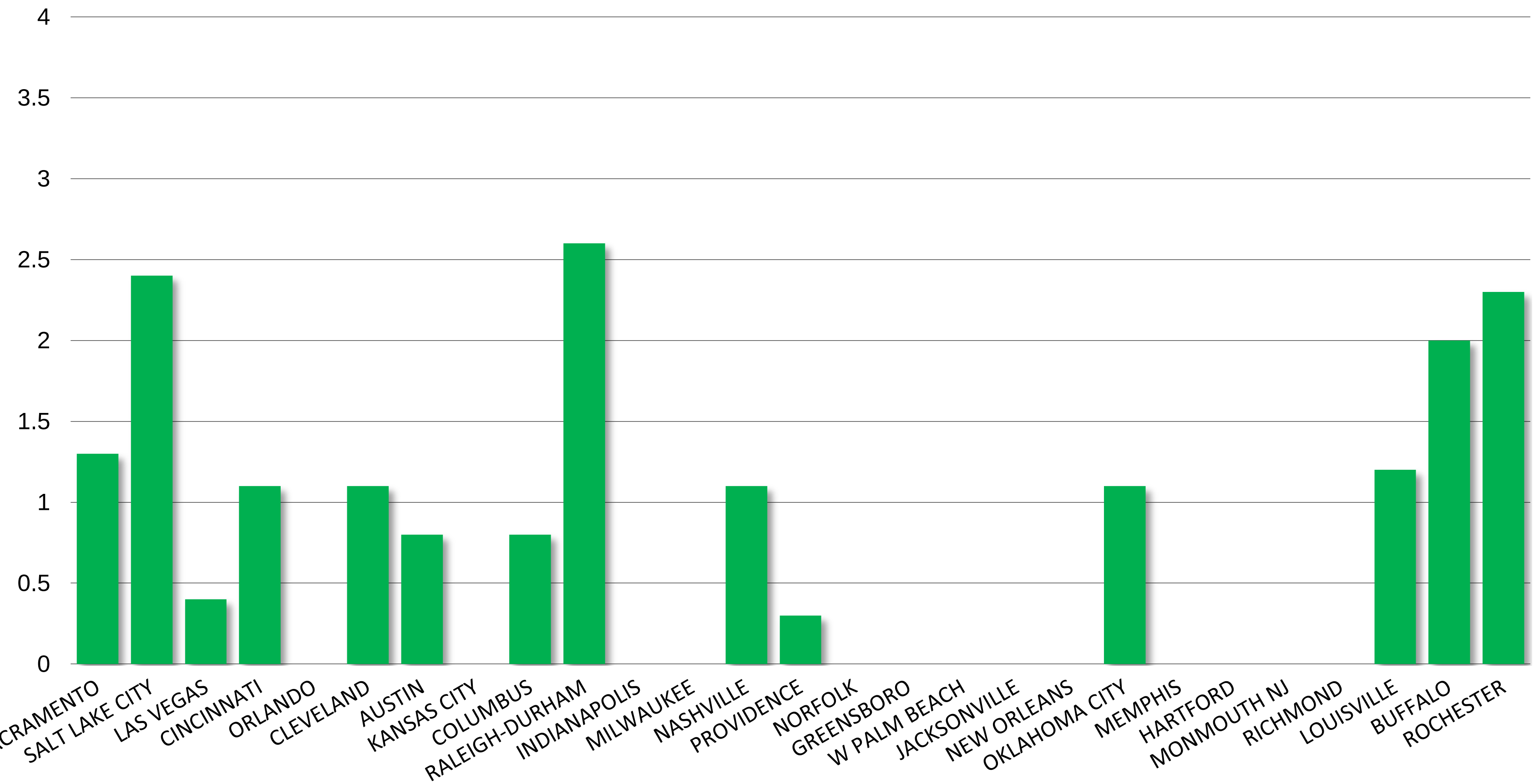


Source: Nielsen; Radio Research Consortium

Station Resource Group

Classical Stations: Markets 26-50

Share of Listening, Metro Survey Area, Fall 2016

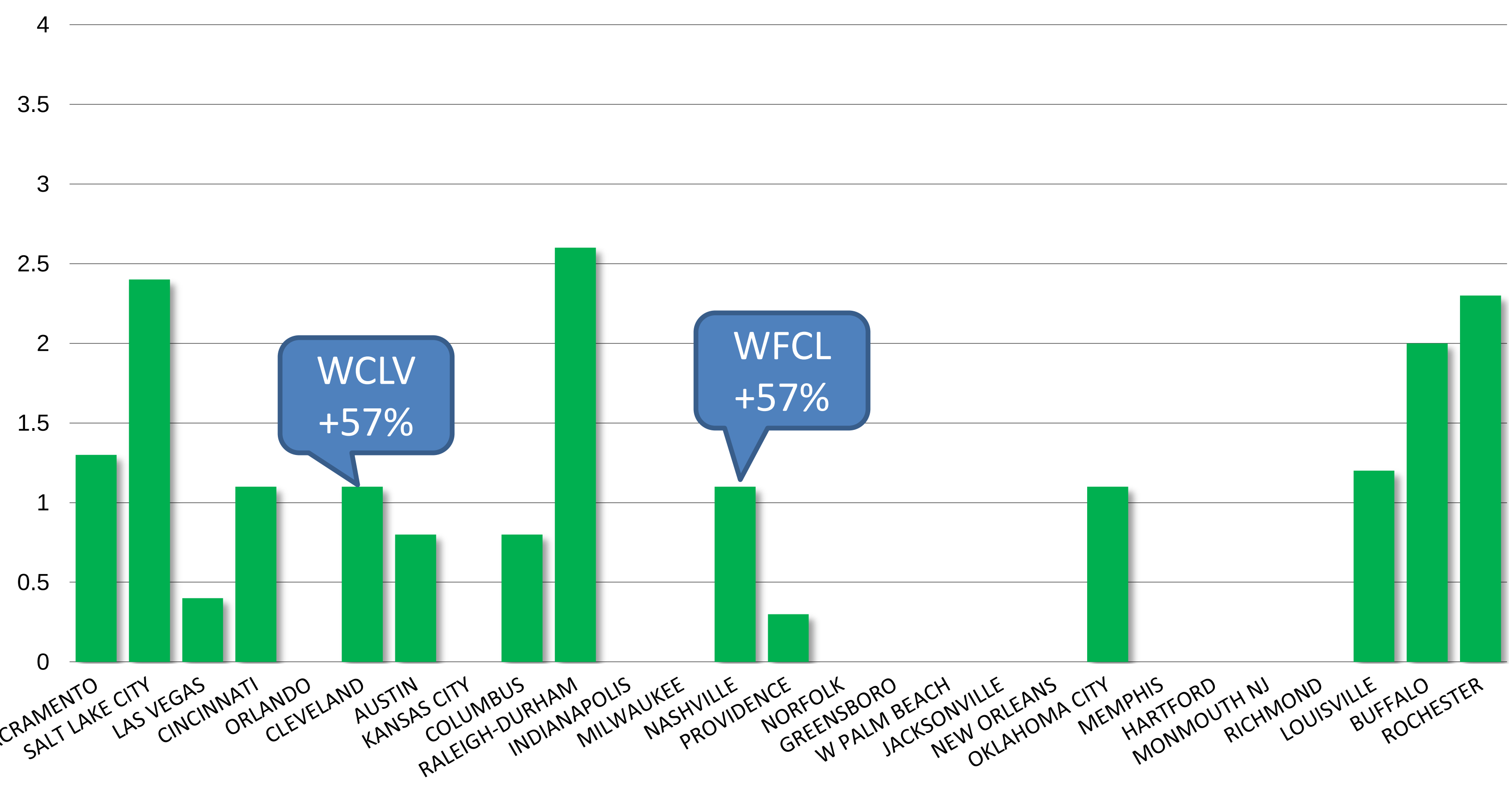


Source: Nielsen; Radio Research Consortium

Station Resource Group

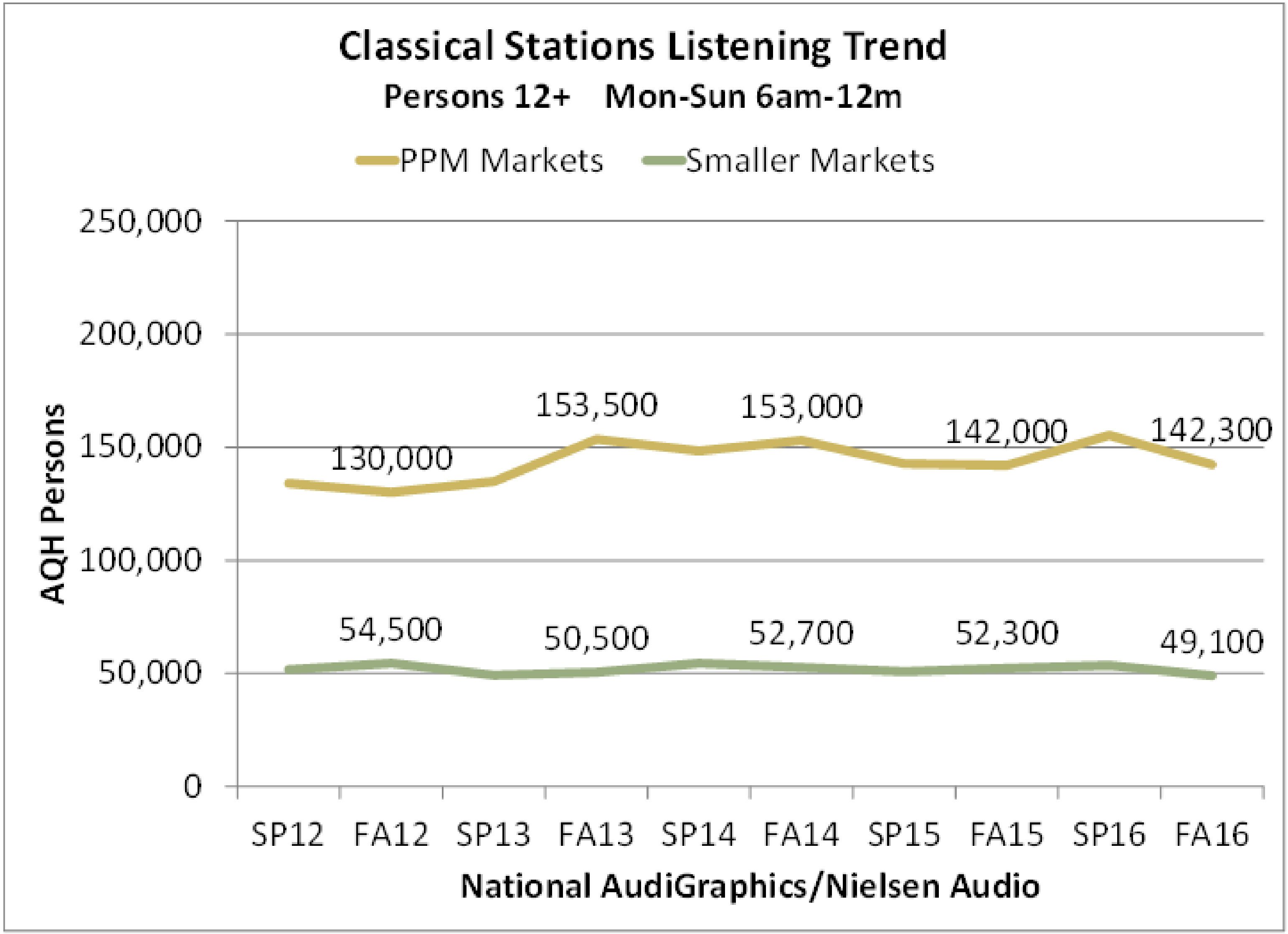
Classical Stations: Markets 26-50

Share of Listening, Metro Survey Area, Fall 2016

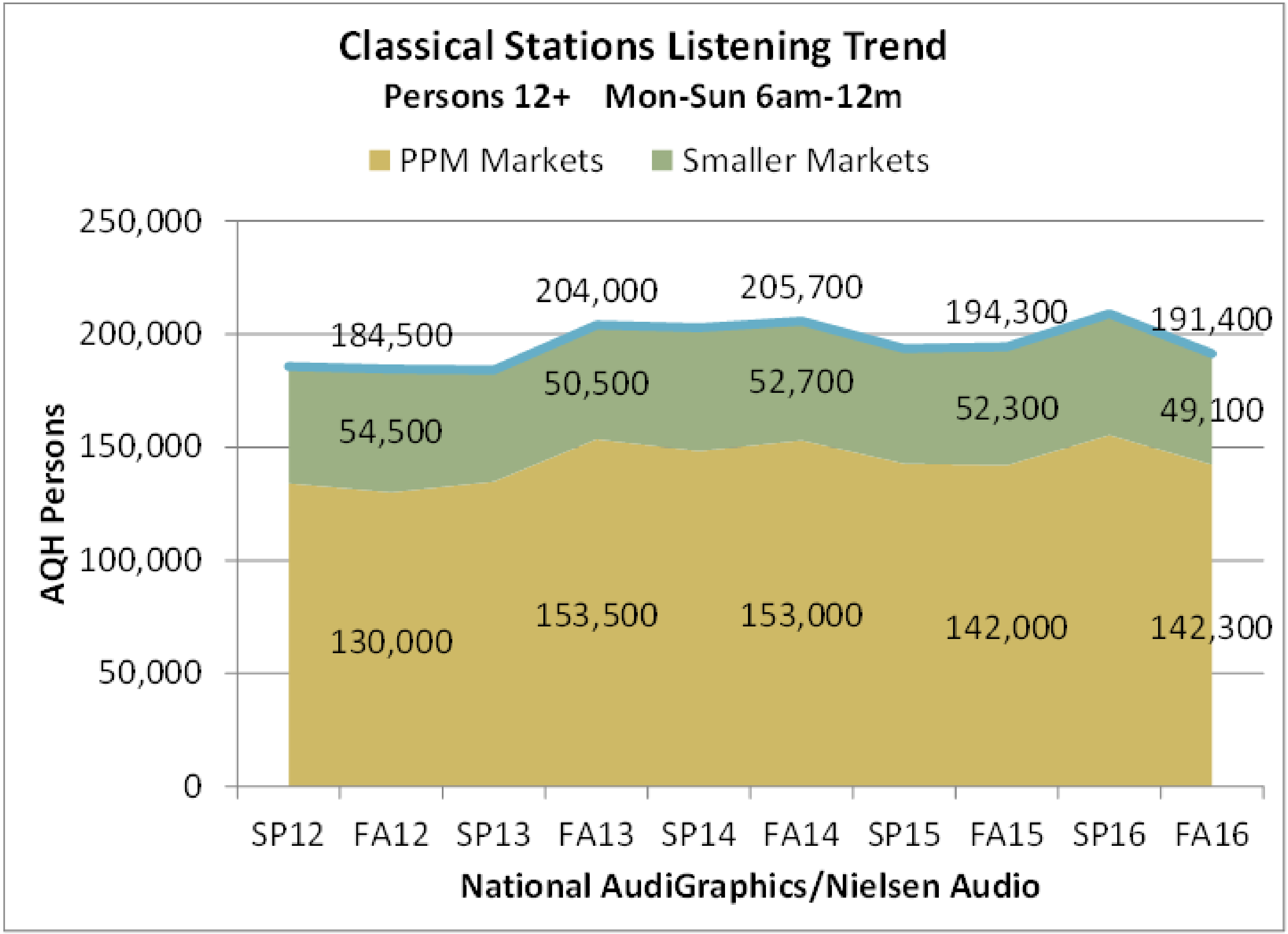


Source: Nielsen; Radio Research Consortium

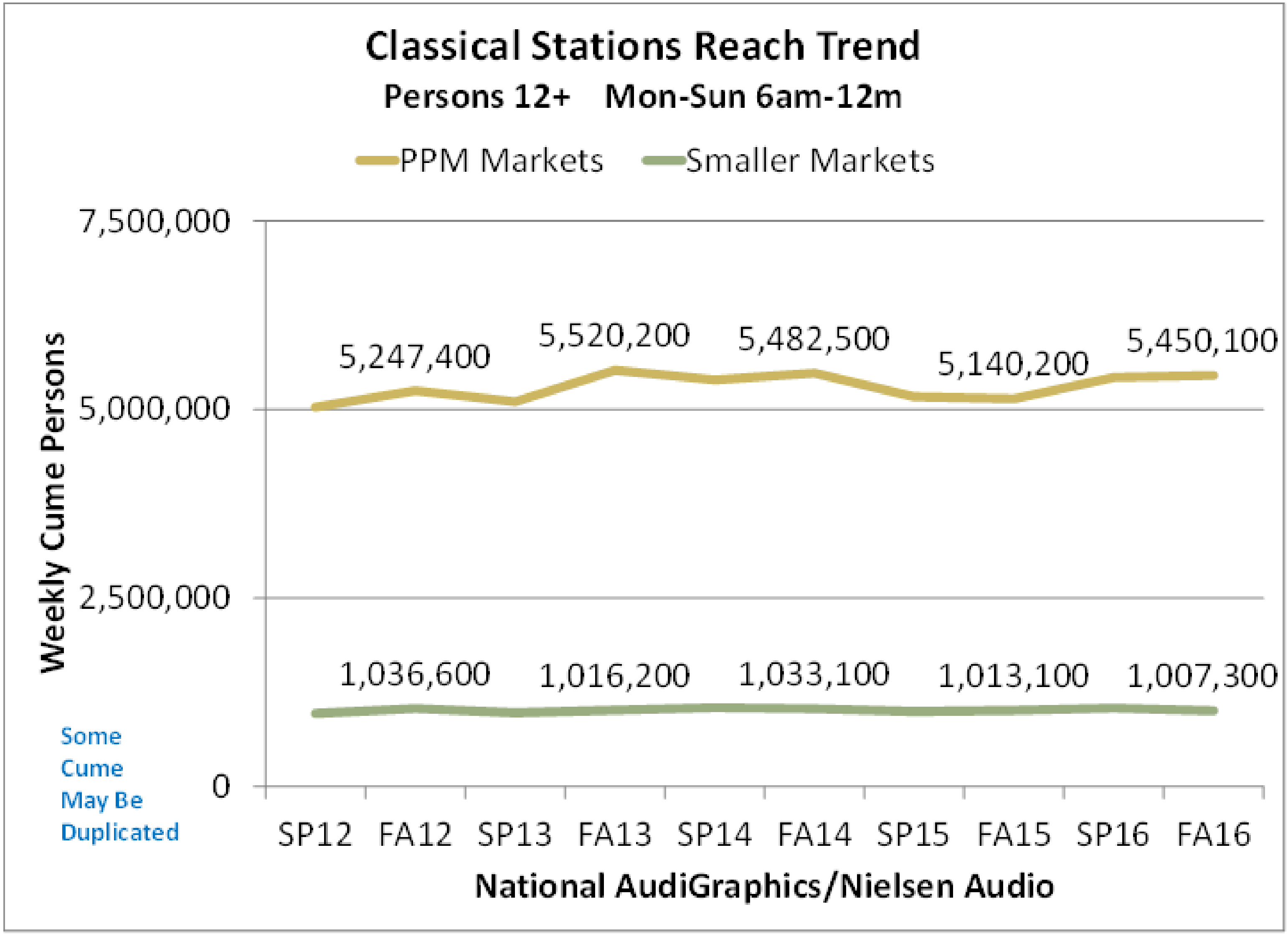
Station Resource Group

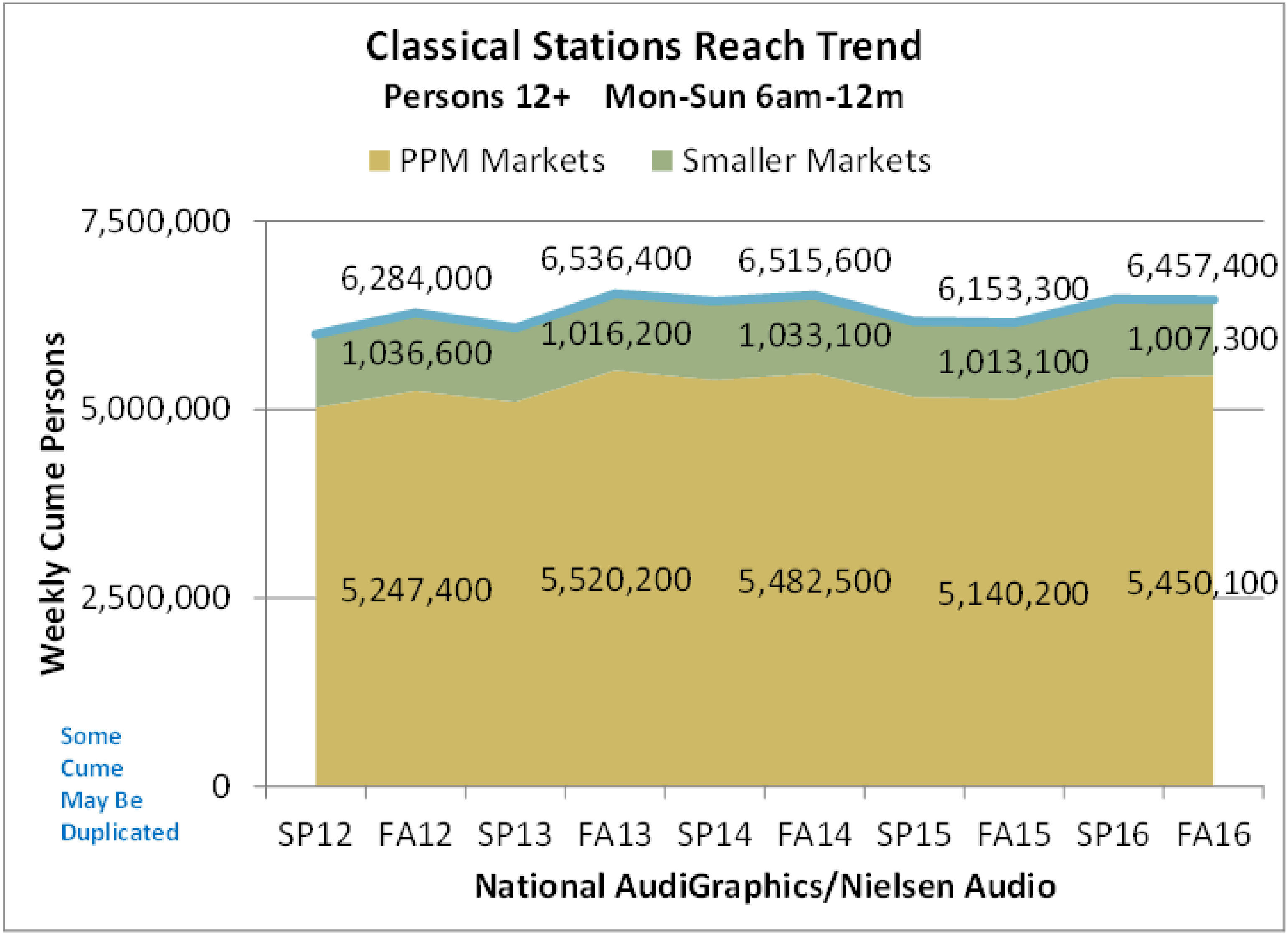


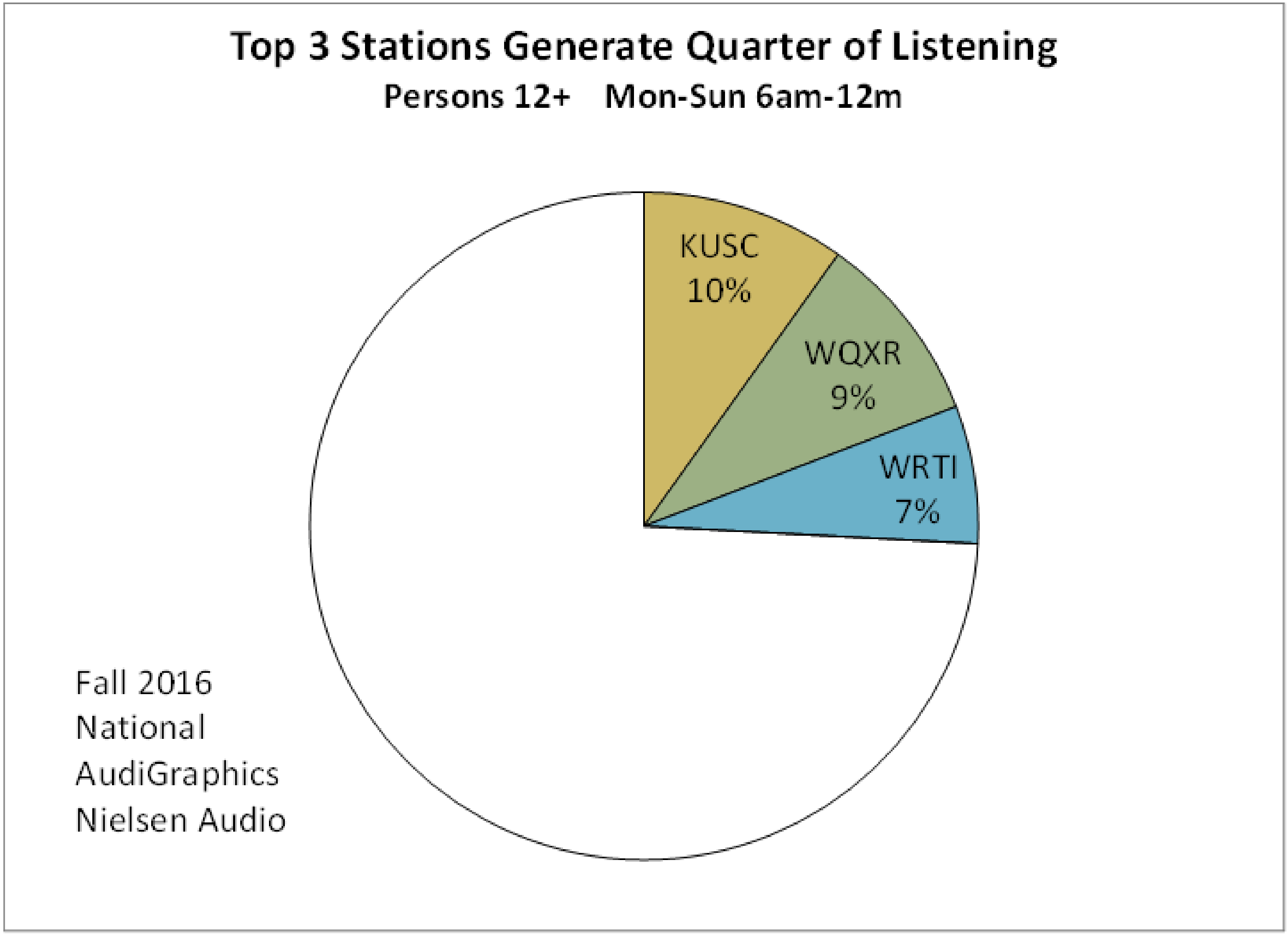
Classical Stations Listening Trend
Persons 12+ Mon-Sun 6am-12m
PPM Markets
Smaller Markets
250,000
200,000
150,000
100,000
50,000
0
AQH Persons
130,000
153,500
153,000
142,000
142,300
54,500
50,500
52,700
52,300
49,100
SP12
FA12
SP13
FA13
SP14
FA14
SP15
FA15
SP16
FA16
National AudiGraphics/Nielsen Audio

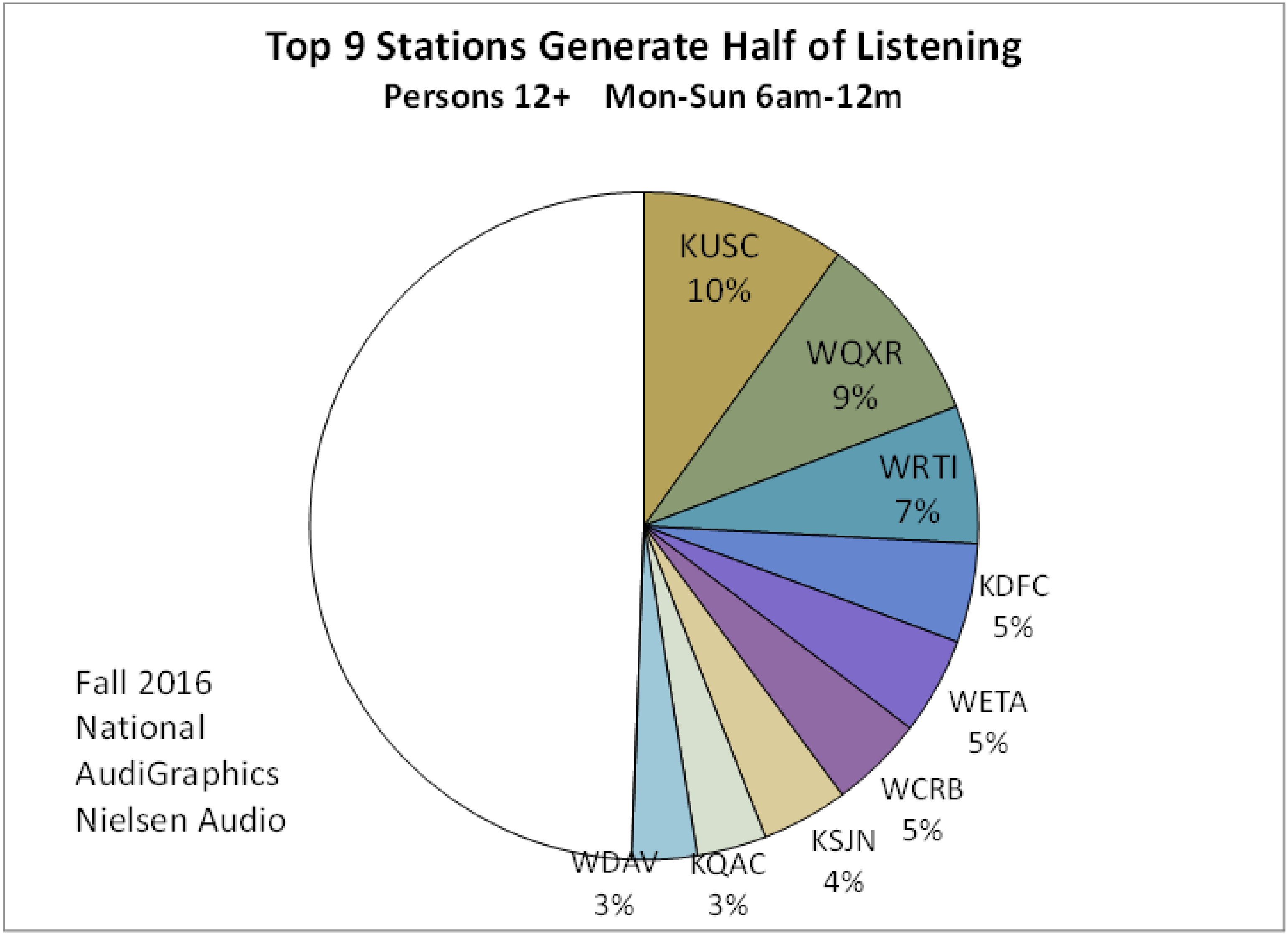


Classical Stations Listening Trend
Persons 12+ Mon-Sun 6am-12m
PPM Markets
Smaller Markets
250,000
200,000
150,000
100,000
50,000
0
AQH Persons
184,500
204,000
205,700
194,300
191,400
54,500
50,500
52,700
52,300
49,100
130,000
153,500
153,000
142,000
142,300
SP12
FA12
SP13
FA13
SP14
FA14
SP15
FA15
SP16
FA16
National AudiGraphics/Nielsen Audio

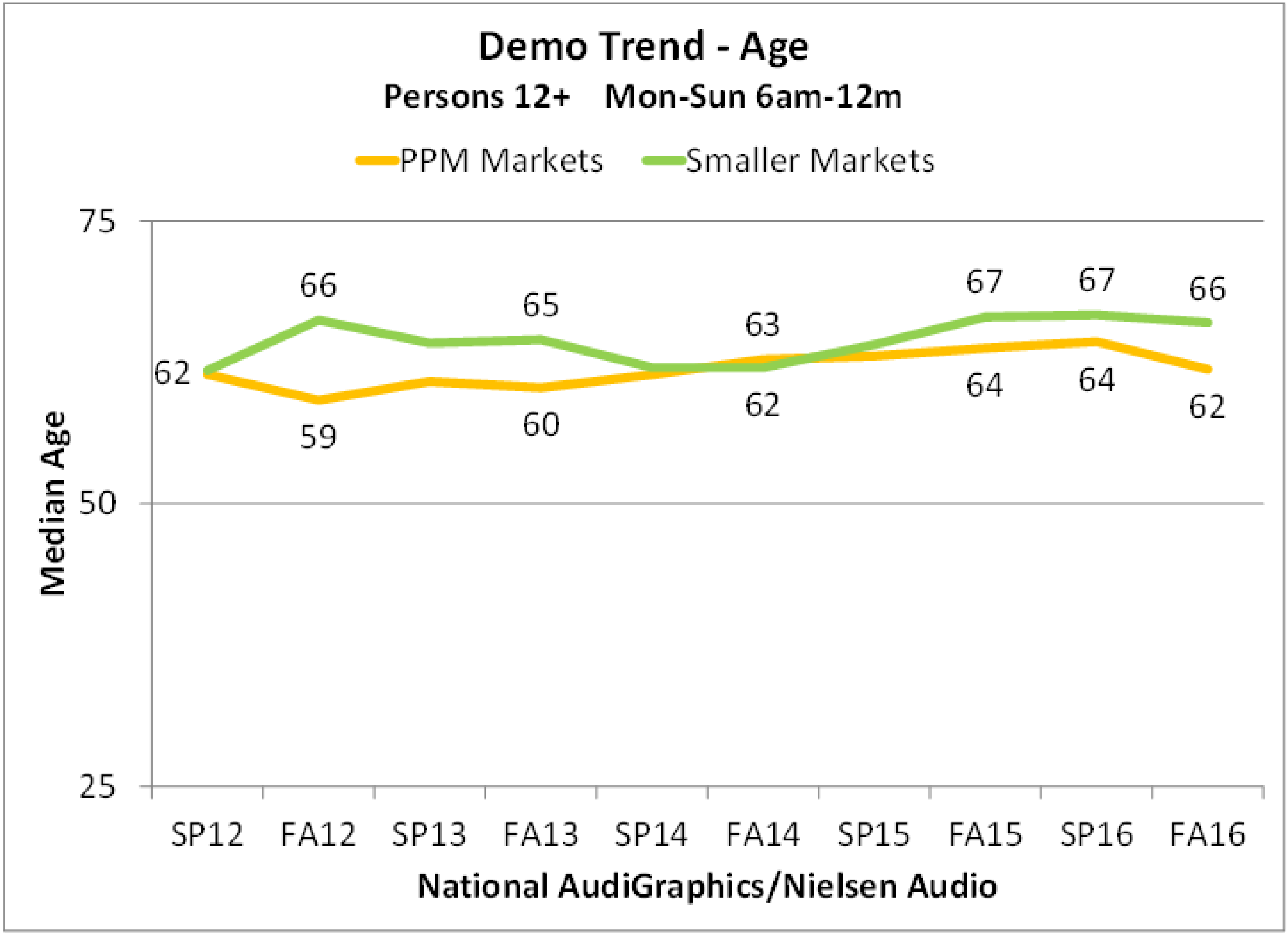

Classical Stations Reach Trend
Persons 12+ Mon-Sun 6am-12m
PPM Markets
Smaller Markets
7,500,000
5,000,000
2,500,000
0
Weekly Cume Persons
5,247,400
5,520,200
5,482,500
5,140,200
5,450,100
1,036,600
1,016,200
1,033,100
1,013,100
1,007,300
Some Cume May Be Duplicated
SP12
FA12
SP13
FA13
SP14
FA14
SP15
FA15
SP16
FA16
National AudiGraphics/Nielsen Audio


Classical Stations Reach Trend
Persons 12+ Mon-Sun 6am-12m
PPM Markets
Smaller Markets
7,500,000
5,000,000
2,500,000
0
Weekly Cume Persons
6,284,000
6,536,400
6,515,600
6,153,300
6,457,400
1,036,600
1,016,200
1,033,100
1,013,100
1,007,300
5,247,400
5,520,200
5,482,500
5,140,200
5,450,100
Some Cume May Be Duplicated
SP12
FA12
SP13
FA13
SP14
FA14
SP15
FA15
SP16
FA16
National AudiGraphics/Nielsen Audio

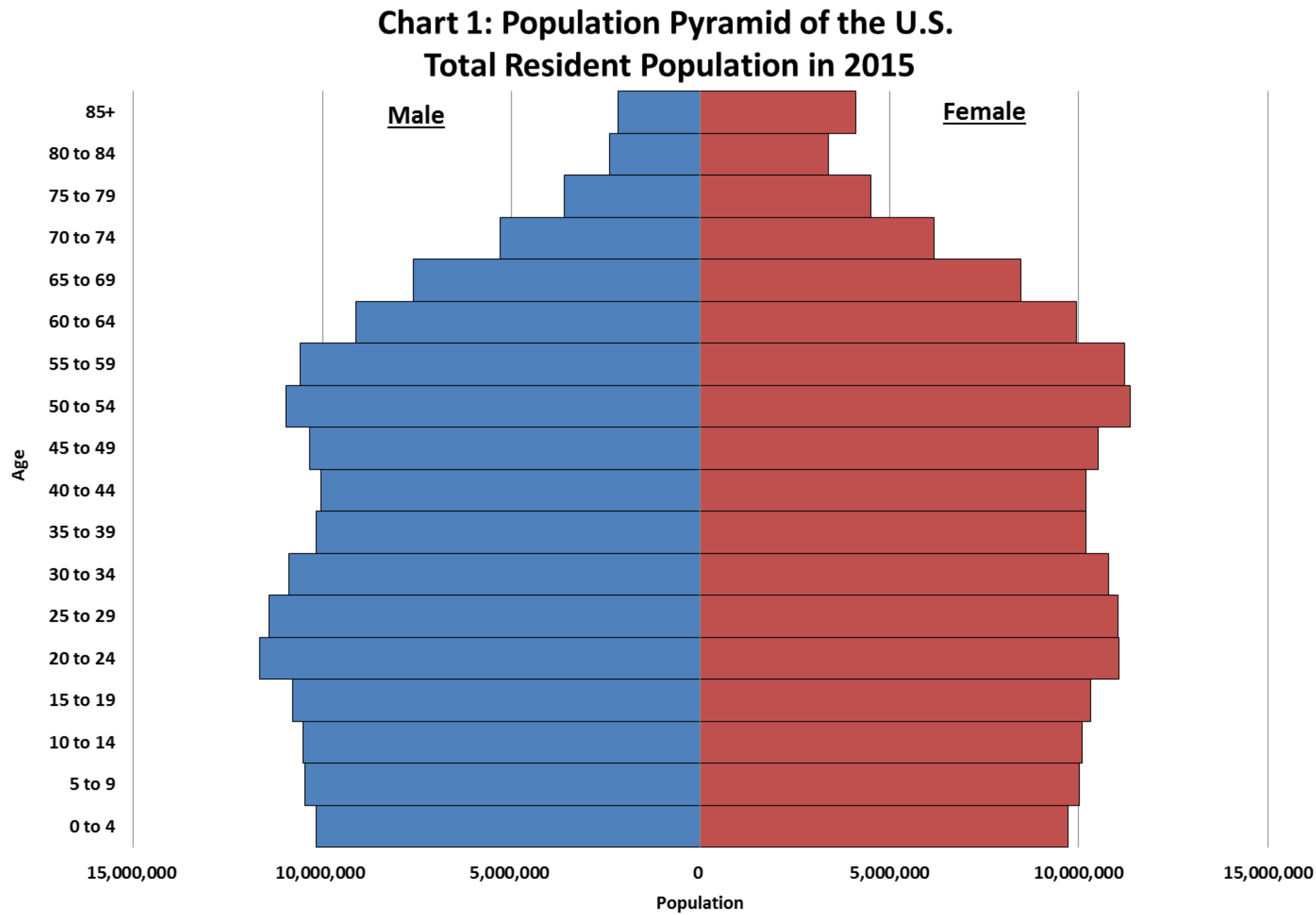

Top 3 Stations Generate Quarter of Listening
Persons 12+ Mon-Sun 6am-12m
KUSC
10%
WQXR
9%
WRTI
7%
Fall 2016
National
AudiGraphics
Nielsen Audio



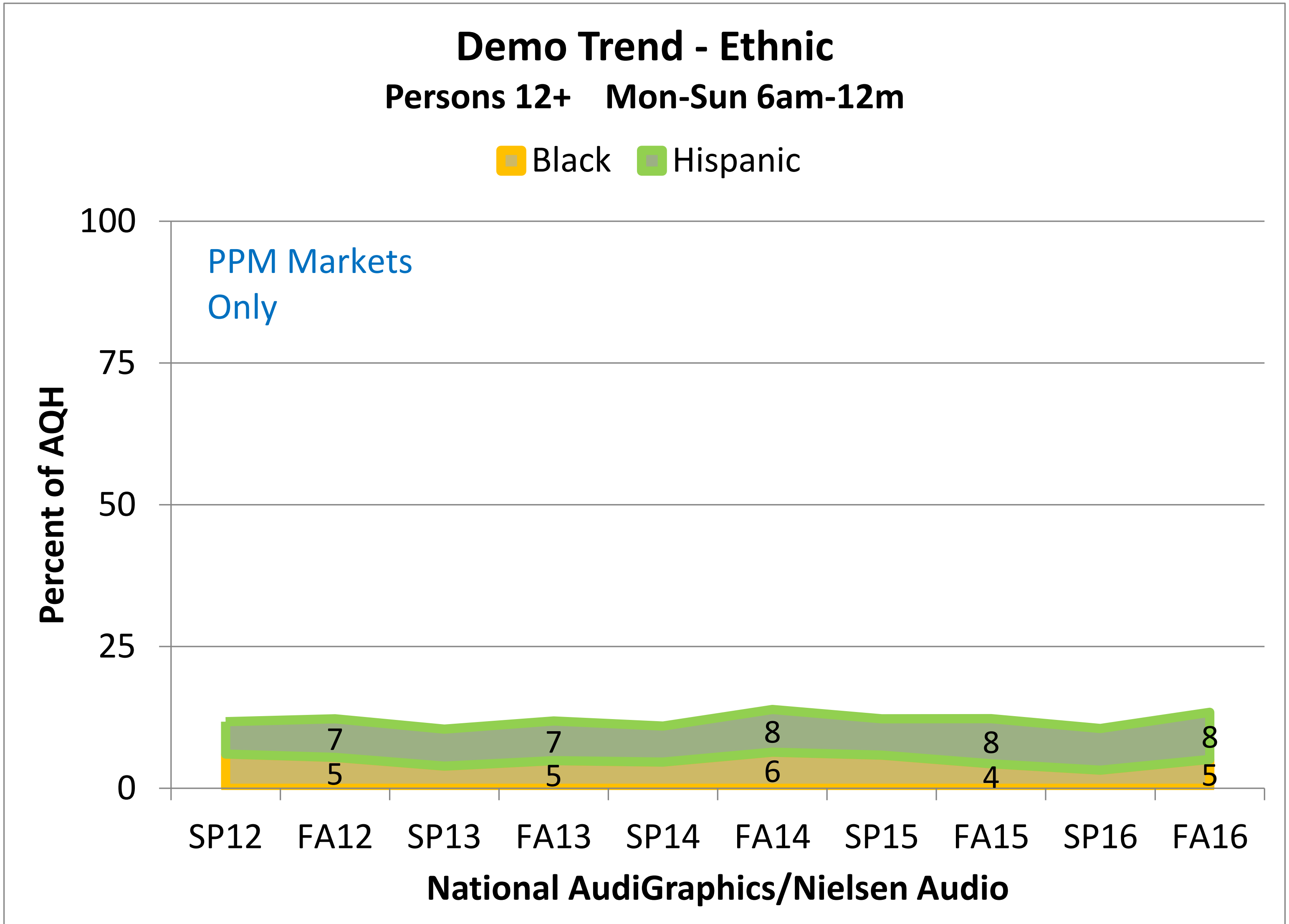
Top 9 Stations Generate Half of Listening
Persons 12+ Mon-Sun 6am-12m
KUSC 10%
WQXR 9%
WRTI 7%
KDFC 5%
WETA 5%
WCRB 5%
KSJN 4%
KQAC 3%
WDAV 3%
Fall 2016
National
AudiGraphics
Nielsen Audio



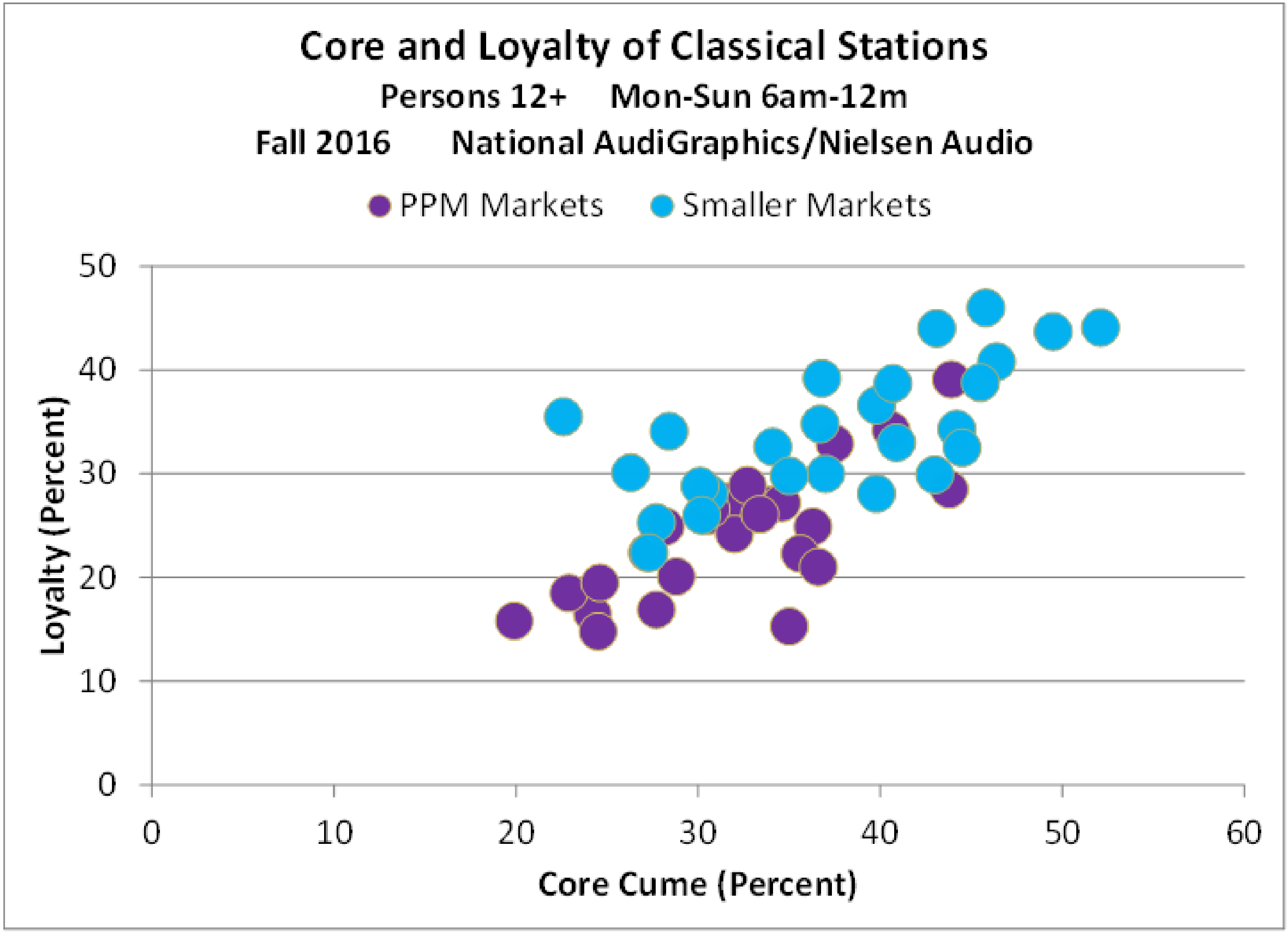
Demo Trend - Age
Persons 12+ Mon-Sun 6am-12m
PPM Markets
Smaller Markets
75
50
25
Median Age
62
66
59
65
60
63
62
67
64
67
64
66
62
SP12
FA12
SP13
FA13
SP14
FA14
SP15
FA15
SP16
FA16
National AudiGraphics/Nielsen Audio

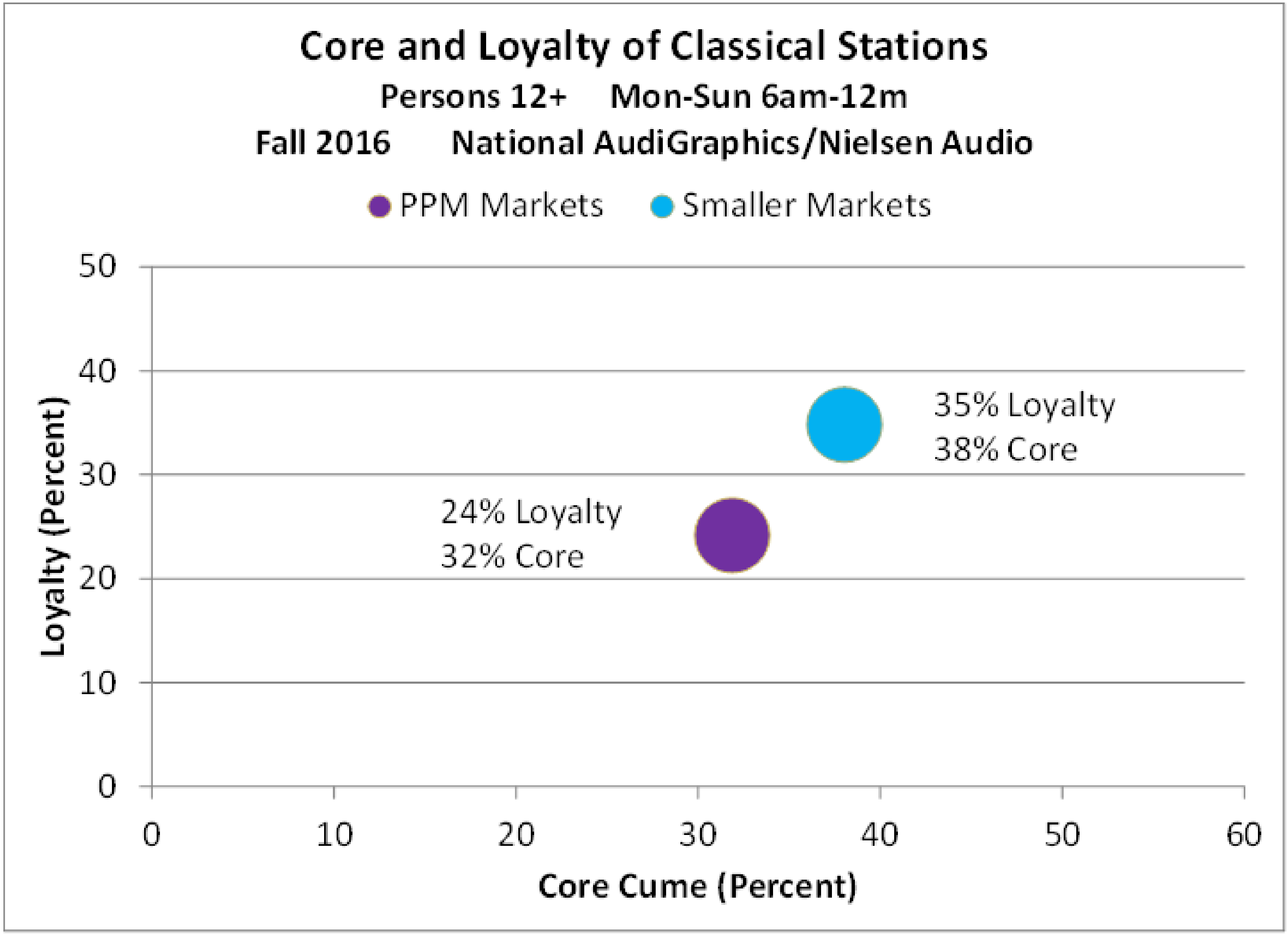


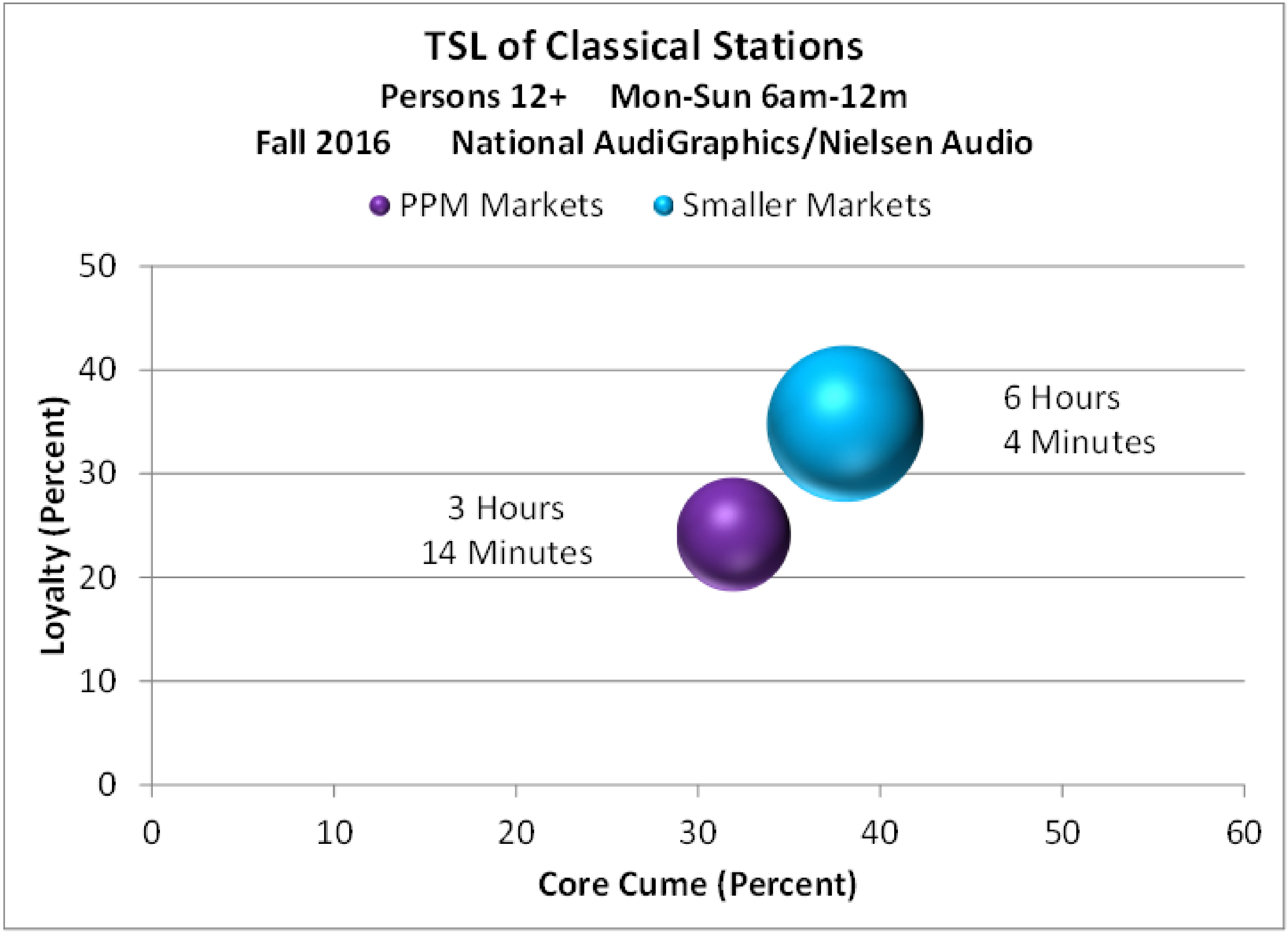
Source: U.S. Census Bureau, Vintage 2015 Population Estimates.


Demo Trend - Ethnic
Persons 12+ Mon-Sun 6am-12m
Black
Hispanic
100
75
50
25
0
PPM Markets
Only
Percent of AQH
7
5
7
5
8
6
8
4
8
5
SP12
FA12
SP13
FA13
SP14
FA14
SP15
FA15
SP16
FA16
National AudiGraphics/Nielsen Audio

Minorities Share of the US Population	
Age Group	***% of Minority Group***
< 5	50.3
5-13	48.7
14-17	46.1
18-24	45.4
25-44	42.8
45-64	31.7
65+	22.2
Source: US Census Bureau, July 2015	

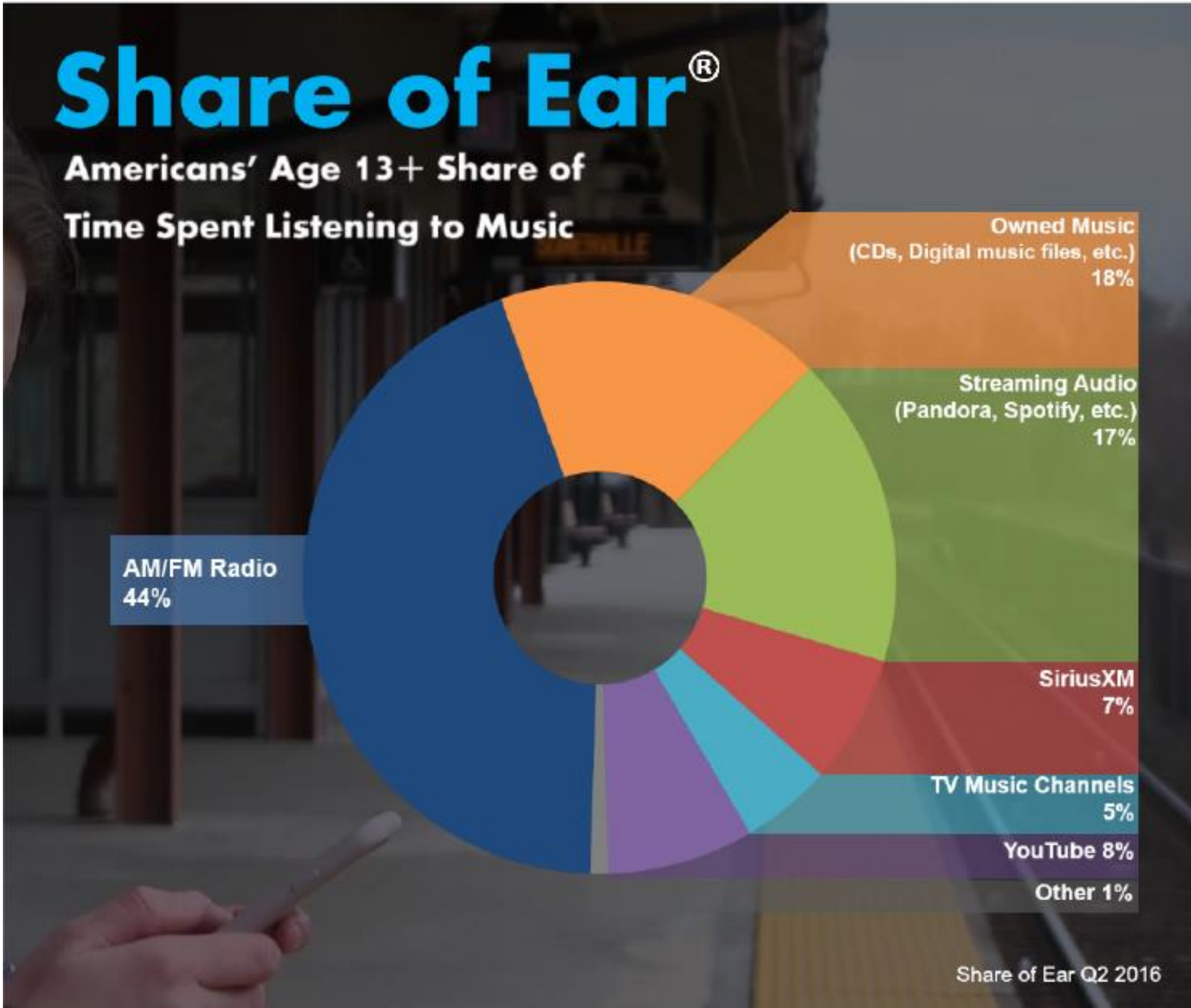

Core and Loyalty of Classical Stations
Persons 12+ Mon-Sun 6am-12m
Fall 2016 National AudiGraphics/Nielsen Audio
PPM Markets
Smaller Markets
Loyalty (Percent)
Core Cume (Percent)
0
10
20
30
40
50
60


Core and Loyalty of Classical Stations
Persons 12+ Mon-Sun 6am-12m
Fall 2016 National AudiGraphics/Nielsen Audio
PPM Markets
Smaller Markets
35% Loyalty
38% Core
24% Loyalty
32% Core
Loyalty (Percent)
Core Cume (Percent)
0
10
20
30
40
50
60


TSL of Classical Stations
Persons 12+ Mon-Sun 6am-12m
Fall 2016 National AudiGraphics/Nielsen Audio
PPM Markets
Smaller Markets
6 Hours
4 Minutes
3 Hours
14 Minutes
Loyalty (Percent)
Core Cume (Percent)
0
10
20
30
40
50
60

Grow the audience

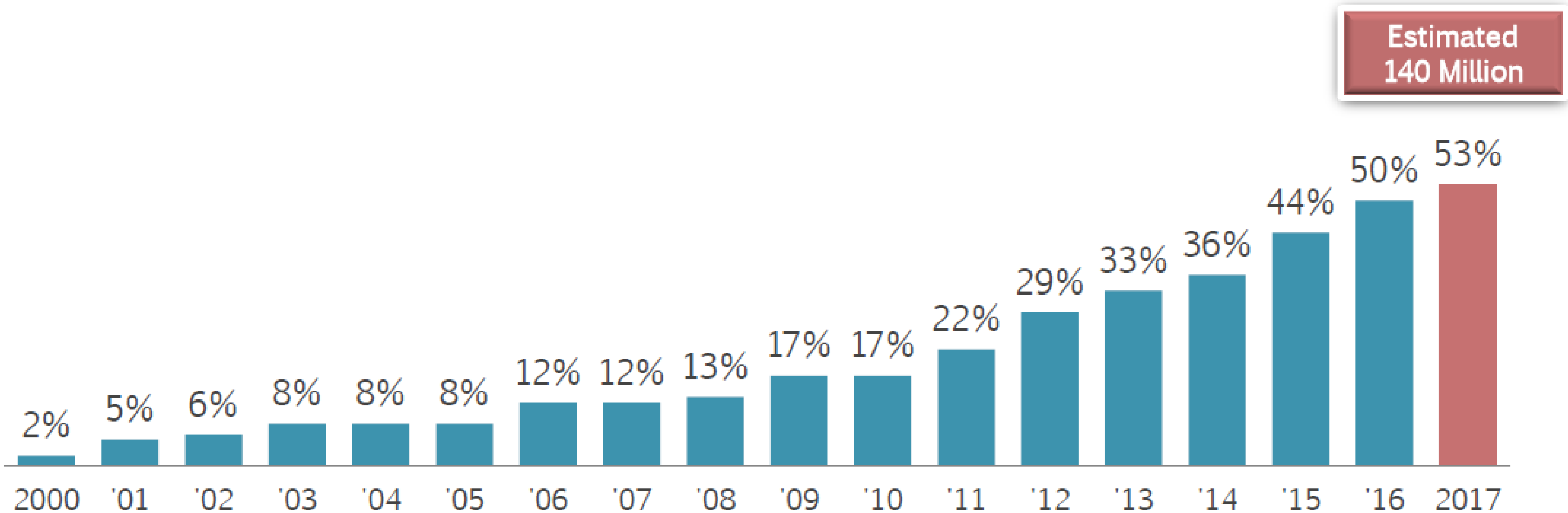
- At any classical station, large or small, program directors must strive to build audience loyalty, core composition and time spent listening.
- TSL is driven by occasions of tune in. We want those listeners within our weekly cume to come back more often, returning for another listening occasion.


Share of Ear®
Americans' Age 13+ Share of
Time Spent Listening to Music
Owned Music
(CDs, Digital music files, etc.)
18%
Streaming Audio
(Pandora, Spotify, etc.)
17%
AM/FM Radio
44%
SiriusXM
7%
TV Music Channels
5%
YouTube 8%
Other 1%
Share of Ear Q2 2016

Weekly Online Radio Listening

THE INFINITE DIAL 2017

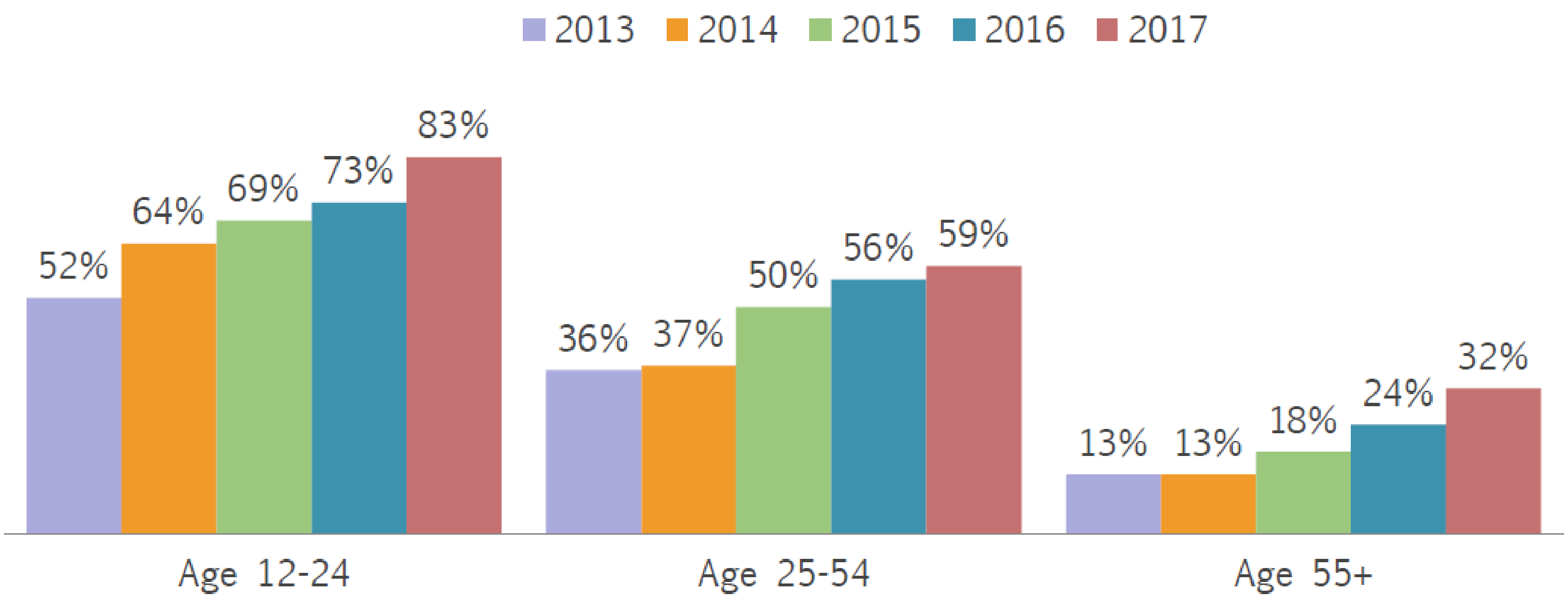
Total Population 12+



% listening to Online Radio in last week

Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

Weekly Online Radio Listening



% listening to Online Radio in last week

Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet

CLASSICAL MUSIC RISING

Classical Music Rising is a project of the Station Resource Group, supported by participating stations and a grant from the Andrew W. Mellon Foundation. For more about the overall project visit *www.ClassicalMusicRising.org*