



## Audience Opportunity Study Summary of Key Takeaways *Summer 2010*

What follows is a high-level summary of findings and conclusions. A detailed report with more elaborate plans, strategies and tactics will follow in September.

### Project Overview and Methodology [Enhanced Section for Current]

On behalf of NPR, SmithGeiger conducted a research study to guide the growth strategy of NPR and member stations. A key goal of this study is providing a detailed profile of the current and potential NPR audience, focusing on the attitudes and values of core and target listeners, and how this shapes their media consumption.

This study concentrated on three key growth opportunities:

- ≡ Current news and talk radio consumers who are **not** turning to NPR (e.g. “lookalike” and “low hanging fruit” audiences)
- ≡ Current audiences for which NPR underperforms relative to the US population: including ethnic minorities, younger audiences, and self-identified Conservative/Republican target listeners
- ≡ Digital and cross-platform growth (online, mobile)

All study respondents were required to be at least weekly consumers of news and information. A subsample of these news consumers were casual or core NPR<sup>1</sup>. This research was conducted in four key phases:

- ≡ Phase 1: Kickoff meetings (November 2009)
  - Executive and team meetings at NPR to establish project goals. Meetings amongst Executive Leadership, Digital Media, Newsroom, Diversity Council
  - Conference calls with external stakeholders (stations in markets representing significant diversity opportunity, SRG, PRPD)
- ≡ Phase 2: Quantitative online survey (March/April 2010)
  - 3,710 total respondents
    - 2,010 respondents across the U.S.
    - 1,355 respondents across 13 key DMAs. Selected in consultation with the CPB (New York, Los Angeles, San Francisco, Atlanta, Philadelphia,

<sup>1</sup> Other parameters include being open to public radio and expressing interest in at least one NPR topical category. Respondents who did not possess a formal 4-year college degree were required to place a high degree of importance on at least one of community leadership, education, and/or lifelong learning.



- Washington DC, Chicago, Houston, Dallas, Phoenix, Detroit, Miami, and Baltimore)
- 345 listeners from the NPR panel
  - Median time to complete online survey: 42 minutes
- ≡ Phase 3: Online Message Board Forums (April/May 2010)
  - Moderated message boards include three days of discussion on the role of media, NPR, and NPR programming (including digital properties)
  - 7 key target groups: NPR core listeners, NPR “outliers,” NPR digital users, NPR entertainment programming listeners, “Lookalikes,” ethnically diverse target audiences, Conservative/Republican target audiences.
- ≡ Phase 4: In-Home Ethnographic Interviews (June 2010)
  - In-home interviews with members of three key audience segments
  - Total of 13 interviews held over four days in San Francisco, Dallas, Atlanta, and Philadelphia
  - Audience segments profiled: Dutiful Aggregators, Team Captains, and Voracious Voyagers. Two other segments were identified; however, they present limited opportunity.

#### Screening Criteria for National Sample for the Quantitative Survey

- ≡ Ages 18-64
- ≡ Even gender split
- ≡ All study respondents were required to be at least one of the following:
  - Casual or core NPR consumers
  - Weekly or greater news/information consumers
- ≡ Non-consumers of NPR were required to be open to public radio and express interest in at least one NPR topical category (politics, sports, entertainment, medical issues, science, health and wellness, culture and arts, current events/newsmakers, technology and gadgets, environmental issues, popular culture, economics, policy and government legislation, business, finance and investing.
- ≡ Respondents who did not possess a 4-year college degree were required to place a high degree of importance on at least one of the following:
  - Community leadership
  - Education
  - Lifelong learning

NOTE: This report represents a summary overview of key headlines emerging from this study; a complete detailed report is due in September 2010. Unless otherwise specified, all data in this overview reflect the National Sample respondent base from the Phase 2 online survey.



## Understanding the Target Audience: A Segmentation Overview

Based on the quantitative survey data, SmithGeiger has identified five distinct audience segments, three of which present NPR with significant potential opportunities for growth:

### Key Segment 1: Dutiful Aggregators

The Dutiful Aggregators group is characterized by prodigious media consumption, an abiding desire to understand all sides of an issue, and a need to take advantage of all that life offers. They are well-informed, with a broad array of media sources consumed in a typical week. Members of this group see life in shades of gray, with moderated and often conflicting opinion sets. They want to see all sides and consult all resources. Much of their behavior is dictated by a sense of internal (rather than social) obligation to *do* and *think* and *understand* more, often resulting in a feeling of being overwhelmed. These consumers are so plugged in that they sometimes feel like they're being electrocuted: they double the national index for "In this age of information, I feel overwhelmed by all there is to know." They are the most avid public radio listeners of any segment, nearly half listen to a public radio station and 39% listen to NPR specifically each week.

**NPR growth opportunity:** While this group has the heaviest NPR listenership composition of the five segments, **3 in 5 Dutiful Aggregators still don't listen to NPR on a weekly basis**. Further, this group is the least positive toward NPR of the three key segments; they rely on NPR but aren't necessarily evangelizing and participating with NPR. They don't donate as often to public as Team Captains or Voracious Voyagers. Addressing key negatives with this group, all of which center around the theme of accessibility (outlined in the next section), may help to improve word-of-mouth and membership/donor loyalty with this segment.

### Dutiful Aggregators by the numbers

- ≡ 19% of national sample
- ≡ 56% male
- ≡ 45% age 18-34
- ≡ 40% non-white (most of any segment)
- ≡ 11% Asian/Southeast Asian/Pacific Islander (most of any segment)
- ≡ 39% weekly consumption of NPR on public radio
- ≡ 29% self-identify as liberal, 35% self-identify as conservative
- ≡ 39% self-identify as Democrat, 18% self-identify as Republican

### Dutiful Aggregators value mottos

- ≡ "Education is important to me."
- ≡ "I make it a priority to continuously learn new things."
- ≡ "Spending time with my family is important to me."



### The Type of Statement You Might Hear from Dutiful Aggregators

- ≡ “I don’t believe in absolutes.”
- ≡ “Of course I check a variety of news sources. Everybody should be informed.”
- ≡ “I really need to get in shape.”

### **Key Segment 2: Team Captains**

Team Captains are characterized by a sense of optimism, self-confidence, and enthusiasm for life. Unlike Dutiful Aggregators, Team Captains are likely to stake out strong, self-assured opinions. Where others see obstacles, they see opportunity – when life gives them lemons, they open a lemonade stand. Indeed, Team Captains are more business-oriented than members of other segments, and though they place a high value on being informed, they often turn to quick headlines to meet that need during their busy day. They believe that others see them as leaders, and they approach life with a sense of certainty, clarity, and possibility (77% agree strongly that “I have the freedom to choose who and what I want to be”). Team Captains are fairly positive toward NPR -- they think of NPR as informed and intelligent and feel as strongly as Dutiful Aggregators that NPR is for them. Yet many Team Captains are already habituated to getting their news from TV and web portals; they’re more likely than Dutiful Aggregators to *intend* to listen to NPR, but they’re less likely to actually do so.

**NPR growth opportunity:** Winning over a Team Captain means winning over a leader. **More than 3 out of 5 Team Captains still don’t listen to NPR on a weekly basis.** But this group is time starved and knows how to prioritize its free time. In order to bridge the gap between intent (I want to listen to NPR) and behavior (I do listen to NPR), Team Captains may need NPR to cut to the chase at times; breaking news with frequent updates is a critical point of entry for this group. Team Captains also expect a balance of perspectives on different issues, and it’s important to understand that this group has a politically mixed composition. While Team Captains reflect America’s current skew toward voting Democrat, they more often consider themselves to be conservative than liberal.

### Team Captains by the numbers

- ≡ 21% of national sample
- ≡ 58% male
- ≡ 45% age 45-64
- ≡ 37% non-white (second most of any segment)
- ≡ 21% Black/African-American (most of any segment)
- ≡ 30% weekly consumption of NPR on public radio
- ≡ 21% self-identify as liberal, 41% self-identify as conservative
- ≡ 34% self-identify as Democrat, 22% self-identify as Republican



### Team Captain value mottos

- ≡ “Spending time with my family is important to me.”
- ≡ “I believe there’s something out there that’s bigger than all of us.”
- ≡ “I have the freedom to choose who and what I want to be.”
- ≡ “There are so many things I still have left to do in life.”
- ≡ “Technology creates new possibilities.”
- ≡ “Education is important to me.”
- ≡ “I make it a priority to continuously learn new things.”
- ≡ Also index high on: “I’m very optimistic about my future,” “I believe I can make the world a better place,” “I’m curious about the world around me,” “I’m constantly trying to improve and evolve as a person,” “I trust my instincts,” “I like the person I am,” “Others consider me a leader.”

### The Type of Statement You Might Hear from a Team Captain

- ≡ “I’ll go first!”
- ≡ “When I read an interesting article online, I share it with all my friends on Facebook.”
- ≡ “I can get everything I want to know in one place on Yahoo!”
- ≡ “I’m leading my ideal life.”

### **Key Segment 3: Voracious Voyagers**

Voracious Voyagers are characterized by a liberal, scientific filter for the world and a penchant for diving deeply into whatever they do – they are often passionate about their hobbies. They typically embrace technology, explore culture, and eschew organized religion. They approach life with a sense of adventure and curiosity (3 in 4 say that they’re “curious about the world around” them). This group also has the most positive halo toward NPR, over-indexing on nearly every positive attribute (though they actually listen less often than Dutiful Aggregators). These heavy web users express as much interest in visiting NPR online as they do on-air.

**NPR growth opportunity:** Voracious Voyagers are NPR’s biggest evangelists. **More than 3 out of 5 Voracious Voyagers don’t listen to NPR on a weekly basis.** They participate with NPR, they go to the website, they tell their friends about NPR – and they’re full of positive commentary. Voracious Voyagers are, in essence, public radio’s best ally. But there is a downside to their enthusiasm -- they’re also controlling and framing what others know about NPR and public radio. If others think NPR is liberal or unbalanced, it might be in part because they have a liberal Voracious Voyager friend or colleague who raves about NPR.



#### Voracious Voyagers by the numbers

- ≡ 21% of national sample
- ≡ 54% male
- ≡ 50% age 18-34
- ≡ 75% white
- ≡ 16% Hispanic/Latino (most of any segment)
- ≡ 27% weekly consumption of NPR on public radio
- ≡ 57% self-identify as liberal, 13% self-identify as conservative
- ≡ 34% self-identify as Democrat, 6% self-identify as Republican

#### Voracious Voyager value mottos

- ≡ “There are so many things I still have left to do in life.”
- ≡ “It’s important to me to make time for fun.”
- ≡ “I’m curious about the world around me.”
- ≡ “Technology creates new possibilities.”
- ≡ Also index high on: “I like to try new things, even if they push me outside of my comfort zone”; “I believe science can explain most of the mysteries of the universe”; “I’m constantly trying to improve/evolve as a person”; “I like learning about and sharing bits of trivia”; “I love exploring new culture and arts events”

#### The Type of Statement You Might Hear from a Voracious Voyager

- ≡ “I can’t wait to travel the world.”
- ≡ “I want to love my work and be financially stable.”
- ≡ “I love to get out of the house and meet up with my friends or check out a new band.”
- ≡ “I keep several web browsers open at work.”

Two additional segments emerge that represent a lesser opportunity for NPR. While a portion of these groups do or would listen to NPR, their media profiles and news appetites suggest that they place less importance on news media, particularly national and world news, in their daily lives. While some members of these segments may consume public radio as they come across it, these groups are likely to display a lower return on investment. Their descriptions follow.

#### **Low-Opportunity Segment 1: Strugglers**

Strugglers are, as their name suggests, struggling to maintain their optimism; they feel a bit defeated by and disengaged from life. They don’t see themselves as leaders, and they express lower degrees of hope and excitement for their future. More than any other group, Strugglers feel financially strapped than others (more than half have a household income less than \$50,000), and there’s never enough money to do all the things they wish they could do. Still, they feel a strong



loyalty to their families, and they try to make time for fun. But media isn't really their thing; only the Traditionalists listen to NPR on the radio less often.

**NPR growth opportunity: More than 4 out of 5 Strugglers don't listen to NPR on a weekly basis.** This segment may follow along and listen to public radio for the universals that appeal to listeners in general, but as low-investment media consumers, they are not a key target audience.

#### Strugglers by the numbers

- ≡ 19% of national sample
- ≡ 51% male
- ≡ 34% age 50-64
- ≡ 77% white (most of any segment)
- ≡ 13% weekly consumption of NPR on public radio
- ≡ 31% self-identify as liberal, 31% self-identify as conservative
- ≡ 28% self-identify as Democrat, 19% self-identify as Republican

#### Struggler value mottos

- ≡ "It seems like I never have enough money to do the things I want in life."
- ≡ "Spending time with my family is important to me."
- ≡ "Most Americans focus too much on pop culture and not enough on their own lives and problems."
- ≡ "Education is important to me."
- ≡ Low index on: "I'm very optimistic about my future"; "I believe I can make the world a better place"; "I see the best in people"; "Others consider me a leader"

#### **Low-Opportunity Segment 2: Traditionalists**

Traditionalists stick close to family and home, though that sense of home extends to their community. Skewing older and female, this group is generally happy and optimistic. Traditionalists often throw themselves into volunteer and community leadership roles and express a strong affinity for helping others - even if they don't believe that others see them as leaders. They're behind the curve technologically, even if they do try to embrace new technology. Traditionalists play by the rules and are far more religious and conservative than the national sample. They tend to get their news from television - just 1 in 10 listen to NPR on the radio weekly.

**NPR growth opportunity:** This group may join public radio on occasion, especially for locally-focused content and community-related news and information in smaller markets. But with a low level of radio consumption and lesser appetite for national or world news, this group is not a key target for NPR.



### Traditionalists by the numbers

- ≡ 20% of national sample
- ≡ 73% female
- ≡ 23% age 55-64
- ≡ 75% white
- ≡ 10% weekly consumption of NPR on public radio
- ≡ 16% self-identify as liberal, 53% self-identify as conservative
- ≡ 39% self-identify as Democrat, 18% self-identify as Republican

### Traditionalist value mottos

- ≡ “Spending time with my family is important to me.”
- ≡ “I believe there’s something out there that’s bigger than all of us.”
- ≡ “Helping others is important to me.”
- ≡ “Education is important to me.”
- ≡ High index on: volunteering and community leadership – though this is not universal to this group
- ≡ Low index on: “My friends usually ask me for advice on new technology products”; all cultural leadership statements.

## **Diverse Audiences as a Growth Opportunity**

This research endorses NPR’s organizational imperative of reflecting the news preferences not only of the current core NPR audience, but of the wide spectrum of demographic groups across the U.S. In fact, African-American and Hispanic news consumers are just as likely to embrace public radio as their Caucasian counterparts. However, adoption hurdles have less to do with ethnicity and more to do with awareness and program tone. Ethnically diverse audiences are actually *more positive* about NPR’s current diversity efforts than are Caucasian audiences: only 13% of the ethnic minority target audience feels that NPR “lacks diversity,” compared to 17% of Caucasian target listeners. Among ethnic minorities who don’t listen to NPR, the greatest hurdle to adoption is familiarity (34% aren’t familiar enough to have a reason to listen); only 10% believe that NPR is “too white” to capture their loyalty.

Examining these perceptions, we find that there are more universals than differentiators among the various audiences. Ethnic minority audiences want to be included, but they don’t see “ethnic” programming as a solution. They want an invitation to the party, not a different party.

- ≡ The obstacles to acceptance among ethnic minorities are similar to those of both younger listeners and “lookalike” audiences: a desire for a lighter, more conversational tone, for more multiplatform access, and in particular for a greater integration of music into the programming.



- ≡ Intelligent dialogue and insight is valuable across the board. Fun, upbeat programming on-air is particularly important to 18-44s, but while humor and entertainment programming can bring younger listeners into the room, they still name as their highest priorities key NPR assets like intelligent insights, good questions, and good dialogue.
- ≡ Breaking world and national news from a balanced perspective is age and ethnicity agnostic; this is important to everyone.

Interestingly, a handful of more nuanced attitudinal differences do surface among the African-American target audience:

- ≡ Certain sensibility differences relate more to spirituality than to racial heritage per se. For example, African-American audiences are more likely to be religious, and more likely to adopt a literal interpretation of the Bible. It is critical to note that a dismissive attitude toward religion and spirituality is likely to alienate a portion of this audience.
- ≡ African-American audiences also place a greater importance on local programming, presenting a key opportunity for collaboration with local stations in metropolitan areas with a higher presence of African-American audiences.

There are also generational differences in how consumers adopt media, and these differences impact the future of public radio – not just with regard to who is listening today, but in how we reach and appeal to tomorrow’s public radio loyalists and donors.

- ≡ Terrestrial radio is more important to ages 35+, while the Internet is slightly more important to 18-34s. We expect this generational difference in platform preference to continue over time.
- ≡ Mobile applications have become more commonplace with a younger demographic, and mobile tools such as music, photos, video, etc., will resonate more with 18-24s and potentially be a significant loyalty driver.
- ≡ Topical content interest varies with age, underscoring the need for easy and intuitive navigation on public radio websites.
- ≡ Generally speaking, music is more important to 18-34s (especially 18-24s) and a potentially vital point of entry.

### **Public Radio’s Key Growth Opportunity: Accessibility**

Interestingly, no single demographic group or segment emerges as an exclusive future opportunity or a previously missed opportunity for public radio. Rather, public radio’s growth opportunity is more deeply rooted in the notion of “accessibility,” a critical consideration that impacts a wide range of demographic and psychographic audience targets. We see this accessibility as taking three key forms:

- ≡ *Brand accessibility*: NPR’s greatest challenge is not so much a perception of a lack of diversity as it is a broader-based audience perception that NPR is “not for them” and/or not



- for “Average Americans.” NPR is widely seen as smart, informed, and intelligent, but also often elitist, too serious, or pretentious.
- ≡ *Content accessibility*: The tone of NPR programming is widely seen as lacking energy and variety of cadence, underscoring a need for a more upbeat, conversational, and when appropriate, a more urgent but not frenzied presentation.
  - ≡ *Physical accessibility*: One in four core listeners say that NPR is “difficult to fit into their day.” Further, 41% of this audience uses terrestrial radio daily for news and information, compared to 74% using the web on a daily basis. These trends underscore the importance of digital platforms for fostering growth and reinforcing loyalty.

Interestingly, these three pillars of accessibility are relevant to core and non-listeners alike. That is, core listeners recognize and acknowledge these accessibility barriers. Addressing these considerations – without losing sight of the core assets of NPR - will actually serve to improve core listeners’ opinion of NPR.

### **Brand accessibility**

Both core and prospective listeners see the brand image of NPR as being politically-minded, intelligent, and informative/educational. But NPR also receives significant negative associations among core audiences and prospects alike (and across all key segments):

- ≡ 30% of those familiar with NPR say it “takes itself too seriously” (including 24% of core NPR listeners)
- ≡ 27% call it “elitist”
- ≡ 18% call it “too pretentious”

Thus the greatest challenge we see for NPR is its lack of accessibility; many audience members consider NPR to be for someone else – for “the intelligentsia,” for people older than them, for people more liberal than them – but not for the average American. It’s seen as smart – but stodgy. The challenge, then, is to preserve the former while shedding the latter.

### **Promoting brand accessibility**

- ≡ *Balancing intelligence and thought with engagement*: The four top attributes for NPR among those familiar are “informative,” “intelligent,” “thoughtful,” and “insightful.” Any discussion of the brand should continue to touch on these elements – without coming off as elitist or self-serious. Both current and target audiences often believe that Discovery Channel offers a good model or metaphor in this regard, with broadly relevant, credible, and informative entertainment that is still fun and compelling.
- ≡ *Taking greater ownership of the brand image*: It’s important for NPR to own and define its image more clearly, relying on listeners to evangelize not simply what they think of NPR, but what NPR thinks of NPR. As noted above, listeners and non-listeners alike have defined NPR as smart but elitist. Any attempt to make NPR more accessible must include an effort to mitigate these negatives through marketing and close the gap between internal intent and external perception.



- ≡ *Using the web*: NPR already uses social media proactively as a way of sharing content. A next stage can further leverage NPR's success on Facebook and Twitter to consider how that same strategy can be used to generate awareness and control brand parameters.

### **Content accessibility**

A second aspect of accessibility relates to content, and especially the tone of programming. Again, certain negative attributes stick to NPR programming across multiple audience segments:

- ≡ 35% of those familiar with NPR say it "needs more energy" (including 29% of core listeners)
- ≡ 30% say it "is too monotone"
- ≡ 28% call it "boring"

Thus we see a key opportunity to expand NPR's audience by heightening the sense of energy within the programming to reflect the broader personality of America and mitigate this sense of elitism and inaccessibility. Another key opportunity lies in taking greater ownership of breaking news and updated headlines as a complement to in-depth reporting. This quality is a historical cost of entry in news delivery – updated headlines and breaking news updates are a key tune-in driver on all platforms, including web and mobile.

### **Promoting content accessibility**

- ≡ *Tone*: NPR can at times be more conversational, steering clear of the "news reader" voices that reinforces a sense of self-seriousness. The tone needn't be frantic to be approachable – just more open and dynamic, and less monotone.
- ≡ *Humor and lightness*: NPR programming is and should be serious when it matters – but it can be lighthearted when it doesn't. Audiences generally see a sense of humor as an asset, even within the news.
- ≡ *Urgency*: A cost of entry to news reporting is breaking news and frequently updated headlines; this should be particularly showcased on web and mobile platforms.
- ≡ *Balance*: Showcasing a range of perspectives is an important news value, and also efficient to time-starved listeners.
- ≡ *Family emphasis*: Every segment lists family as a key personal value, and greater personal relevance can be achieved by more regularly introducing this prism of family into program content. (Also consider that "family" for many extends to the local community – people value news that hits home, literally and figuratively.)
- ≡ *Hope/optimism*: Key segments express optimism, enthusiasm, and excitement for the future, especially among the younger members. To engage these individuals, programming should solution-oriented. NPR can continue to differentiate itself with non-sensationalist news that empowers listeners.



### **Physical accessibility**

The final component of accessibility is the physical access to NPR. As noted above, one in four NPR core listeners (and 32% of all those familiar with NPR) say that NPR is “difficult to fit into their day.” NPR’s web and mobile presence can provide a mechanism for accessing public radio content with greater convenience, especially given that intent-to-consume NPR is nearly as high online as it is on-air.

### **Promoting physical accessibility**

- ≡ Public radio must go where the listeners are. This means continuing with – and doubling down on – efforts to reach out online, via mobile, via social networking (Facebook in particular), and of course on terrestrial radio. Traditional over-the-airwaves radio is still the core of the NPR brand and the organization’s grounding platform, but the concept of “radio” is no longer limited to this terrestrial radio platform; radio can be online and on mobile in consumers’ minds. Some listeners have found us across platforms, but it is critical to get the word out.

## **How Media Attitudes Impact Growth**

NPR (and public radio on the whole) operates in a highly competitive media space - the majority of these consumers use TV, web, and radio on a daily basis. In this crowded media environment, a notable opportunity exists to raise NPR’s profile and grow the public radio audience. Only 3 in 10 target listeners in the national sample express clear familiarity with NPR; another 4 in 10 are just somewhat familiar, and the remaining 3 in 10 are completely unfamiliar.

To core audiences, a positive key differentiator of NPR in this cluttered media environment is NPR’s long-form linear news style. Many note that the “calm” nature of NPR is precisely what they like about it. While the long-form stories can be credited with creating iconic “driveway” moments, they can also create a sense that listeners are missing out on the big stories of the day. For some, this doesn’t reduce their reliance on NPR, it merely introduces competitive news sources into their media mix. For others, it’s a reason to listen to NPR only when they have the time.

Thus, while it’s important to maintain and communicate NPR’s uniqueness and differentiation, it’s equally important to deliver upon the cost-of-entry expectations that news consumers have of any news media outlet. This research identifies four key universal media attitudes that are imperative to integrate into and reinforce within news and talk programming:

1. The Internet has also changed the expectation of news delivery and consumption. In this new digital environment, breaking news and updated headlines are a baseline expectation across all platforms. While long-form programming is still a value-add differentiator for public radio, it must coexist in a news environment where urgency and updating of new information is expected.



2. Audiences want a range of perspectives and are using a wide array of news and information sources, across a breadth of different platforms, to access that range. This presents a key opportunity for NPR to reinforce its position as a place to hear all sides of a story.
3. Similarly, audiences seek a balanced perspective from news reporting. Target listeners place a high value on editorial balance within a single media outlet, and they differentiate between “balance” and “lack of bias.” “Balance” is the greater expectation in news reporting, as target listeners tend to believe that people (including reporters) have inherent biases, thus it’s important to balance that bias with multiple perspectives. While no single news personality stands out as “completely” for all of these consumers, Anderson Cooper, Matt Lauer, and Brian Williams are the most broadly relevant news personalities to these target audience members.
4. News can be credible while introducing a more conversational tone. Conversation can, in fact, add to the desired balance of perspectives. It’s also important to note that core listeners agree with this perspective and believe that NPR can remain calming while becoming more conversational.

### **Differences among the segments**

**Dutiful Aggregators**, **Team Captains**, and **Voracious Voyagers** are the heaviest consumers of media among the five identified segments, and they also express the greatest interest in NPR. But these three key segments already have a large consideration set when it comes to news and discussion programming.

- ≡ While Dutiful Aggregators are often core listeners of NPR, their bandwidth is stretched – the majority of them also consume a dozen other types of media on a weekly basis.
- ≡ Team Captains and Voracious Voyagers use slightly fewer resources but turn very heavily to TV, local news (on TV or in a newspaper), and web portals.

From our ethnographic research, it appears that Dutiful Aggregators seek out NPR because it plays an important role in helping them understand their world, making it a key part of their news and educational diet. For Voracious Voyagers and Team Captains, NPR provides more depth of perspective and fun information (through entertainment programming) when they have the time to commit to it.

Editorial balance also presents a key area of opportunity and reinforcement for the three key segments, and especially for Team Captains: The top news attitude among Team Captains is “I turn to news outlets that report all sides of a story.” Voracious Voyagers share this emphasis (albeit to a lesser degree). For these key segments, efficiency is key – there is value in getting multiple sides from one news source. It becomes critical, then, for NPR to focus on this kind of balance – not only in editorial content (featuring multiple reasoned and articulate voices from across the spectrum of ideas), but also in the way NPR talks about and markets itself.



## Multiplatform Strategy as a Mechanism for Growth

As noted earlier, public radio operates in a highly competitive cross-platform media environment in which expectations are not limited to the norms of over-the-airwaves radio. Further, news media has become dominated by television and web outlets; web news far outperforms radio in daily and weekly reach, regardless of age or gender.

This evolution nonetheless offers an opportunity for NPR. Today's news and information consumers express nearly equal intent to visit NPR online as to listen to NPR on the air: 57% say they intend to visit NPR.org in the future, while 61% intend to listen to NPR over the airwaves. While this intent is not yet matched by behavior, it speaks to the appetite that consumers express for multi-platform access to public radio. While on-air radio continues to generate longer consumption duration, the trends identified in this research underscore public radio's opportunity to reach new consumers and reinforce its strength with current listeners through a multi-platform presence. Message board forum and ethnography feedback echoes this sentiment, with a number of participants indicating that they'd never heard of NPR.org or the NPR Facebook page, but expressing interest in one or both of these alternatives.

A well conceived web and mobile strategy is particularly imperative to a younger demographic: younger target listeners (ages 18-34) are just as likely to express intent to visit NPR online as they are to listen on-air. This younger demographic might initially discover public radio through alternative platforms, and this age group tends to assume that any media brand they consume will offer comprehensive multi-platform access.

### Multiplatform Opportunities Requiring Action

Key universal considerations derived from this research with regard to multiplatform strategy include the following:

- ≡ Breaking news with frequent updates is critical. NPR listeners value its depth, but without late-breaking news, multiple headlines, and frequent updates, it is impossible to compete on the web and, in particular, on mobile devices. This need is universal – it is agnostic with regard to segment, core/non-core listenership, ethnicity, and age.
- ≡ Local participation and content – in the form of mobile apps, web widgets, etc. – is similarly imperative. Collaborating with stations for local content will be a key part of NPR's multiplatform strategy in order to facilitate public radio growth on a broad scale. Local news competes closely with national news as a key listener interest area, and actually outpaces world news in importance. Ethnographic research suggests that a key



area of NPR's appeal - and one of its strongest differentiators among regular listeners - is its balance of world news with other content. Thus, local news should continue to be a growing part of the mix, but it should not categorically supplant the breadth of world and national news currently offered.

- ≡ Consistent with NPR's previous research and current social media efforts, Facebook is also a key point of entry to NPR both online and on a mobile platform. About half of these target listeners visit Facebook several times a week, and NPR's social networking pages have higher self-reported visitation than does NPR.org itself. Continued efforts in this space are critical not only as a standalone content destination but in supporting necessary promotional efforts to broaden public radio awareness and heighten understanding of the NPR brand.

### **High-Level Conclusions**

As we consider how to prioritize growth opportunities in the public radio landscape, four themes surface as significant considerations:

1. Accessibility – making public radio feel and become accessible from a brand, content, and physical standpoint
2. Awareness – creating greater awareness and depth of familiarity with what public radio has to offer
3. Core News Expectations – delivering seamlessly upon cost-of-entry priorities in today's competitive news landscape
4. Multiplatform Radio – capitalizing on opportunities to convert broadcast equities to a multi-platform presence in today's evolving digital landscape

These four themes, and their significance to key audience segments, will be addressed and documented in further detail in the upcoming September 2010 presentation.