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PUBLIC RADIO IN 2000

From a Presentation to the PRPD Board of Directors
Washington, DC, June 17, 1995

by David Giovannoni

I don't run a station, although many producers accuse me of running yours. I am, however, privileged to work with most of you as well as folks at the national level, and this experience imparts a perspective not seen by everyone.

I'm very optimistic about the future — five to ten years out. I'm optimistic because public radio will be defined not by political forces but by the programming we carry, the listeners we serve, and our non-commercial nature.

Today we're focused on the potential loss of federal subsidies. If they decline at a responsible rate, the public radio industry will be propelled into a much better place than it is today. We will be compelled to make decisions based on public service; that makes us better.

Sure we're not there yet; indeed, the immediate and sudden removal of federal support would be an irresponsible assault on a service the country has invested heavily in for several decades. But as we come to Washington this week to artificially respiration the old and dying economy, we can look forward to a healthier and more sustainable new economy five years out.

Public radio's new economy is programming — not politics.

The role of PD assumes a far greater importance in this new economy, because public stations and their programming must be-

come even more important to more people. In five years the programming-focused PRPD conference will have displaced the politically-focused PRC in importance. Maybe it has already.

Let's look past the crisis de jour and prepare ourselves for the real work ahead.

The immediate future is radio as we know it. Don't let the pundits of possibilities distract you from your daily realities.

Five years from now we'll still be providing our service through terrestrial analog transmissions. Not digitally. Not with direct broadcast satellites. Not over the Internet. Not for five years, and probably not in ten.

We know from our study of technological diffusion that if digital terrestrial or satellite transmission became available today it would be at least ten years before it became a force. Will it be with us in the future? Certainly. Should we change the way we do business in the next five years in anticipation? Probably not.

Similarly, many in public radio are being seduced by the possibilities of inter-connectivity. Like digital and satellite transmission, the utility of the World Wide Web is certainly coming, but it will be decades before you have as many people tuned to it as are now tuned to your radio station.

Many in public radio are spending inordinate amounts of time developing Web pages and

so forth. We have to be careful here. Ask yourself what business you're in. Like the public television stations that made the mistake of starting magazines, we may be getting into the wrong industry. Don't get me wrong — it's fine to claim the territory in cyberspace, but let's be realistic about the returns and invest our time, attention, and resources accordingly.

We also should be careful about the ability of the Internet to draw our attention away from public service. Managerially we must discipline our own use of the new toys.

PubRadio is a terrific resource with many applications. But today there is an inverse relationship between words posted on PubRadio and people listening to the poster's station. It's simple cause and effect: time spent on PubRadio is time not spent on listeners. It's become an electronic variant of yakking around the water cooler. Managers must get this under control.

Enough about the technology. What does the future hold for public radio programming? Think "significant programming for significant audiences." Think "importance in people's lives." Think "public service."

I don't want to hear anyone say "build audience" again. We don't have to "build" an audience. We have an audience. What we have to build is audience service. We must focus on better serving the audience we have. I look at your audience data regularly and I assure you, we can all do better.

We've come a long way in the twenty years many of us have been in the business. But public radio's schedules remain rife with weaknesses.

We have the tools to identify them quickly. Look at the Loyalty section of your Audi-

Graphics. In ten seconds you'll identify the strengths and weaknesses in your schedules. Listen to the quality programming on the satellite. There's no shortage of it. Pick something that will work better. Put it on the air. It's not rocket science. Just do it. It's your job.

Focused as we must be on public service, and given the abundance of quality programming in public radio, there is no reason for any program service to be sub-standard at any time. As Israel Smith says, "Stations have to make every daypart count." A daypart is indeed a terrible thing to waste.

Listener loyalty is increased by finding programs that appeal to the same person across the day and across the week. At many stations building on the primary format will be the quickest, surest way to better serve listeners.

At many stations — but not all — the primary format is NPR news. The jazz or classical music at some of these stations could be taken off tomorrow and they wouldn't lose many listeners. If NPR news goes away tomorrow they'd die. NPR news is beyond critical mass; it defines the niche that defines public radio in most listeners' minds. And although it's not the core service at all stations, preserving and enhancing national news is critical to the survival of this enterprise.

Does this mean these stations should go "all news?" Absolutely not. Focusing on a certain type of listener doesn't require focusing on a single type of programming. Non-news shows like *Car Talk* and *Prairie Home* are among the most listened-to in public radio. Not only do they offer entertainment to the NPR news listener, more importantly they are imbued with the values and attitudes held by the NPR news listener.

They speak the language. They know the code. They “get it.”

As we focus on audience service in the next five years, we’ll find more national and less local programming on our stations. The reason is simply economic — produce once, distribute to many. Indeed, many stations can no longer afford to be local. In many cases this will be a terrific loss; in others it will be a fortunate, long overdue, and welcome development.

Local production may in fact become an economic luxury. Whatever endeavors you undertake locally will have to be extremely good, highly concentrated, and shared with other stations. Again, the produce once, distribute to many economic efficiencies are inescapable — even for locally-produced programming.

What happens to creativity? What happens to new talent and new ideas? As always, the most creative programming ideas and the best talent are forged in local crucibles. It will become even more incumbent on PDs to identify and nurture your best talent — as MPR did with Keillor, as WBUR did with Tom and Ray, as WHYY did with Terry Gross, as Wisconsin did with Feldman, and so forth.

Then make that talent available to other stations. Share the wealth and share the cost. We have the world’s preeminent audio satellite system that will allow us to do that.

We don’t have to keep 200 classical music libraries across the system. There is nothing local about classical music; there is nothing local about jazz. It’s *presentation* — yes, that might benefit from being local — but it’s *selection*, that need not be.

The changing economics of public radio will

accelerate the pace with which multiple stations in the same market claim audience niches. It would be better if networks led this movement, but history teaches that you’ll lead the way instead.

Networks will ultimately follow your lead and reform their programming, sales, and pricing structures around “networks of interest” — that is, programming that appeals to a certain kind of listener.

Streams defined by genre are what we have now. The next step is to reshuffle programs into appeal-based streams. *Car Talk* belongs in the same stream as NPR news magazines, for instance.

The key of course is to get beyond the idea of “genre” and adopt the tenets of “appeal.” Public radio will become more important to more people by providing a variety of high quality programming to a consistent listener. Today too many stations undermine their own public service by attempting to serve a wide variety of listeners with a wide variety of programming. We’ve been down that road and we know where it leads — to stations that won’t be with us in five years.

Consolidation of services will gain prominence in the next five to ten years. We will see two or five or 25 stations being run by the same management team — perhaps a management team that is not resident at any station. There are 250 licensees right now, each of which oversees the management of its own station(s). There may be the same number of licensees in five years, but the number of managers and managing organizations will shrink.

Indeed, there may be fewer stations. There are 600-plus stations right now doing something like public radio. There will be 600-minus in five years. Without CPB defining

who's "in" and who's not, the idea of a "system" becomes less meaningful. Again, public radio will be identified less in policy and political terms, and more by the programming you carry, the audience you serve, and your non-commercial nature.

Let's return to economics for a moment. Public radio relies more each year on listener and underwriter support. Despite pressures to the contrary it is imperative for public radio to remain steadfastly non-commercial.

We can not afford to allow our services to sound remotely commercial. Everything we know from research is that people appreciate — and support — our non-commercial constitution. That cannot be compromised.

Nor can our quality or values. More on this in a minute.

I just finished an analysis of stations put at greatest risk by the reduction of federal support. One of the prime determinants of risk — of their likelihood of going dark — is that they spend more than 15 cents to serve one listener for one hour. The system average is about five cents.

Most of you can recite your cume and share but I'll bet you don't have a clue what it costs for your station to serve one person for one hour. In five years you will. Cost-per-listener hour is going to become a very important statistic in the next few years as it becomes a primary determinant of viability.

Today PDs look at the cost of a program. Tomorrow you'll have to think in terms of cost per listener that the program will serve. Again, it all ties in to the listener-based economy. If it costs you a dime to serve a listener for an hour and you only get a nickel back, you're not going to be on the air very long.

Sometimes the most expensive programming is the best investment a station can make; sometimes free programming is no bargain.

When will the networks figure out that money follows audience, not transmitters? Will they be able to adopt their pricing and begin charging accordingly when they do?

About a dozen stations deliver one-third of the audience to NPR News magazines. Will these stations ever bear one-third of the cost of the programs' production? Can they? Will they? I avoid predicting the behavior of public broadcasters. But these are interesting questions that we'll be facing in the next five years.

One of the most powerful ideas you can adopt today is a refined notion of localism and community. The quicker we get away from defining community in geographic terms, the better off we'll be. Today in America "community" is defined by the interests that people have — not by where they live. And although geographic communities will always be where our bodies live, our heads live in non-geographic "communities of interest."

Community is increasingly defined by the media content or programming that people choose to use. Public radio itself demonstrates this perfectly. There is a community in America — more than 10 million strong — who coalesce around NPR news. Notice I don't call it a "virtual" community; this community is as real, as tangible, as involved in its "neighborhood" as any geographically-based community is today. Perhaps more so.

For those of you whose service centers on NPR news, this is where your listeners live. This realization will change the way you

approach decisions. Your job is to create or acquire programming, and to identify and develop talent that serves this community. Your job is to fill your schedules with the best programming available.

It changes my job as a researcher as well. No longer can researchers simply report warm bodies. My job is to provide you with tools and information that address this more sophisticated level of decision-making.

Let me conclude with some thoughts about public radio's quality and the values inherent in our service.

The way we think about and approach our services, our listeners, our programming, our economics, our technologies — these will mean nothing if public radio sells out. We must maintain and enhance the quality of our service. We must remain important to people. We must remain a significant, value-

driven program service if we are to become an even more significant force in American life.

If the time ever comes when we're not there for our listeners in our best high-quality, non-commercial, listener-oriented mode, there will be no reason for people to support us, we'll go off the air, and frankly we won't be missed.

Predicting the future is a tricky business at best. But one thing is for sure: change is the only constant. We're going to see many changes in the way we do business in the next five years. The PDs job is to guide these changes carefully and react to them appropriately. If every change and decision is made with the interest of the listener in mind, we will be a whole lot better off in five years than we are today.