Public Media's Possibility in a Parched News Land

2014 Public Radio Super-Regional Meeting
#PRSR14
Nov. 19, 2014

Ken Doctor
Media Industry Analyst
@kdoctor
Are You Keeping Up With The Changes?
Global Change

Truly, Madly, Deeply
Today
Our News to Me Era
The News Desert
Public Media’s Role
7 Lessons From The Digital Front
It’s the News to Me Era
News Dictators

Centralization, Limited Choice

Copyright, Content Bridges/Newsonomics, 201
Empowered Readers
The News is Personal
Our Apps,
Ourselves
Five Screens

Desktop/Laptop

Smartphone

Tablet

TV

The Car
Another?
Desktop is the New Print

Desktop Minutes Are Decreasing

Majority Mobile is Upon Us
44 Hours a Week

1975: 16 Hours
2018: 55 Hours
Teenagers: 70 Hours

“If we factor in sleep, it’s over a third of all awake time.”
Dr. Jeffrey Cole, USC
All Access is Business Model
National News Growth
Politico Redesign

And Going Global
Ezra Klein

From WashPost to Vox
The Vox Network
## Native Digital News Organizations Grow Their Staff

<table>
<thead>
<tr>
<th>Digital News Organization</th>
<th>Number of Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vice</td>
<td>1,100</td>
</tr>
<tr>
<td>Huffington Post</td>
<td>575</td>
</tr>
<tr>
<td>Politico</td>
<td>186</td>
</tr>
<tr>
<td>BuzzFeed</td>
<td>170</td>
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<tr>
<td>Bleacher Report</td>
<td>140</td>
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<tr>
<td>Gawker</td>
<td>132</td>
</tr>
<tr>
<td>Mashable</td>
<td>70</td>
</tr>
<tr>
<td>Business Insider</td>
<td>70</td>
</tr>
</tbody>
</table>

Who’s Hiring
Andreessen Manifesto

10-100X Growth
$42B Digital Ad Business

2012 vs. 2013, in billions

$36.57

17.0%

$42.78

Annual revenues for 2013 totaled $42.8 billion, $6.2 billion (or 17.0%) higher than in 2012.
Digital Dominates Legacy

![Bar chart showing advertising revenue market share by media in 2013 (in billions)]

- Internet: $42.8 billion
- Broadcast Television: $40.1 billion
- Cable Television: $34.4 billion
- Newspaper: $18.0 billion
- Radio: $16.7 billion
- Magazine (Consumer): $13.4 billion
- Out of Home: $7.9 billion
- Video Game: $0.9 billion
- Cinema: $0.8 billion

Sources: IAB/PwC Internet Ad Revenue Report, 2013; PwC
The Big Picture

Newspapers:

Magazines:

Broadcast:

Cable:

Digital:
Billionaire Bingo
The New Strategist
What Does Bezos See?
Rebuilding a Premium, Respected Business, on the Foundation of What It Is
What Might Bezos Do

Mass Customization for Hundreds of Thousands of Paying C
The Local News Drought
The Big Numbers

8000 Jobs Gained

20,000 U.S. Jobs Lost
Mercury News

435

100
Raleigh

260

80
Saint Paul

235

85
Advance: Digital First Shock
Now 3 Days a Week, Reinforcing Sunday
Concerned Reader
New Orleans
Gatehouse Newspapers
No Raises Since 2007
The Register’s New Low

An Orange County Register staffer writes: “All associates (newsroom included) are asked to deliver the newspaper because they can’t find enough drivers following the catastrophic move away from their deal with LA Times. Those of us who agree to wake up at 4 a.m. to deliver 600 papers will get $150 Visa Gift cards. Sad thing is that many of our young reporters who make peanuts are actually signing up to make some extra cash.”

Thanks for offering to help with Sunday deliveries

Our contracted delivery vendor ACI is reaching out to associates who are willing to support deliveries of the Sunday edition of the Orange County Register during the next few weeks. Thanksgiving mornings in routes that still do not have permanent drivers, as needed.

As part of the We Care initiative, you will receive up to $150 in Visa gift cards for supporting this effort, depending on the size of the route (which is based on the number of papers you can transport in your car).

A full route – which averages about 100-150 newspapers – earns $150 in Visa gift cards. A smaller route will earn $150 Visa gift cards. As a novice, sorting papers and delivering a route typically requires between 3-6 hours to complete, depending on the route and number of papers you are transporting.

If you are available to support this effort, please select from the delivery site options listed below. Upon submitting, you have RIY to report to the warehouse facility at 1900 E. Hunter in Anaheim at 7 a.m. on Sunday morning. In the morning is OK too, but please designate at the Notes field below.

Larry Blake is Circulator will be your point of contact at the warehouse to give you your card on Sunday morning, and a primer of your route that lists addresses (information).

Bring a companion to help sort papers and navigate the route as the other person drives to facilitate deliveries is encouraged – but not required.

Your support is greatly appreciated. It will ensure missed deliveries and subscriber inquiries are covered.

This company-wide memo was sent by Orange County Register spokesman Eric Morgan:
2015

8-10% Down in Print Ads

More Cutting
What’s Missing?
Original Reporting
Hundreds of Thousands of Stories Not Told
What Don’t We Know?
We Don’t Know
Don’t We Know
Is It Time?
Who is Bridging the Gap?
A Few Good Digital Startups

In Less Than a Dozen Cities
Public Media

In More Than a Dozen Cities
FROM A FATHER AND SON, WHAT IT MEANS TO BE A MILITARY MAN

AUGUST 19, 2011

Military service once defined the lives of many men in the United States, particularly before the end of the draft in 1973. Today, many younger adults have no direct family ties to the military at all.

For the men in Mark and Jeremy Fierman's family, however, military service is a tradition dating back to the Civil War.

"My father always taught growing up that there's service to our community, service to the church and service to the country," says Mark, of Fillmore, Utah, who retired in 2013 after nearly four decades as a Green Beret. Jeremy, his son, is a veteran of the U.S. Army, and Jeremy's brother has also served.

KPRU's Audra Conklin talks with Mark and Jeremy about how military service contributed to their coming of age as men, how service has often been tied to masculinity across the generations — and how that may be changing as the share of women in the military has grown.

Interview Highlights

"BIGGER THAN VEGAS" - PREVIEW
DOC 21, 2011
FRONTLINE Investigates the explosive growth of Macau as the gambling capital of the world...

CHANNELING SPRINGSTEEN: TEACHERS AS PERFORMERS
May 17, 2014
This fall, the NPR Ed team is celebrating great teachers and owning what makes student

National Collaboration

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NEWSONOMICS
Alabama’s prisons are overcrowded, underfunded, and riddled with problems ranging from poor prisoner healthcare to inmate sexual abuse.

This year, WBHM worked with AL.com and The Center for Investigative Reporting to investigate Alabama’s prison system. It’s part of the Alabama Media Group’s Investigative Journalism Lab.

What did the investigation find? And with the threat of a federal takeover on the horizon, what’s next for Alabama’s prisons? Learn more in this video, produced by AL.com.

You can read more about the project on AL.com. Listen to WBHM’s complete prison reporting here.
Local Collaboration
Public Media

1800

Journalists
Is It Enough?
More
Faster
Better
Deeper
Strengths
Trust
Values
Relationship
Gaps
Tech
Capacity
Network
Why Local News?

Offense
Defense

How Can You Be More Essential?
What is Your Place?

Do You Know Your Place?
Do You Know Your Community Better Than Google and Facebook?
How Can You Prove It?
The Challenge of Network
Turf
Control
Quality
Dividing Revenue
Who Needs You to Figure It Out?

Your Communities
Seven Lessons from the Digital Front
1.
On the Internet No One Cares You Are a Non-Profit
2. Curation is the Name of the Game
Good Morning
Good Morning
Good Morning
President Obama called the execution of Mr. Kassig, a 26-year-old aid worker, “an act of pure evil” after it was revealed in a video on Sunday.

New York Today: Pull Out the Coats
Monday: A coat drive, rain, and the Bergdorf holiday windows are revealed.

Your Monday Briefing
7:17 AM PST | What you need to know to start your day.

Get the Briefing by Email
Delivered weekday mornings.

FIRST DRAFT
Today in Politics
The Economist Digital Coffee
Pushy News
Prime Real Estate
CNN Go
Lots of Relational Stories
Becoming a Research Bank
3. Tech & Analytics Become the Center of the Business
Analytics

Moving from Anonymous...
...To Known

Who Readers Are
What They Read
What They Shop For
When, On What

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Reader Info

New Basis of Business, Reconnecting Reading, Commerce
New Wave of “Little Data”
Slide Your Preferences

The Pandora Thumbs-Down

For News
Your Reading Data & The Crowd's

The Quantified (Millennials) Reader

Copyright, Content Bridges/Newsonomics,
Serving Audiences Beyond the Capacity of the Human Brain
What's On Yours?
Analytics - CMS
Messaging - CRM
4

Digital Disruption Eats Middlemen

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Creator to Consumer

The Way of All Media
Phone as Radio
Online Radio Listenership

Percentage of Americans Age 12 or Older Who Listened to Online Radio in Last Week

Digital Encompasses All

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The Question

Where Do You Add Value?
5

No One is Immune

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Newspaper's Big Hope

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When Will Paying Readers Look Like This?
6

Into a World of Relationship

Newsonomics
Mark Thompson

“Working Engagement Curve”

What’s Your ARPU?
Trib Nation

“Membership” Catches On
The Best Defense
Is a Good Offense
And the Battleground is Local
2025: Telling Stories About “Radio”
kdoctor@gmail.com
Twitter: @kdoctor
www.newsonomics.com
Voice to Voice
Google Now. The right information at just the right time.

See helpful cards with information you need throughout your day, before you even ask.

The Google Search App

Restaurant reservations
Be reminded of dinner reservations for the evening.

The Connaught Hotel

Package shipped

Manage your day
Stay on top of what’s happening in your life every day, including what you need to do, where you need to go, and how to get around.

Learn more

Google NOW

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