



# The Growing Strength of Public Media Local Journalism

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## We live in an era of shrinking local journalism capacity.

By now we all know the statistics: Since 2005 more than one in four newspapers—2,500 total—have shuttered in the U.S.<sup>1</sup> Overall employment in the newspaper industry has decreased 70% as total newspaper revenues have dropped 60%. Two out of three counties in the U.S. do not have a daily newspaper, and four million Americans do not have access to any local newspaper.

At the same time, we live in an era of expanding local news experimentation. The number of local journalism collaborations, digital start-ups, and nonprofit newsrooms has grown over the last decade. For instance, between 2018 and 2020, 33 local news organizations in the Institute for Nonprofit News (INN) network launched<sup>2</sup>, and according to a July 2022 report, the total number of local nonprofit organizations in the INN network has doubled since 2017.<sup>3</sup>

And surprisingly, a renewed conversation about public policies to support local journalism is taking hold across the industry. The [Rebuild Local News](#) coalition has been guiding discussions around national legislation like the [Local Journalism Sustainability Act](#). And while national policy efforts have yet to result in change, the tone is substantively different than in years past.

Yet perhaps the biggest development in local journalism expansion and policy has been hiding in plain sight. From our research and practice, the authors of this report have seen firsthand that the growing local journalism strength of public media has often been overlooked in policy and practice discussions aimed at crafting the new future of local news. This isn't due to a lack of growth or experimentation in public media: In many places around the country, strong stations are stepping in to fill the holes left by shrinking daily metro newsrooms by building up their staffs and leaning into new products and platforms. Other stations are partnering with newsrooms in their communities in new and innovative ways that support the overall growth of local news capacity in their regions. And NPR remains a dynamic national news organization with opportunities to deepen collaboration with its local member stations.

We believe public media is suffering in part from a knowledge gap in the national conversations about the future of local news. Indeed, public media's absence in our industry's visions for the future of local news is in many ways understandable. Public media often operates as its own closed universe—with histories, norms, associations, and communities of practice all its own. And while public media insiders have access to data and insights on the system's revenue, audience, and overall growth in local journalism, those data are rarely, if ever, shared outside public media circles.

<sup>1</sup> Penny Abernathy. "The State of Local News," Medill Local News Initiative, Northwestern University, accessed 28 Sept 2022 at: <https://localnewsinitiative.northwestern.edu/projects/state-of-local-news/>

<sup>2</sup> Michele McLellan, Jesse Holcomb, Emily Roseman. "Nonprofit News Fact Sheet: Local news," Institute for Nonprofit News, accessed 22 July 2022 at: <https://inn.org/research-factsheet-local-news/>

<sup>3</sup> Emily Roseman, Michele McLellan, Jesse Holcomb. "INN Index 2022: Enduring in crisis, surging in local communities," Institute for Nonprofit News, accessed on 28 Sept. 2022 at: <https://inn.org/research/inn-index/inn-index-2022/>

As a result, part of what future-of-news discussions have lacked is a rigorous, data-based assessment of the growth in local journalism capacity and service of public broadcasters; and a historical assessment of what has accounted for the successes and struggles of public broadcasting local news that can be learned from and built upon.

This report aims to close that critical gap in collective knowledge about one set of important institutions for rebuilding local news: The public media system, especially the stations associated with National Public Radio. The evolution and increasing strength of some local public broadcasting institutions in providing local journalism deserves a close look, not just to understand the role public broadcasting can play in rebuilding local news, but to draw lessons from a robust and mature media ecosystem that can inform the development of new local media enterprises everywhere.

And while public media has made progress toward addressing the market failures in local journalism, adjustments to public media funding, strategy, and governance are required to truly reach its potential. Those deeper system changes involve building bridges to cultivate broad-based coalitional support for public media amongst philanthropic and industry leaders who understand these institutions' potential, strengths, and weaknesses. That means public media needs to get better at sharing its strengths and confronting its weaknesses, and broadening the "public media" tent. Our hope is that this report contributes to building those bridges.

## Methodology and Approach

We compiled the research for this report with three areas of focus: journalism capacity, sustainability, and reach. First, we characterized *journalism capacity* as the aggregate size of journalism staffs across public broadcasting licensees, correlating staffing size with the ability of a public media licensees to produce journalism. Over the course of 2021 and 2022, we gathered data on journalism capacity from individuals at the Corporation for Public Broadcasting, GBH, and the Station Resource Group to collect information about the number of journalism positions in public media across the country, the number of licensees with at least 15 full-time news positions, and the number of licensees providing local news stories for NPR broadcasts.

Second, we characterized *sustainability* as the current volume and trajectory of key revenue streams flowing to public broadcasting licensees, including business model mix, changes in overall revenue over time, and the dynamics of funding required to maintain licensee operations. Over the course of 2021 and 2022, we gathered data on sustainability from individuals at Blackbaud, the Corporation for Public Broadcasting, Greater Public, National Public Radio, and the Station Resource Group. We gathered data about total revenue for news-focused licensees, revenue streams, trends in individual giving and federal funding, the ownership type of broadcast licenses, and projections about the growth of the public radio donor base. We also produced our own analysis using

Corporation for Public Broadcasting data from the largest 123 news-focused public radio licensees, collected and tracked since 2015 by one of our authors.<sup>4</sup>

Finally, we characterized the *audience reach* of public media as the size and makeup of the audience of public media stations. Over the course of 2021 and 2022, we gathered data on audience reach from individuals at Audience Research Analysis, the Corporation for Public Broadcasting, Greater Public, National Public Radio, Radio Research Consortium, and the Station Resource Group. We compiled data about the total weekly audience for public media licensees, the growth of local and regional news collaborations, the percentage of the population reached by public media, total NPR digital weekly audience reach, website and podcast metrics, demographic breakdowns of listener metrics, station rankings, and listener trends before and during the pandemic. In March 2022, we also conducted an original analysis of 119 public radio licensees' websites to count the number of original newsletters, original news programming, and online story updates.

From these sources, we compiled a unique and multi-faceted dataset which offers the most comprehensive view to date of the size, scale, and scope of public media local journalism.

## Defining Public Media

As befits a complex field in evolution, public media is composed of a diverse set of actors. We define the terms we used to refer to these actors below.

We use the term "licensee" to refer to the organizations or institutions that hold a federal license to broadcast on protected spectrum and that the Corporation for Public Broadcasting (CPB) has approved for annual "community service grants." These licensees can be independent 501c3 organizations or sub-parts of larger institutions like universities. For example, the licensee WAMU in Washington is part of American University; the university holds the public broadcasting license.

The organizations and institutions which hold both public radio and public television broadcast licenses are referred to as "joint licensees."

We also refer to licensees as "public broadcasters."

We use the term "station" to refer to the particular signal that a licensee has the right to broadcast on. Stations are known by their call letters.

We use the terms "public media system," "public media," and "the system" to refer collectively to (a) any organization or institution with a federal license to broadcast on protected radio or television spectrum that has been approved for annual "community service grants" by CPB, (b) the content networks that have developed among these service grantees such as NPR and PRX, and (c) the associated nonprofit organizations that support and advance the work of these grantees and the networks to distribute free content via protected broadcast spectrum.

Much of our data relates to public radio licensees and joint licensees. We collected fewer data related to public television. This is because, in general, public radio licensees and joint licensees have been much more active in expanding into local journalism than their public television counterparts.

<sup>4</sup> Our second author has published other findings from this data set in the Pew Research Center Public Broadcasting Fact Sheet. <https://www.pewresearch.org/journalism/fact-sheet/public-broadcasting/>

# The Origins of Public Broadcasting

Before laying out our core findings, we briefly review the institutional history of public broadcasting in the U.S. American public broadcasting has its roots in the system of educational broadcasting licenses and the set-asides of the broadcasting spectrum that were distributed by the federal government in the early years of radio and television.<sup>5</sup> The Public Broadcasting Act of 1967 created a permanent federal funding mechanism and a network of institutions out of a loose federation of educational broadcasters. They shared a broad-based mission to focus on educational, cultural, and other content not sufficiently provided by market-based players. The Public Broadcasting Act of 1967 reads, in part:

Sec. 396. [47 U.S.C. 396] Corporation for Public Broadcasting

(a) Congressional declaration of policy—The Congress hereby finds and declares that—

- (1) it is in the public interest to encourage the growth and development of public radio and television broadcasting, including the use of such media for instructional, educational, and cultural purposes;
- (2) it is in the public interest to encourage the growth and development of nonbroadcast telecommunications technologies for the delivery of public telecommunications services;
- (3) expansion and development of public telecommunications and of diversity of its programming depend on freedom, imagination, and initiative on both local and national levels;
- (4) the encouragement and support of public telecommunications, while matters of importance for private and local development, are also of appropriate and important concern to the Federal Government;
- (5) it furthers the general welfare to encourage public telecommunications services which will be responsive to the interests of people both in particular localities and throughout the United States, which will constitute an expression of diversity and excellence, and which will constitute a source of alternative telecommunications services for all the citizens of the Nation;
- (6) it is in the public interest to encourage the development of programming that involves creative risks and that addresses the needs of unserved and underserved audiences, particularly children and minorities;
- (7) it is necessary and appropriate for the Federal Government to complement, assist, and support a national policy that will most effectively make public telecommunications services available to all citizens of the United States;
- (8) public television and radio stations and public telecommunications services constitute valuable local community resources for utilizing electronic media to address national concerns and solve local problems through community programs and outreach programs;

<sup>5</sup> Hugh Richard Sloten. "Radio's hidden voice: The origins of public broadcasting in the United States." University of Illinois Press. 2009.

- (9) it is in the public interest for the Federal Government to ensure that all citizens of the United States have access to public telecommunications services through all appropriate available telecommunications distribution technologies; and
- (10) a private corporation should be created to facilitate the development of public telecommunications and to afford maximum protection from extraneous interference and control.<sup>6</sup>

Grasping the scope of public media's evolution requires understanding that local news and information was *not* part of the mission or structure of public broadcasting in its original form. The growing strength of public media local journalism is the result of institutional evolution, the changing nature of market failures in media, and a deepening understanding of what it means to serve "the public" with free media.

Indeed, the original "instructional, educational, and cultural" purposes of public media were not elaborated any further in the Public Broadcasting Act. Nor was the Act's directive to "be responsive to the interests of people both in particular localities and throughout the United States" further elaborated. It has been left up to licensees and public media support organizations to interpret their organizational missions in light of these general principles, and for the Corporation for Public Broadcasting (CPB) as well to shape its funding priorities according to its own interpretation.

Because of its relatively small share of federal funding and its diffuse institutional mandate, the public broadcasting system in the U.S. is generally considered weak compared to other countries' systems of publicly-funded broadcasting. The share of federal funding for public media is much less than in other developed countries, and the system is much more decentralized than the public media sector in other Western democracies.<sup>7</sup>

Even if the total funding for public media in the U.S. is modest by international standards, public media's footprint within the broader U.S. media system is vast. When understood as a media network, public media produces more content and reaches more people than many other forms of media. CPB provides community service grants to 394 "qualified radio organizations" (sometimes referred to as "licensees" or "grantees") that control 1,190 public radio stations; and to 158 "qualified TV organizations" that control 356 public television stations. Unlike many forms of local media in the US which are concentrated in large population centers, rural grantees account for 247 of the 552 total CPB grantees. And by CPB's estimate, the system's network of radio and television signals reach 99% of the U.S. population.<sup>8</sup>

<sup>6</sup> "47 U.S.C. 396 - Corporation for Public Broadcasting," U.S. Government Publishing Office, accessed on 28 Sept. 2022 at: <https://www.govinfo.gov/app/details/USCODE-2011-title47/USCODE-2011-title47-chap5-subchapIII-partIV-subpartd-sec396&collectionCode=USCODE>

<sup>7</sup> Timothy Neff and Victor Pickard. "Raising the Bar for Journalism," Media, Inequality & Change Center, Annenberg School for Communication at the University of Pennsylvania, accessed on 1 Oct. 2022 at: <https://www.asc.upenn.edu/research/centers/media-inequality-and-change-center/publications/images-text>

<sup>8</sup> "About CPB," Corporation for Public Broadcasting, accessed on 28 Sept. 2022 at: <https://www.cpb.org/aboutcpb>



## THE GROWING FINANCIAL STRENGTH OF LOCAL PUBLIC RADIO

The growth of public media is best understood through examining the growing financial strength of the local organizations that own and run public radio signals. This section lays out the key indicators of growing financial strength among local public radio licensees.

### **News-focused public radio licensees have enjoyed stable and growing revenue across the decade.**

According to an analysis performed by one of our authors, total direct revenue for the largest 123 news-focused public radio licensees has grown steadily, from roughly \$678 million in FY2009 to just under \$1 billion in FY2020.<sup>9</sup> More than 40% of FY2020 revenue in this group came from individual giving (a term that combines small and major gifts), while underwriting (the public media form of advertising) accounted for about 23% of revenue that year. These two categories represent the largest streams of revenue for public stations in FY2020.

### **Americans have been giving to public radio in greater numbers in the past decade.**

If we look more broadly at the entire system of public radio stations (including all news, music, and eclectic formatted stations), the donor base and individual giving capacity for public radio stations continues to grow, even in the face of increasing competition for media donations. In FY2020, according to CPB annual financial reports analyzed by the Station Resource Group, individual giving came to nearly \$600 million across the entire set of public radio stations, from a donor base of about 3.5 million. By comparison, in FY2009, the entire set of public radio stations had a base of just 2.5 million donors who provided just under \$400 million.<sup>10</sup>

<sup>9</sup> Analysis performed by Mark Fuerst in Jan. 2022 of 123 public radio licensees.

<sup>10</sup> Data provided by Station Resource Group's Public Radio Overview, Nov. 2021



## **The last five years has seen an increase in giving levels in the public radio donor base.**

Available data suggest that small-level, mid-level, and major-level givers have all increased their support to public radio in the last five years, according to a detailed analysis of giving patterns in 54 public radio stations by Greater Public.<sup>11</sup> Small-level givers are those who donate up to \$249 per year. Mid-level givers are those who donate \$250 to \$999; and, major-level givers are those who give \$1,000 to \$9,999. Greater Public found that the size of each cohort of small-level, mid-level, and major-level givers increased from 2016 to 2020, and the amount that the individuals were giving in each cohort also increased. Relatedly, a 2021 report prepared by Blackbaud's Target Analytics of 63 stations found that the revenue per donor increased from \$150 in 2016 to \$175 in 2020.<sup>12</sup>

## **Public radio has enjoyed an increase in both sustainers (those who give monthly) and major donors over the last five years.**

According to the same detailed analysis of giving patterns in 54 public radio stations performed by Greater Public, the percentage of public radio donors who are sustaining members grew from approximately 500,000 in 2016 to approximately 700,000 in 2020. In 2016, about 20 stations surveyed by Greater Public reported that at least half of their donors were providing support through sustainer programs. By 2020, nearly 40 stations reported that at least half of their givers were sustainers.

These two reports documenting the expansion of sustainer-donors provide additional evidence of increased financial capacity in public media. Sustaining donors renew at much higher rates than single-gift annual donors, and often contribute at higher levels of annual giving. So the growth of sustainers tells us the donor files of public radio licensees are likely to be strong, durable financial assets in the near and medium term.

## **Major giving and planned giving are poised for expansion in public radio.**

The public media support organization Greater Public has been leading an initiative to encourage public radio licensees to expand their major giving and planned giving programs. Amongst the licensee members in their initiative, Greater Public found in April 2021 that medium-performing licensees in the cohort were receiving around \$2 million per year in major gifts, high-performing licensees were receiving \$7.6 million and very high-performing licensees, \$8.4 million. Based on projections of giving capacity in the donor base, Greater Public set expansion expectations of more than double those amounts in the next five years: \$4.7 million for medium-performing licensees and \$19 million for high-performing and very high-performing licensees.<sup>13</sup>

<sup>11</sup> Data provided by Greater Public's Benchmarks for Public Radio Fundraising, July 2021.

<sup>12</sup> Data provided by Blackbaud's Target Analytics, July 2021.

<sup>13</sup> Data provided by Greater Public's Building a Sustainable Major Giving Program, April 2021.

## More growth potential remains across the public radio system.

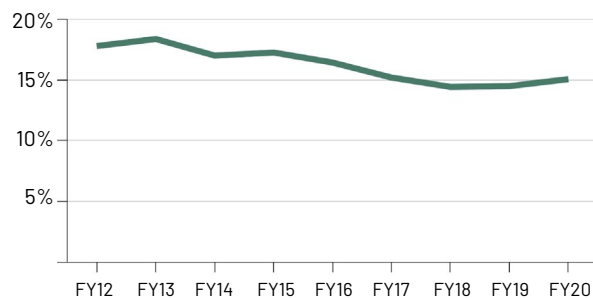
While there is a top tier of very successful news-focused public media licensees, we see an opportunity for more licensees to capitalize on their strong positions in their local markets. For example, of the 123 news-focused public radio licensees analyzed by one of our authors, seven earned revenue of more than \$25 million each in FY2020, with another 15 licensees earning more than \$10 million each. These midsize news-focused licensees have room to grow. Beyond the set of news-focused licensees, there is a long tail of smaller licensees with revenue earnings of less than \$10 million. Most CPB-funded radio licensees fall into this third category, and there is room for growth here too.

## News-focused public radio licensees are supported by a declining share of public funding.

A declining share of public dollars is supporting the public radio system as a whole. According to an analysis performed by one of our authors of the largest 123 news-focused public radio licensees, the share of public dollars supporting these licensees (in the form of CPB funding, state funding, and public institutional funds) has declined as their other revenue streams have expanded. This trend among the largest news-focused licensees, however, does not shed light on the inequalities between station owners. Smaller stations, typically those serving sparsely populated rural areas, are supported by a much larger share of federal dollars than large stations serving populous areas.

### Public Radio Licensees are Supported by a Declining Share of Public Funding<sup>14</sup>

■ % of Total Revenue



<sup>14</sup> Analysis performed by Mark Fuerst in Jan. 2022 of 123 public radio licensees.

## **News-focused public radio licensees are spending more on content than fundraising.**

As revenue has grown in the sector, the data we collected suggest news-focused public radio licensees are spending more resources on producing content and expanding news capacity than on fundraising. In our analysis of 123 news-focused public radio licensees, we found that these licensees spent \$640.2 million directly on content production in FY2020. If we account for the full cost of content production, including promotion and delivery, that figure rises to \$712.4 million or 69% of total revenues. By comparison, the combined cost of fundraising for licensees' "generated income" was \$202.4 million in 2020, representing 19% of total FY2020 revenues. In other words, as revenues in the system have expanded, public radio stations are spending 3.52 times more on content and its delivery than they are spending on fundraising.

# GROWING NEWS CAPACITY: REPORTERS, CONTENT, COLLABORATION

In this section, we gather data from across the public radio system to paint a picture of growing news capacity. The data we gathered clearly show that the number of journalists working in public radio has increased, along with investments in new news formats and new forms of collaboration.

**Increasing numbers of journalists work at a local public broadcasting station.** Despite the significant headwinds facing local journalism in recent years, the number of journalists working in both local public radio and local public television has grown. Drawing from data from the Corporation for Public Broadcasting, our research found that between 2016 and 2021, the number of local journalists in public media grew from 3,694 positions in 2016 to 4,148 positions in 2021. By comparison, between 2016 and 2020, newspaper newsroom employment dropped from 42,450 to 30,820.<sup>15</sup>

**A few public radio stations are growing newsrooms that rival the size of metro daily newspapers.** More than 40 public radio licensees supported at least 15 full-time local reporting positions in FY2020.<sup>16</sup> Of those licensees, more than 10 stations supported at least 40 full-time local reporting positions each. One licensee, WBUR in Boston, was nearing 100 full-time local news positions as of 2020. And in a remarkable advance for the public media industry, Chicago Public Media in Chicago announced in January 2022 that it was acquiring the Chicago Sun-Times (and its newsroom of about 100 people<sup>17</sup>) as part of a local journalism strategy that attracted \$61 million in philanthropic funding.<sup>18</sup>

<sup>15</sup> "Newsroom Investment," Pew Research Center. Accessed 28 Sept 2022: <https://www.pewresearch.org/journalism/fact-sheet/newspapers/#newsroom-investment>

<sup>16</sup> Station Resource Group analysis of data provided by Corporation for Public Broadcasting.

<sup>17</sup> "Newsroom Diversity Report," Chicago Sun-Times. Accessed 29 Sept. 2022: <https://chicago.suntimes.com/pages/newsroom-diversity>

<sup>18</sup> Betsy Berger, "Chicago Public Media Announces Its Acquisition of the Chicago Sun-Times," WBEZ Chicago. Accessed 29 Sept. 2022: <https://www.wbez.org/pressroom/chicago-public-media-announces-its-acquisition-of-the-chicago-suntimes>

**An Increasing Number of Local Journalists are Working in Public Media**  
Source: Corporation for Public Broadcasting

|              | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        |
|--------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Radio        | 2539        | 2659        | 2853        | 2939        | 2888        | 2911        |
| TV           | 1155        | 1207        | 1184        | 1240        | 1272        | 1237        |
| <b>Total</b> | <b>3694</b> | <b>3866</b> | <b>4037</b> | <b>4179</b> | <b>4160</b> | <b>4148</b> |

# Increasing and Maturing Local Journalism Content

As local public media newsrooms have expanded, they have also become innovation hubs for local media, often hiring editorial talent from shrinking newspapers and expanding their public-service mandate to include text-based local news.

The most sophisticated public radio stations (and a few sophisticated public television stations) now have large multi-platform newsrooms with an array of local media products. These media organizations, like WFAE in Charlotte and WBUR in Boston, are building on a foundation of local news broadcast formats which are, in some cases, decades old. In this section, we review the types of local journalism content being produced in public radio and televisions.

**Local News Call-In Shows.** Perhaps the most basic public radio local news format is the local news talk show. Often produced with listener call-in opportunities, these types of local shows create forums for live dialogue and debate on local issues and the local implications of national and international news. WNYC's *The Brian Lehrer Show*, WGBH's *Boston Public Radio with Jim Braude and Margery Eagan*, and *Detroit Today* with Stephen Henderson are examples of local talk shows which have reached local institution status with loyal followings and longtime hosts. Of 119 NPR member stations program schedules we analyzed in March 2022, we found 53% had at least one local news magazine (discussed below) or a news/talk call-in program running each weekday, Monday through Friday.

**Local Newscasts.** The NPR newscast format itself is a blend of local and national news. The NPR newsmagazine "[clock](#)," which structures and coordinates the on-air time of its member stations in the popular commuting hours, leaves segments open for local stations to produce and air their own local news content. According to the NPR audience insights team, the local segments in the NPR One app consistently perform well, and listeners to local newscasts within the app return to the app at a higher rate than those who listen only to national news segments. Additionally, an October 2021 NPR audience insights listener survey found that 40% of listeners using the app "feel more connected to their local station and informed about local issues."

**Local News Magazines.** In addition to call-in shows and hourly newscasts, some public radio and television stations also produce daily or weekly local news magazines. These formats, which are meant to mirror popular national offerings like the *The PBS Newshour* and NPR's *All Things Considered*, are usually hour-long shows featuring a handful of local news stories. NJ PBS's nightly news magazine [NJ Spotlight News](#) (rebranded and strengthened with the acquisition of the digital news website NJ Spotlight), WBUR's [Radio Boston](#), and [Texas Standard](#), a statewide news program produced in collaboration primarily by four stations in Texas are three examples.

**Local News Digital Sites.** The shift to public media digital news has been many years in the making, particularly amongst NPR member stations. NPR maintains a digital team focused on providing a low-cost centralized digital platform support to stations of all sizes. The stations using the NPR-provided content management system are able to publish both national NPR News and local news content. The largest stations in the NPR member ecosystem maintain their own sophisticated digital news platforms, many with the ability to target content and messaging, recruit and convert new members, and deliver an array of sponsorship and advertising products. All of these sites host both listening and text-based local news products. Of 119 stations the authors accessed online in March 2022, we found that 98% had published original local news content in the previous 24 hours. We also found that 50% were publishing an email newsletter focused on local news sent Monday through Friday.

**Local News Podcasts.** Many stations were distributing their local news talk shows, newscasts, and newsmagazines as podcasts long before the podcast renaissance gained steam in 2014. The exponential growth in podcast listening has birthed another wave of audio-based local news products in public media. The strongest local public media stations are producing new local news podcasts such as [The KOSU Daily](#) by KOSU in central and northeast Oklahoma, Vermont Public Radio's [The Frequency](#), and KQED's [The Bay](#). And the public media producer and distributor PRX now runs [a local news podcast incubator](#) to help local stations create new audio-based local news products.

## The Growth of Local Public Media News Collaboration

Even before the current focus on collaboration in mainstream journalism circles, public media was experimenting with building news collaborations across networks of licensees. These experiments have matured and are bearing fruit across the country. The Corporation for Public Broadcasting (CPB) has been particularly important as a source of investment in building collaborative news capacity across the public media system. According to CPB data provided to the authors, between 2009 and 2022, CPB invested more than \$42.1 million across 41 local and regional news collaborations. These collaborations have spanned 150 public media stations and 42 states. Each collaboration team included one new reporter at each collaborating station and one new editor to manage the collaboration.

News collaboratives funded by CPB are instructed to find outside funding once their grant periods end. While some collaborations, such as [Earthfix](#) and [Shifting Gears](#), have stopped publishing online after their CPB grants expired, other collaboratives have continued to produce new stories, such as [Fronteras](#) and [Ohio Valley ReSource](#).



## THE OUTCOMES: GROWING AUDIENCES

### The Strength of the Public Radio Audience

It is easy to overlook or underestimate the size of the NPR member stations' audience reach. NPR's most recent estimate for its total weekly audience was 53 million audience members in fall 2021. (This represents a slight decline from spring and fall 2020—which saw a jump to 60 million during the beginning of the covid-19 pandemic and a U.S. presidential election—but an overall increase from 2016 through 2019.)<sup>19</sup>

Part of NPR and NPR local stations' popularity stem from the popularity of commuting-time listening. In May 2022, NPR-affiliated stations were the No. 1 news stations during morning and/or evening drive times in 31 of the top 50 media markets, based on Average Quarter Hour (AQH; or the number of people listening within a 15-minute period) among those ages 25 to 54. Furthermore, NPR-affiliated stations were the No. 1 news stations during morning and/or evening drive times in the top 10 media markets. In fall 2021, *All Things Considered* reached 11.4 million people each week, and *Morning Edition* reached 11.8 million, according to Nielsen Audio metrics. The next largest non-NPR news radio audience, Sean Hannity, clocked in at less than half that size with an audience of just over 5 million in fall 2021.<sup>20</sup>

Focusing on broadcast audiences, we find that the audience for public radio is both large and stable. For the past decade, the weekly audience for public stations has held steady at roughly 30 million listeners, according to data provided by Station Resource Group, which performed this analysis using Nielsen Audio data. NPR estimates that in fall 2021, the weekly audience for all of public radio was 35.8 million. Looking specifically at the weekly broadcast audience numbers for NPR member stations, the total for 2021 came to 33 million. In 2011, that number was more than 34 million, and in 2001, that number was more than 25 million.

<sup>19</sup> Data provided by NPR Audience Insights.

<sup>20</sup> Ibid.

NPR assesses its broadcast weekly audience by combining NPR-distributed programming and newscasts. Between fall 2016 and spring 2021, NPR's smallest audience was 23 million per week in spring 2020, and its highest highest audience was 30 million per week in spring 2016 through fall 2017. Fall 2021 saw NPR's total audience fall to 25 million per week. These fluctuations may reflect broader changes in news consumption during and after the U.S. presidential election cycle in 2016, as well as the pandemic-induced reduction in commuter times.

Many local stations enjoy dedicated broadcast listenership. On average, a core listener to a station tunes in 18 times a week.<sup>22</sup> Annual listener hours in 2020 total well above 3.4 billion.<sup>23</sup> In the five years between 2016 and 2020, the peak was close to 3.9 billion in 2017. As referenced above, many public radio stations now rank first in their broadcast markets. According to data provided by the Radio Research Consortium (RRC), the public radio stations in San Francisco, Washington D.C., Boston, Portland, Raleigh and Seattle rank No. 1 in their markets.

According to data provided by Audience Research Analysis (ARA), the three stations in fall 2021 with the largest weekly cumulative audiences were WNYC in New York with about 822,000 listeners each week, KQED in San Francisco with about 698,000 listeners each week, and KPCC in Los Angeles with about 682,000 listeners each week. In fall 2021, the top three most-listened stations were in New York, with 26,600 people tuning in on average per quarter hour; followed by San Francisco with 23,300 people; and then Chicago with 21,800 people listening. In fall 2021, the top three stations by "loyalty" (the number of hours someone listens to a particular station in a given week) were KSKA in Anchorage, followed by WEKU in Lexington-Fayette, and Kansas City's KCUR.

Establishing the cumulative local digital audience of public media licensees is very difficult. The closest estimate we can assemble is the number of weekly website unique users for NPR member stations. NPR audience analytics reports that between 2015 and 2021 remained largely stable at about 5 million. During the early days of the pandemic that number rose above 15 million and slowly declined back to about 5 million.

<sup>22</sup> Data provided by Radio Research Consortium.

<sup>23</sup> Data provided by Greater Public, via Radio Research Consortium July 2021 data.





## EXPLAINING PUBLIC MEDIA'S LOCAL JOURNALISM EVOLUTION AND EXPANSION

What accounts for the growth of public media local journalism amongst public radio stations? This is a key question for policy makers, funders, and industry leaders looking to rebuild local news. We attribute the growth of public media local journalism to three fundamental related features of the public media system: organizational sophistication and maturity, the federated structure of public media, and the resulting financial strength of the system as a whole.

**Organizational sophistication and maturity.** One key driver of the sustained expansion in local journalism capacity and local public service is the increasing sophistication and maturity of public media organizations, especially amongst the largest stations. Leading public media stations have invested in developing efficacy across key organizational components. Investment in strengthening editorial, formal human resources capacity, product development capability, marketing and sales expertise, development muscle, and editorial strength have each been critical to the local journalism growth of the strongest stations.

These components of organizational sophistication and maturity have allowed stations to develop benchmarking tools and improve business and content practices across their products. The stability and financial capacity of public media news organizations has attracted experienced talent from print and mainstream broadcast news.

We have seen a positive feedback loop at work in licensees that have invested in their organizational capacity. The expansion of corporate support staffing capability and the development of networked back-office operations have

created additional bandwidth and expertise, which are fueling the next stage of organizational growth and service in the largest licensees.

It is important to note that the organizational practices around development and underwriting have become particularly sophisticated in large licensees. Development practices that now target upgrading donors, expanding corporate support sales, and in some cases building endowments have all supported expanded newsrooms.

The organizational strength and sophistication of the largest licensees have also allowed them to pursue resource efficiencies and to be able to house multiple media services under one administrative apparatus. For example, Louisville Public Media has a classical music radio service, a news/talk service, and an adult alternative music service, as well as an investigative reporting center, all under a single operating organization. This kind of arrangement allows a public broadcaster to maximize revenues and service while sharing costs.

The culture and leadership of large public broadcasters has also undergone a growth spurt. As these organizations have matured, their leaders have come together to engage in more advanced, station-level and industry-level planning. This includes ambitious cross-industry coordinated audience growth efforts like the Station Resource Group's 2010-2011 effort to [grow the public media audience](#).

## **The federated structure of public media.**

The U.S. public media system is structured as a federated network in which local licensees retain their own governance and decision rights but affiliate together through contracts and membership in national organizations. This means that while there are strong network actors (NPR and PRX, for example) that can share pools of resources, licensees operate independently of each other with their own governance and ultimate decision-making for products and services.

This federated structure has created an underlying buffer against organizational decay—allowing licensees to mature and embark on individual developmental paths. Licensee boards tend to be robust and well-developed with strong links to other community institutions. Licensees, as a result, have a remarkable longevity, despite many of them outgrowing their founding educational and cultural mandates. For example, NPR launched with 88 member licensees in 1970, and as of 2022 there are 250. These NPR members own and operate more than 1,000 station signals nationwide, as of fall 2021.<sup>24</sup>

**Increased resources and business model sustainability.** Our analysis leads us to believe that the result of growing organizational sophistication, buttressed by the federated structure of public media, has been an increase in resources and sustainability for individual licensees and the public media system as a whole. Mature stations in major media markets in particular have grown dramatically over the last five decades, especially compared to other local media outlets. This is remarkable given the overall corporatization and digitization of media and shrinking of commercial local news media during the same time period.

<sup>24</sup> Data provided by NPR Audience Insights.

All of these factors combine to explain the central observation that attracted our attention: Namely, news-focused licensees and the stations they control appear to be expanding their local journalism capacity during a period when other sectors of the local journalism industry were contracting. Especially among the larger public radio licensees, the maturity of their organizations, the increasing sophistication of their leadership and the strength of their revenues have provided a strong, stable foundation that these organizations are using to continue their role as NPR affiliates for national news and, now, to expand their role of providing original local news content within local markets.



## CAVEATS

Having reviewed the sustainability, capacity, and reach of the public media system, as well as the insights generated through this assessment, we turn now to address the limitations of our analysis and weaknesses within the public media system.

### **Public media professionals are having to define and refine what local news means.**

“Local news” means different things in different markets. In many public media organizations, local news means metro or regional news, rather than community or hyperlocal news. As public media seeks to exert more leadership in local journalism, we see public media professionals working to become more specific about the different needs of the audiences served. Defining “local news” includes examining what it means to “serve the public.” In broadcast formats, reaching the local public entails attracting people across wide geographic areas to tune into a radio or television signal. Embedded concepts of a general broadcast “public” do not translate well into other media, particularly digital media, where media consumers are used to more tailored content.

### **Institutional change is slow.**

Public media institutions have many stakeholders; the most successful ones are deeply embedded in their communities and in the wider public media system networks. Some licensees are part of university systems, others operate as independent nonprofit organizations. Many are required by CPB to have community advisory boards. The multiple overlapping stakeholder groups lend a richness and heft to public media—they also can significantly slow the process of change. Investments in public media are not an “instant results” proposition. Change tends to be slow but long-lasting—and highly dependent on visionary leadership and strong upper management teams.

As we assess the pace of change we can expect in the public media system, one critically important organizational feature stands out: Whether the station’s public broadcasting license is held by an educational institution or a community-based nonprofit. Of the licensees supported by the Corporation for Public Broadcasting, about 46%, or 184 public radio licensees, are owned by a

university. Nearly 43%, or 171 public radio licensees, are community-owned. The remaining 11% of public radio licensees are state and local-authority owned.<sup>25</sup>

Institutional ownership by a university, community college, or state entity provides financial resources and shared services, but can also create confusing and conflicting governance because other interests (in universities, for example) can dominate the agenda. Institutional licensees in universities or as part of state agencies can face constraints on content development, fundraising, hiring, policy, and human resources. Indeed, the most innovative stations have tended to be “community licensees,” that is, public broadcasters governed independently from any other institution. WNYC in New York and WBEZ in Chicago are two examples of stations that became more dynamic after they changed their local government ownership model and became independent community licensees.

Apart from licensee ownership status, the size of a licensee in terms of personnel and budget also deeply influences the rate of change. While larger licensees enjoy a high degree of functional specialization, it is generally true that large organizations tend to change more slowly than smaller ones.

## **Growing audience and public service over the airwaves has often meant underserving already underserved audiences.**

The irony of public media’s secret to audience growth is that public media content often super-serves those most likely to listen often and contribute: educated, white, affluent audiences. The concerted and successful audience development efforts beginning in 1988 have produced a large, loyal, supportive audience of mainly educated, white listeners and viewers. Perhaps the most critical insight of those audience studies was that level of education is the variable that most closely predicts listening, loyalty, and ultimately giving.

Public media is being called to account for the audience it has created, and many efforts are underway to expand content and service to truly diverse audiences. Given the slow pace of institutional change, this will take time and leadership. But because the institutional mission of public media highlights the value of public service, change is happening.

## **Gradual changes to broadcast listening and viewing habits will continue to put pressure on licensees to evolve or lose relevance.**

The pandemic led to a [dip in broadcasting listening](#) and surfaced questions about changing habits among consumers. Listening levels in closely-researched markets dropped from about 9 million listeners in winter 2020 to about 6.7 million listeners in spring 2020. By fall 2021, that number had returned to about 8.1 million listeners.<sup>26</sup> The Radio Research Consortium, a nonprofit research group for non-commercial radio stations, attests in its report that “90% of listening (AQH) is

<sup>25</sup> Data provided by Station Resource Group in November 2021.

<sup>26</sup> Data provided by the Radio Research Consortium (RRC) in a fall 2021 report.

back.” While in-home listening maintained roughly the same numbers of listeners throughout the pandemic, the out-of-home listening numbers have yet to fully return to their pre-pandemic numbers.<sup>27</sup>

But here again, public television and public radio are on different trajectories. Public television is well-known to suffer from “zombie stations”—licensees programming stations almost entirely with repeats of national content and producing little or no local content at all. Indeed, public television as a whole suffers from a lack of local news programming. This is partially because, unlike in public radio, the public television’s flagship national news program, *The PBS NewsHour*, did not evolve the kind of local/national news programming blend and programming partnerships that have helped seed local journalism in the radio system.

In sum, while over-the-air broadcast viewing and listening continues a gradual decline, that decline is far from evenly distributed over time and place. The push-and-pull of fluctuating viewing and listening habits is putting pressure on licensees to evolve even more quickly, and become even more sophisticated in the ways they develop news and information products and deliver those to audiences across platforms.

## **Inequalities in the public broadcast system mirror inequalities in the country as a whole.**

Public media growth and evolution has been concentrated among licensees whose metro areas have tended to enjoy disproportionate population and economic growth. As shown above, amongst the roughly 120 public radio licensees one of our authors examined, seven earned more than \$25 million each in FY2020 revenue, while another 15 stations earned more than \$10 million each. There is a long tail of smaller stations with revenue earnings of less than \$10 million, and most stations fall into this third category.

CPB, NPR, PBS, and other national organizations work hard to help mitigate these imbalances at a network level. But differences in resources and capacity remain. For licensees that have grown large enough to have specialized development staffing, the pace of growth increased, while others have stagnated.

<sup>27</sup> The bounce-back of listening following the pandemic slump varies by market. Persons aged 45-64 represent the largest cohort of listeners for public radio, followed by the persons 25-44 cohort.

## CONCLUSIONS

We hope our data and insights shed light on an area of strength and evolution in local journalism. We also hope that policymakers, industry leaders, and journalism funders will draw some lessons from the growth and expansion of public media that will contribute to the overall task of rebuilding local news. In this final section, we offer three key lessons learned from our public media research that should inform those working to rebuild local news.

### **Lesson 1: The “network effect” of public media cannot be overstated.**

Our first lesson is that building and nurturing multi-faceted networks among news organizations is just as important as boosting direct support for newsgathering. Public media organizations and public media audiences have benefited hugely from the highly networked structure of the field. The networks supporting public media take many forms: content collaborations, shared services, professional associations. The most visible network is the formal local/national content sharing system, which is supported by shared distribution technologies.<sup>28</sup> But the infrastructure backbone network is one of many supporting the growth and vitality of public media.

Other layers of shared infrastructure have evolved over time—including shared digital infrastructure built and maintained through network leaders like NPR and PBS. While these infrastructures have tended to support national sharing to local partners rather than vice versa (with the exception of PRX), active and robust conversations are taking place about how to build the next set of digital infrastructure that supports and enhances stations as local news organizations.

Policymakers, journalism funders, and industry leaders in other parts of media can learn from the successes of public media networks and invest in growing the layered, networked capacity of news organizations operating in other media.

<sup>28</sup> Shared distribution technologies include Public Radio Satellite System and PRX in the case of public radio; and, for public television the Next Generation Interconnection System operated by PBS, the PBS Passport OTT broadband content distribution platform, and several independent interconnection services that provide centralized distribution functions including contracts and fees between producers and stations.

## **Lesson 2: Media organizations and media systems take time to mature.**

Our second lesson is that true change in local media takes time, because media organizations and media systems require time to mature. Most public media stations are at least 50 years old. Many digital news organizations in operation today, by contrast, are less than a decade old. For example, according to the INN Index published in July 2022, more than 135 member organizations launched within the past five years, about double the number over the prior five-year period.<sup>29</sup>

But we have also learned from our research that smart investments can speed the maturation of organizations and evolution of local media systems. From our analysis of the drivers of growth in public radio, we would agree with funders like the American Journalism Project that investing in the business-side capacity of new news organizations and supporting the growth of their development staff should yield positive results for sustainability. Our research shows that the pace of growth amongst the public radio stations that have become old enough and large enough to have specialized development staffing has increased relative to peers that have not made those investments.

The current strength and vitality of public media took decades to come to fruition. Because organizations and media systems take time to mature, funders and industry leaders should continue to take the long view in the task of rebuilding local news.

## **Lesson 3: Many public media organizations are ready to serve as anchor institutions for their local news ecosystems.**

Our final lesson relates to the huge opportunity that public media presents for those looking to rebuild local news. The last decade has seen an explosion of experimentation in local news and new news organizations foundings as the newspaper-based local media system has atrophied. If the challenge is to sustain and grow these new experiments and new newsrooms, then ecosystem-level leadership has to be in place in order to achieve greater impact with fewer resources, and to foster collaboration instead of competition.

We would argue that many public media organizations are now ready to step into the role as anchor institutions in their local news ecosystems—providing the platform services, governance, and coordination support that their national network counterparts provide for local stations. Strong public media organizations are absolutely ready to acquire other forms of news media, as has happened in Chicago, Dallas, Los Angeles, New York, and elsewhere. Public media acquisitions of news media providers are one of the most exciting developments in public media in recent years and show huge promise for rebuilding local journalism. We anticipate that licensees capable of anchoring local news ecosystems will become even more critical going forward as commercial print-based local media risks disappearing altogether.

<sup>29</sup> Emily Roseman, Michele McLellan, Jesse Holcomb. "INN Index 2022: Enduring in crisis, surging in local communities," Institute for Nonprofit News, accessed on 29 Sept. 2022 at: <https://inn.org/research/inn-index/inn-index-2022/>



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## About Wyncote Foundation

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