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

46 stations 7 stations 28 stations 13 stations 16 stations 6 stations

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

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Classical Stations: Top Markets
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Classical Stations: Markets 26-50
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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

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
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

Walrus Research
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
Chart 1: Population Pyramid of the U.S. Total Resident Population in 2015

Demo Trend - Ethnic
Persons 12+    Mon-Sun 6am-12m

Percent of AQH
National AudiGraphics/Nielsen Audio

PPM Markets
Only

Black  Hispanic

SP12  FA12  SP13  FA13  SP14  FA14  SP15  FA15  SP16  FA16
7  5  7  5  8  6  8  4  8  5
<table>
<thead>
<tr>
<th>Age Group</th>
<th>% of Minority Group</th>
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<tr>
<td>&lt; 5</td>
<td>50.3</td>
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<tr>
<td>5-13</td>
<td>48.7</td>
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<tr>
<td>14-17</td>
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<td>45.4</td>
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<td>45-64</td>
<td>31.7</td>
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<tr>
<td>65+</td>
<td>22.2</td>
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</tbody>
</table>

*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)
Core and Loyalty of Classical Stations

Persons 12+  Mon-Sun 6am-12m
Fall 2016  National AudiGraphics/Nielsen Audio

- **PPM Markets**
  - 24% Loyalty
  - 32% Core

- **Smaller Markets**
  - 35% Loyalty
  - 38% Core

Walrus Research
TSL of Classical Stations
Persons 12+  Mon-Sun 6am-12m
Fall 2016  National AudiGraphics/Nielsen Audio

- PPM Markets
- Smaller Markets

Loyalty (Percent)

Core Cume (Percent)

6 Hours
4 Minutes

3 Hours
14 Minutes
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

- AM/FM Radio: 44%
- Owned Music (CDs, Digital music files, etc.): 18%
- Streaming Audio (Pandora, Spotify, etc.): 17%
- SiriusXM: 7%
- TV Music Channels: 5%
- YouTube: 8%
- Other: 1%

Share of Ear Q2 2016
Weekly Online Radio Listening

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

The Infinite Dial © 2017 Edison Research and Triton Digital
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

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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](http://www.ClassicalMusicRising.org)