

What is going on with Podcasting?

Notes on the unfolding of a disruptive technology.

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There is an unusually sharp edge to the discussion about podcasting in the last six months.

I'm sure some of it is due to the outmigration of excellent producers.

Some reflects the continuing decline in quarter hour numbers. Where are those listeners going?

As I started this project I expected to find that public radio listening had taken a pretty hard hit from the new audio options: podcasting, on-demand, expanded streaming. But, when I looked around, I found a different, much more nuanced and, frankly, more stable picture.

Podcasting has captured a "share of ear," but it's a *modest* slice. AQH is down, but losses are also modest.

At the PRPD meeting in Pittsburgh, I heard people talking about podcasting as, maybe, 4 or 5% of total public radio listening. When I asked other research specialists, they came up with numbers in that same range.

But the truth is: we really don't know what's going on. We all sense that mobile audio, especially on demand content, is transforming radio. But our ability to measure the change lags far behind the media adoption curve. Different parts of our legacy and online audience are adopting new habits and interests in ways we can't track.

"Regular radio" has been incredibly durable through wave after wave of disruptive challenges. It still contributes well over 90% of the revenue. But the emergence of non-broadcast audio is making it very difficult for station managers and PDs to separate the realities of change from our collective perceptions and feelings about that change.

So, for all these reasons, I was pleased to have an opportunity to organize a session on "Podcasting" for this Super Regional meeting in San Antonio. At our session Thursday afternoon at 3, I will be joined by Paul Jacobs, VP and General Manager of Jacobs Media; Steve Mulder, Senior Director of Audience Insights at NPR Digital, who probably has the best "inside the system" view of our audience; and Kerri Hoffman, COO of the PRX, where the *Radiotopia's* first "membership campaign" could be closing in on \$1 million in payments and pledges. Each of them will bring a unique set of insights to the discussion of podcasting and audio on demand.

This "briefing paper," is, essentially, my presentation for that session. I'm providing it in advance to free up as much time as possible for discussion. Managers meet only a couple of times each year, and I would like to give you as much time as possible to talk with one another.

A Summary

In what follows, I kept my usual focus on: creating something that you could take back to the station for a staff discussion.

I only focused on one piece of “what should I do?” and that was: how are station PDs thinking about “stand-alone podcasts.”

I tried to stay away from making recommendations and looked for some helpful frameworks.

As always, I ended up with twice as much stuff as I could fit in a session. And I probably left out some important things, especially the application of “jobs to be done,” as applied by Clayton Christensen. I didn’t dig as deeply as I wanted into the generational divisions or the outmigration of producers.

But for this session, here’s what I came up with.

- We may be in a period of inflated expectations with regard to changes in audio use. Even some podcast enthusiasts told me, “the discussion feels like a bubble.”
- Regardless of the talk, we are in a period of exploding audio choice, facilitated by online and mobile technology. The expansion of audio choice is many times larger than the expansion of competitive content that, I think, undermined some of the public TV business model.
- Not only is podcasting growing, it’s in a period of accelerating growth. That growth is likely to be compounded by two upcoming events: the development of an Android equivalent of the iTunes podcast library and improvements in “connected car” audio.
- The Apple “ecosystem” of iPhones and iTunes facilitated a fusion of producer and audience interest that propelled public radio into a dominant position in podcasting.
- For the most part, “successful” podcasts are national podcasts. At least as far as I could find, no locally focused podcast model has yet emerged.
- Station PD interest in podcasting is limited by stations’ emphasis on localism and the role of local news. In the competition for resources, podcasts generally lose out. For that reason, **stand-alone, non-broadcast podcasts are likely to be a complement to a broadcast service rather than a major station enterprise.**

Mental Models and Inflated Expectations

This exploration of podcasting reminded me of the conference discussion I facilitated for PRPD in 2012. In that project we started with a vague working title... I think it was, "The unraveling of the public radio business model."

And we found the business wasn't unraveling, so we changed the title.

This one might have been titled the unraveling of the public radio audience. And, I think Steve Mulder will tell us, that's not exactly what's happening.

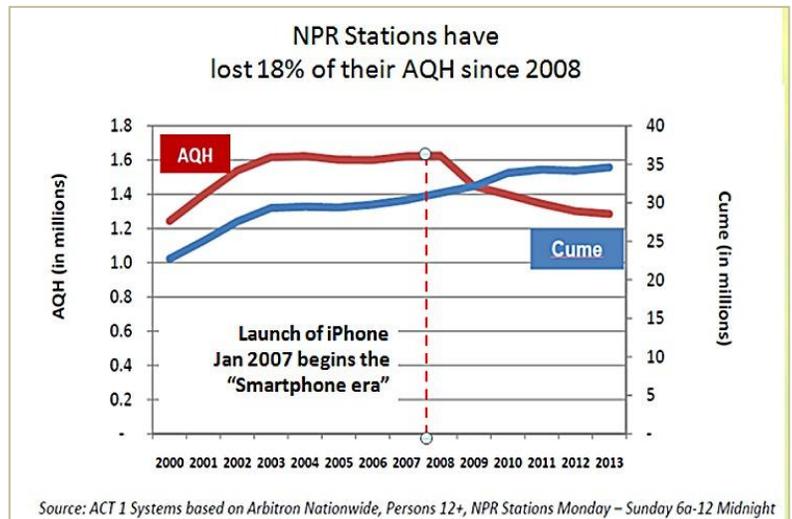
In that PRPD project, we found that total public radio system revenues were at all time highs. (And that has probably continued.) More important, the amount of money stations were investing in programming and production had risen to \$440 million a year—almost double what it was in 2001 (up \$218 million +98%). (Again, that has probably continued.)

Those hard numbers took on additional weight when, last fall, I interviewed 35 station leaders about membership issues. Half way through that series of calls, I started asking one last question: "Would you say that, today, your station is financially stronger than you've ever been?"

Every single person answered "yes."

The audience/podcasting research was not that "counter intuitive." There are signs of unraveling. We can see them in the AQH reports. We are having difficulty attracting the loyalty of younger listeners.

Some of those factors are captured in the graph on the right.



Although there a good part of the downturn in AQH numbers can be attributed to the change in audience measurement methodology, it's hard to ignore the relationship between declining quarter hours and the emergence of the smartphone.

Still, as I noted above, five years after the release of the first iPhone, the many public radio stations remained "financially stronger than they have ever been." And from all that I can see, that strength continues into 2015.

So, I found myself thinking about Amara's Law. This aphorism says "We tend to overestimate the effect of a technology in the short run and underestimate its effect in the long run." As I was reading about Amara's law, I noticed that the Gartner research firm developed a more elaborate version of this premise, which they called the "hype cycle of technology." (I put a graph of Gartner's hype cycle in Appendix 1.)

In Gartner's framework, enthusiasm for a new technology often swells powerfully in an early stage of adoption, creating what Gartner called a "Period of Inflated Expectations." Half the people I interviewed for this session told me, at some point in the conversation, that the volume of talk swirling around podcasting "feels like a bubble." And I should warn people who are really bullish on podcasting that the next stage in the Gartner model is titled, ominously, the "Trough of Disillusionment," a period of consolidation and failure.

I'm not sure that what the evolution of podcasting fits the Gartner's model. But there's a correspondence. The next few years may produce a mix of success and failure, as people keep looking for "the next Serial." Some of the failures will dampen the frenzy.

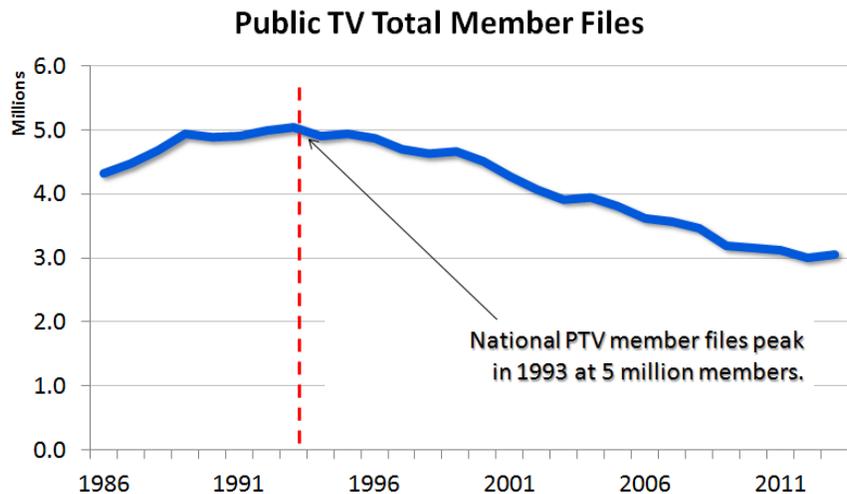
My sense is: public radio managers would do well to pay very close attentive to the second part of Amara's Law. It's the long term impact that will be the most disruptive.

The Transformation Next Door

Public media, writ large, has already been disrupted. Our colleagues in public television can tell us plenty about

"transformational change." They had to endure a journey from broadcast to cable, to digital cable and satellite, then to TiVo, Hulu, Roku and Netflix.

I think we should notice: they survived. But they were "disrupted," and the effect of that disruption was greater than many of us appreciate. From 2001 to 2012, as public radio investment in programming was almost doubling, annual public television investment in programming (measured at the station level) was contracting by 33% (down \$394 million from \$1.174 billion in 2001 to \$780 million).¹ Can you imagine impact of losing \$400 million a year in content creation?



Sources: CPB Annual Financial Reports and *Current*, March 26, 2001
David Waterman, Ryland Sherman and SungWook Ji, *The Economics of Online Television: Revenue models, Aggregation and 'TV Everywhere,'* August 2012

The part of the public television disruption that I have been thinking about showed up as I was developing my 2014 session on "the future of membership."

I came up with the graph you see, on the right.² It shows total television membership from 1986 thorough 2012, with an inflection point in coming 1994. That inflection point marks the start

¹ From Annual Financial Reports submitted to CPB.

² data from Annual Financial Reports submitted to CPB and "Pledge woes and membership slide on agenda for next PBS Summit," Steve Beherens, *Current*, March 2001, <http://current.org/files/archive-site/funding/funding0106member.html>

“the 500 channel universe,” ushered in through digital cable TV. Since then, PTV membership files have dropped from around 5 million members to around 3 million. That’s a big loss. That would be catastrophic for public radio.

When I present that slide I sometimes ask managers to help me understand what happened. Why did the membership files peak in 1994? (To this day, I still don’t fully understand it.) My hypothesis is: The economics of *digital cable* TV changed the competitive landscape. Commercial companies began exploiting content verticals that were, previously, uneconomical. Some of these verticals were things like cooking shows and “This Old House.”

What I know for certain is that in 1994, E. W. Scripps, Inc., in partnership with other media companies, launched the Food Network and Home and Garden Television.

I thought about that in July, when I read that E. W. Scripps had purchased Midroll Media, the podcast network that distributes *WTF with Marc Maron*. I think Scripps could see that the type of change that surfaced in cable in 1994 is surfacing in mobile audio in 2015. You had:

- A new distribution platform reaching a "large enough" and growing audience;
- The capacity to produce large volumes of content inexpensively. (A lot of podcasting is "talk," conversations, interviews, round table discussions. And talk really is cheap.);
- Easy ad insertion with targeting for geographic and demographic segmentation; and
- Scripps brought their experienced ad sales team to sell spots across an expanding range of niche media channels.

A story about the Midroll purchase ran in *The Hollywood Reporter*. It quotes chief digital officer Adam Symson saying, "Scripps has had a history of always evolving to stay in the front of the media business... When I look at where podcasting and streaming audio is today, it's obvious that this is a platform that's going to be really critical and important for the future of media. We're planting a huge flag in this ecosystem, and we're really excited about what the future will hold."³

Scripps is getting their ducks lined up for the next wave of disruptive technology. Are we?

The Explosion of Audio Content

Depending on your perspective, transformative industry disruption can be threatening or exhilarating.

All the major TV networks have experienced steadily declining audience shares for three decades.⁴ (But they’re still enormously profitable.) The expansion of viewing options is bad for stations, but good for viewers. It’s been a boon for some creative producers. This is the "Platinum Age of Television,"⁵ with "400 original scripted English-language series — just in prime time..."⁶

³ <http://www.hollywoodreporter.com/news/ew-scripps-acquires-podcast-network-810326>

⁴ Chart reproduced from <http://thefutureofpublishing.com/industries/the-future-of-television/>. Data from Nielsen ratings.

⁵ <http://www.hollywoodreporter.com/bastard-machine/golden-age-tv-best-tv-814146>

⁶ <http://www.npr.org/sections/monkeysee/2015/08/16/432458841/television-2015-is-there-really-too-much-tv>

And that number does not include, "...game shows, reality shows, documentary shows, daytime or nighttime talk shows, news or sports"

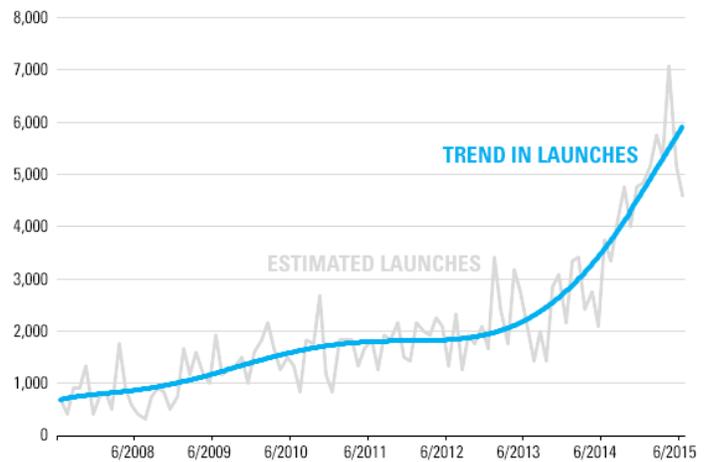
I think it's reasonable to assume that something like that is happening and will continue to expand in audio, with even a greater volume of content.

The Tune In app on my iPhone can serve up 100,000 radio streams and 5.1 million podcasts. Compare that to the audio universe in 1994 which for me, consisted of, maybe, 30 local stations, a CD player and a walkman.

A look at the iTunes library

A big part of the expanding set of options is podcasting. The world of podcasting has been dominated by Apple, since the launch of the iTunes podcast library in June 2005. So the deepest look at the podcast universe comes from a fascinating study of the iTunes podcast library titled, "How podcasts have changed in Ten Years: By the Numbers," published at Medium.com in September 2015⁷ by sociologist Josh Morgan. Morgan found that as of June 2015, there were 206,000 podcasts. About 40% (60,000) were active in any given month.

Podcasts Launched Monthly on iTunes US, June 2007 – June 2015



Josh Morgan (@PluralofYou). Source: "Podcasts on iTunes", a.k.a. iTunes US Podcast Directory. Retrieved July–August 2015. Full article at <http://goo.gl/P55oI7>

As important, the *rate of podcast launches*, shown in the chart above, right, displays the "hockey stick" shape of accelerating technology adoption, with an inflection point in 2013, then the curve turns up steeply with the explosion of interest generated by *Serial* (in the fall of 2014) and Marc Maron's historic interview with President Obama in June 2015. According to Morgan, when Obama sat down in Maron's garage in northeast Los Angeles⁸ podcasters were launching an average of 5,000 new podcasts each month in iTunes, just in the US.

In what I see as a wake-up call for public radio PDs, Morgan found that *the fastest growing category* in iTunes podcasting is now "News and Politics" with 3,700 podcast launches from June 2014 to June 2015.

Going back to 1994 in TV: this is low cost competition emerging for a key public media content vertical.

The overall category distribution of the iTunes library (chart on the next page) says something about role of the amateurs in podcasting. Early discussions of podcasting talked about it as a new form of blogging, and it does look like that.

The largest category in the iTunes podcast library is Christianity (39,300 podcasts). Music is second (33,600). Comedy third (14,200). Every self-help author, every comedian, everyone

⁷ <https://medium.com/@slowerdawn/how-podcasts-have-changed-in-ten-years-by-the-numbers-720a6e984e4e#ek79ivvol>

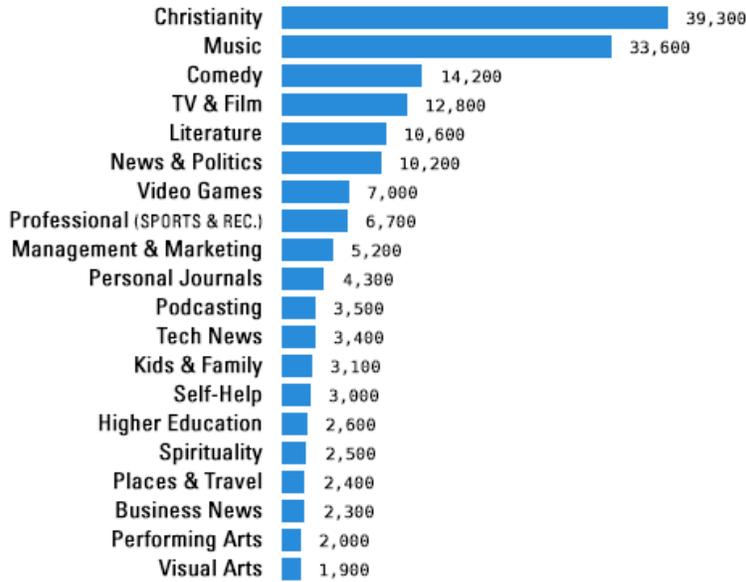
⁸ http://www.wtfpod.com/podcast/episodes/episode_613_-_president_barack_obama

who puts on a finance seminar, every marketing consultant has a podcast. Most of the podcasts are produced on the cheap.

Sustainable, professional, high-quality podcasts is another issue entirely.

The 20 Categories on iTunes US with the Most Podcasts

Rounded directory counts as of June 2015, duplicate listings removed



Josh Morgan (@PluralofYou). Source: "Podcasts on iTunes", a.k.a. iTunes US Podcast Directory. Retrieved July–August 2015. Full article at <http://goo.gl/P55o17>

Over and over I heard that "only about 1% of podcasts make any money." I'm not sure if people who said this meant, literally "1%" or just "very, very few." If we use Morgan's data as a starting point, the number of profitable or sustainable podcasts would be somewhere between 2,060 (1% of 206,000) and 600 (1% of 60,000 active podcasts in any month). Either number strikes me as way too high. I will return to the issue of sustainable podcasting later.

Although Apple dominated the first decade of podcasting, several specialists I contacted told me the growth of podcasting will accelerate through two

upcoming changes: (1) the development of an Android platform that performs many of the functions iTunes now provides, and (2) improvements and advances in "connected car" audio systems.

For all these reasons, including the accelerating rate of growth, podcasts that target public radio content verticals, the approach of new technical advances that will further accelerate podcast access—I think it is safe to say that we are still in the early days of the podcasting revolution and whatever disruption it delivers is likely to intensify.

iTunes + iPhones + programs = podcasting

It's hard to overstate the role Apple in podcasting. The first explosion of interest comes with the launch of the iTunes library. Two years later, there's a second wave of interest with the launch of the iPhone.

And the relationship between the iPhone, podcasting and public radio is very powerful. Public radio listeners love iPhones, much more than Android phones. Through iPhones they gained early and easy access to podcasts. Some other pieces in this mosaic of shared interest are:

- (1) Public radio stations and producers were "first in the pool," seizing early podcast opportunities. (See Appendix 2 for some of the history of podcasting.)
- (2) Public radio continues to feature and support discrete stand-alone, hour and half-hour shows, a type of content that is very well-suited for podcasting. This form of radio programming was largely abandoned by commercial radio in the 1980s.
- (3) Podcasting is a perfect format for self-actualization,⁹ and "Actualizers" are one of public radio's two dominant VALS¹⁰ types (along with "Fulfilleds").¹¹
- (4) And, of course, public radio nurtured a cohort of world class producers who specialize in content genres that make great podcasts.

This combination of talent, technology, demographics, and program formatics created a concentration of public radio interest in podcasting that Larry Rosin described in March 2015.¹² Rosin found

- NPR (meaning public radio) is the dominant source of podcasts
- Half of all the people who reported listening to any form of podcast had played an NPR podcast in the last year

Public radio in the legacy/broadcast sense also figured prominently in Rosin's report:

- More than two thirds of NPR podcast listeners said they listen to a public radio station;
- Over half reported using an NPR/public radio website or app;
- 4-in-10 NPR podcast listeners reported that they "donated to their local station in the past year."

Given that perfect match between a listener base, a technology (podcasting) and a group of producers who are churning out a new line of content delivered through a

What should I do about podcasting at my station?

So, on one hand we have this match made in public radio heaven, where audience interest meets great content through graceful technology. And this gives public radio a giant head start in podcasting, as the field begins move into the mainstream.

But nothing is easy in public radio.

Stations, and even NPR itself, now find themselves conflicted about the best way to take advantage of these emerging opportunities. iTunes itself is a platform for disintermediation. You don't need a station to deliver a podcast; it downloads to your phone. And obviously NPR itself, with its strong national brand, large national reach and top-flight producers, is better

⁹ Thank you to Alison Scholly for this observation.

¹⁰ Values Attitudes And Lifestyles, a proprietary research methodology used for psychographic market segmentation in two ground breaking research studies of public radio listeners and listening

¹¹ <http://www.aranet.com/a98/reports/a98-r14.htm>

¹² PowerPoint, "NPR Podcast listening," Edison Research, March 2015

positioned to compete in podcasting than all but a handful of its member stations. One or two of those stations, may even see podcasting as an historic opportunity to compete with NPR.

And let's not forget the producers. Some are jumping for joy at the creative freedom unleashed by podcasting. Some are jumping ship, leaving public radio for what may be better pay, more innovation, and a more promising career path. (See Episode 10 of "The Pub.")

At the station level, however, the value of podcasting completely different.

To understand the station view, we need make sure we are very clear about the terms of our discussion. Lots of radio programming gets converted from broadcast to podcast. Everyone is doing all of that. The difficult decisions come when you shift the focus to *stand-alone podcasts*, that is, to producing audio designed specifically for individual off-air listening.

Most of the PDs I contacted were, at best, ambivalent about that kind of project.

For Tamar Charney in Ann Arbor, it was a question of priorities: "I am most interested in getting multiple platform news content that is *broadcast first*."

Charney's view reflects a very broad consensus that developed in public radio some time in the last half-decade: a vast majority of stations want to "be more local." For news and information stations, this usually means finding money to hire more reporters, building a better website and posting more local news, and sometimes, adding a local talk show.

Public radio listeners really prize the news services. PDs want their stations to be part of an integrated local/national/international news network. In fact, that news function has the most powerful driver of system growth for the last decade.

Local podcasts just can't deliver the same "service return on investment." So in a competition for funds between a broadcast news effort and a stand-alone podcast, the *broadcast* project wins, most of the time.

Consequently, most of the PDs I contacted view podcasting as a **complement** to a broadcast service.

Jeff Hansen in Seattle laid it out in a note he sent me with two clear points:

- *We should balance our time and investment in podcasting so that it is proportional to a realistic understanding of the potential return on the investment for each major content related expense center such as radio programming, podcasting, social media, etc.*
- *Radio listening is still the primary public service and revenue generator. PDs and system leaders have identified many areas in radio programming that could be improved and that are not getting sufficient attention, even as considerable time, money and energy is being diverted to podcasting.*

Moreover: If podcasting does emerge as a serious challenge for public radio, the integrated national news network may be the most defensible franchise in public media. All the other "shows," story-telling, talk shows, entertainment—can be done reasonably well in podcasts. In

contrast to those “feature shows,” the integrated national news franchise has “a wide moat.” It is very expensive to recreate a national news network.

Moreover, the growth of the news sector in public radio came, in part, because station managers were able to engage civic and philanthropic leadership in their news projects. Here again, that local connection is going to remain a powerful force, even if podcasting chips away at quarter hours.

This is one of the most important issues for PDs and GMs to consider. It should be explored using some of the techniques including an analysis of “jobs to be done,” developed by Clayton Christensen’s consulting firm, Innosight.

You can see my first sketch of “jobs to be done” at most news and information stations in Appendix 3.

You can see how some of our best music stations have maintained their relevance by identifying and building on “jobs to be done” in their sector of public broadcasting in Appendix 4.

I thank Alison Scholly, now the Executive Director of Channel X, for pointing me to a fascinating and, I think highly relevant illustration of this technique, found in “N2:Newspaper Next” report prepared by Innosight for the American Newspaper Institute that can be downloaded at

<http://www.americanpressinstitute.org/training-tools/newspaper-next-blueprint-transformation/>

This should be required reading for most GMs and PDs.

Looking for Local Podcasts

Even though podcasting has become more popular, not everyone can take advantage of the boom. Ultra inexpensive podcasts, essentially recorded blogs, can have almost no “listens.” Large scale nationally focused podcasts might be able to land a million dollars in sponsorship. But a locally focused podcast at a mid-sized station is an awkward fit.

Local, digital non-profit news groups are running into the same problem. It just costs a lot to gather and create news. More often than not, the size of the target audience for an independent local news site doesn’t provide the volume of economic activity that can sustain the effort, unless you have a steady stream of major gifts and foundation support. Whereas a well-run radio stations with mix of NPR/PRI/APM and local news often can compete for individual subscriptions, marketing dollars and philanthropic support.

PDs are limiting their down-side financial risk, repurposing broadcast to podcast and launching modest stand-alone podcasts using existing staff. Personnel costs are the big financial issue. Here are three examples:

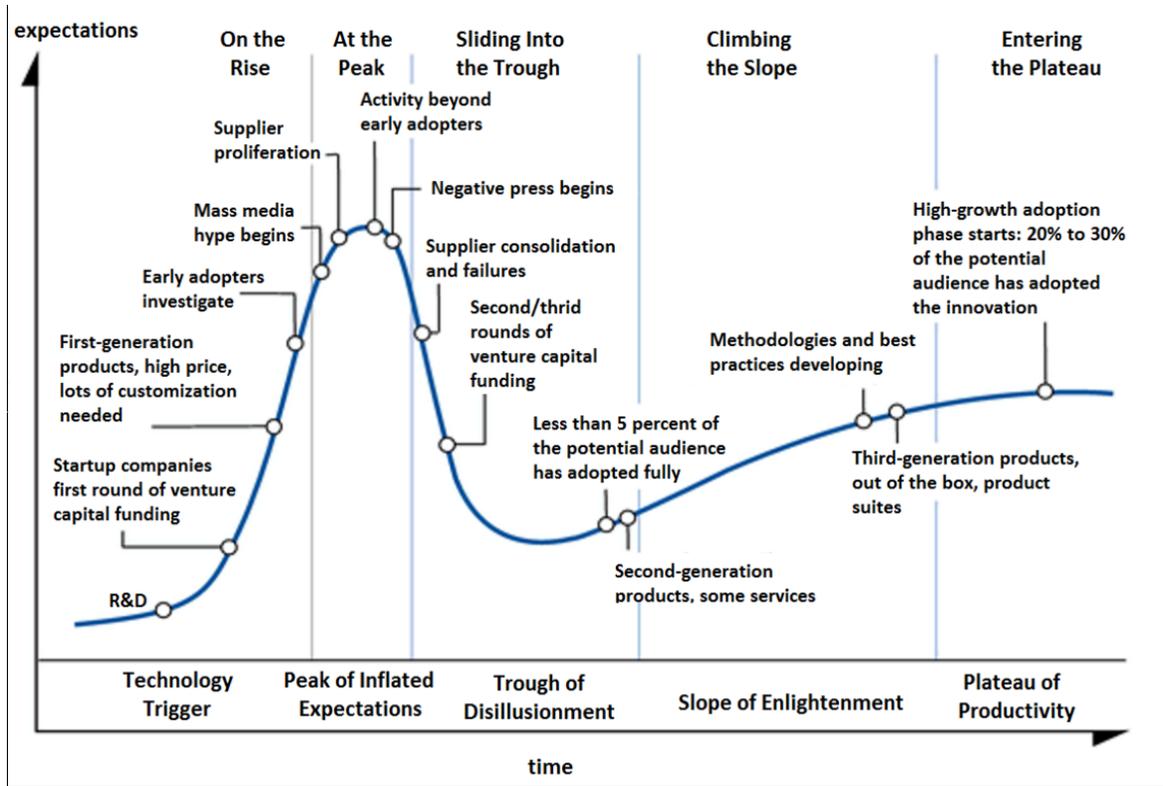
- Each year in San Diego, John Decker and his colleagues set aside \$30,000 for *KPBS Explore*,¹³ a commission fund for independent productions. Until this year, they put the money into TV docs that highlight fascinating aspects of San Diego. The results have been excellent. This year they opened the door to podcasting. This approach puts a cap on their financial risk, but, in our conversation, John acknowledged, he still needs to be very careful about the amount of time required to manage these commissions.
- Curious City at WBEZ¹⁴ sends out a variable-length, variable release schedule podcast that extends the content and value that their Localore project has been delivering in Chicago. *Podcasts from the fall 2015 line up of Curious City podcasts from WBEZ*
 - The 'plastic surgeons' on Chicago's payroll
 - Why so many Poles came to Chicago
 - Should Chicago brag about its Polish population
 - Why Chicago suburb names flat out lie about their elevation
 - Alleys and the making of Chicago's shadow city.
 - How strictly does Chicago enforce bike traffic laws?
 - The design of old Wrigley Field Scoreboard
- West Virginia Public Broadcasting is taking the most aggressive approach that I found in my interviews when it comes to locally-focused podcasts. CEO Scott Finn described a three-tiered approach to audio on demand at WVPB¹⁵:
 - (a) Edited segments of programs,
 - (b) Repurposed programs, including a podcast of *Mountain Stage* and a modified, podcast version of “*Inside Appalachia*, stories of our people and how they live today,” and
 - (c) three stand-alone podcasts, not for broadcast, including
 - Us & Them*, a podcast created by Peabody Award-winning producer Trey Kay and funded, in part, by the West Virginia Humanities Council. *Us & Them* aspires to “bridge the divides of the so-called culture wars and find common ground;”
 - The Front Porch*, where Scott himself engages with “some of the region's most interesting thinkers;” and, of one news feature podcast,
 - Blankenship Trial*, that provides expanded coverage for the trial of Massey Energy's former CEO, Don Blankenship, for his role in the Upper Big Branch Mine disaster in 2010. Scott acknowledged: he's not sure how to evaluate the success of these efforts, but he is confident about the overall direction: focus on “sense of place,” and, where possible, use podcasts to expand “high touch” listener engagement, supported by social media and community events.

¹³ <http://www.kpbs.org/tv/kpbs-explore/>

¹⁴ <http://www.wbez.org/series/curious-city>

¹⁵ <http://wvpublic.org/podcast>

Appendix 1: The Gartner Hype Cycle of Technology¹⁶



¹⁶ https://en.wikipedia.org/wiki/Hype_cycle

Appendix 2: Public Radio's Leading Role in the Development of Podcasting

In 2004, Christopher Lydon, a public radio host and journalist in Boston, was the first radio producer to exploit audio distribution via RSS.¹⁷ He was working directly with Dave Winer, a software developer and Berkman Center Fellow, who is widely credited with the "invention of podcasting."

Some people at WNYC believe *One the Media* was the first syndicated show to distribute through podcasting, but I could not confirm this.

What I can confirm is that public radio was right in the mix at the moment that podcasting went "mainstream." The date was June 28, 2005, when Apple launched its podcast library and the podcast-subscription tool in iTunes 4.9. Jake Shapiro, CEO of PRX, sees that data as the start of "the first era in podcasting." [One of three, according to Shapiro.]¹⁸

The new iTunes service was an instant success. It took only two days for Apple to record one million podcast subscriptions,¹⁹ In the press release celebrating this, public radio was already in the mix. Here's a quote from that release:

"iTunes has done what possibly no one else could have accomplished, propelled Podcasting into the mainstream," said Will Lewis, management consultant for KCRW. "Our servers have been swamped with a stratospheric increase in traffic. In fact, downloads have increased tenfold as a result of the iTunes 4.9 launch."

KCRW has always been ahead of the field in new technology. Even today, no one has a better iPad app. But I would argue that one feature that allowed KCRW to seize this moment of opportunity was their block programming. Very few stations have such a large assortment of high-quality, stand-alone "shows."

More generally, the fact that public radio continued to support "checkerboard schedules" with packaged hour and half-hour shows, sometimes produced by world-class talent of the kind we hear in *This American Life* and *Radiolab*, led to public radio's rise to prominence, even dominance, in the first decade of podcasting.

¹⁷ https://en.wikipedia.org/wiki/History_of_podcasting

¹⁸ According to Jake, there have been three eras so far: the second era starts with the introduction of the iPhone in 2007. The third era, which we're in now, starts with the astounding popularity of Serial last fall.

¹⁹ <http://www.apple.com/au/pr/library/2005/06/30iTunes-Podcast-Subscriptions-Top-One-Million-in-First-Two-Days.html>

Appendix 3: Jobs to be Done

Looking at Local Public Radio Stations through the lens of "Jobs to be Done" for local listeners		
Job to be Done	Comment	Defensible/Vulnerable to disruption via podcasting
Report the Day's Events	This part has been driving growth, as newspapers decline and TV news become more partisan	Franchise that is most defensible
Help Me Understand This	This is the Core Value of Public Radio News and Information	All of these "jobs" are clearly subject to disruption from podcasting.
Keep me Company/ Entertain Me	Cuts across genres. Personality is important.	
Tell me a story	A fundamental skill, cuts across disciplines	
Help me Discover or Learn New Things	AAA Music Stations are banking on this	
Connect me/ Act As Convener	Classical and Jazz stations will bank on this	

Appendix 4: Learning from Jobs to Be Done at Music Stations,

The whole controversy over podcasting is besides the point for most public radio *music* stations. Those stations have been facing "transformative disruption" from the likes of Pandora, Spotify and a myriad of other digital music services. And, at least so far, some of the best of these are holding their own. Just last week, the New York Times reported

Internet radio was supposed to squash small FM music stations... Someone forget to tell that to KEXP.²⁰

Classical music is alive and well in public radio, despite the fact that anyone can listen to a million variations of the classical format. How could that be?

The answer is: Stations are focusing key jobs to be done, like music discovery, support for emerging artists, and support for the local musical culture. Here are some examples:

Anyone attending the recent PRPD conference had to be impressed with the discussion of the "Instrument Drive," conducted by WQXR. They collected 3,000 musical instruments that were repaired and distributed to more than 100 public schools in New York City. The new home of KEXP will have "a laundry facility, showers, and storage lockers to make the place more comfortable for touring bands."⁵

The Key, the Argo blog at WXPB, has become a "go to place" of information about local music in Philadelphia.

The KCRW Music Mine was a groundbreaking iPad music app that extended and reinforced the KCRW franchise internationally. When it was reviewed at Gizmodo.com in 2001, the reviewer spoke for hundreds of thousands of music fans when he wrote

*I'll be honest here, I don't have the curiosity or patience to discover new music. Or at least, I don't like to go out of my way to do so... The KCRW app is great because it does so much of the work for me.*²¹

All of these stations are acutely aware of the fact that many music fans now use YouTube to find and listen to new bands. So they combined to launch their own musician-oriented service called Vuhaus.org.

As they add these new features, the best of them remain focused on "jobs" that a best done through broadcast, like "Keep me company/Entertain me." When I recently talked with Bill Lueth, PD at Classical KDFC in San Francisco, I asked him. What are you look for today when you hiring a classical music announcer. He answered immediately, "I look for personality. There's no replacement for that."

²⁰ http://www.nytimes.com/2015/11/09/technology/in-the-stream-of-internet-radio-music-stations-hold-their-own.html?_r=0

²¹ <http://gizmodo.com/5842662/kcrw-music-mine-for-ipad-play-dj-for-the-worlds-best-radio-station>