

ARIZONA PUBLIC MEDIA®



Community Advisory Board Meeting
March 16, 2017

Call to Order

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Welcome and Introductions

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Welcome and Introductions

Guest:

Dr. Patrick Marcus, Marcus Engineering, LLC

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March and April Birthdays

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This season on AZPM...

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Consent Agenda

Agenda Item III.
(pages 1-5 of agenda)

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Committee Reports



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Committee Reports

Community Engagement

Committee met on March 2nd

Jennifer Casteix, Chair

- Tucson Festival of Books
- *American Experience: The Great War*
 - March 20 at The LOFT, 6:00pm
 - March 27 at The Center for Creative Photography, 6:00pm
- *PBS Kids* and Education Outreach Activities
- Community visibility and engagement a top priority in the new strategic plan.



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Committee Reports

Development

DevComm met on March 1st

Hank Peck, Acting Chair

- Thanks to Hank Peck for stepping in for Roxie Lopez
- CAB TY call project update
- Menu of Engagement
- Meeting frequency increased - 4th Mondays, even months
- Personal notes for End of Fiscal Year campaign
- Revenue update



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Committee Reports

Executive

Committee met on February 17th

Susan Tarrence, CAB Vice Chair

- Evaluation of January CAB Meeting (p. 15-16)
 - Access CAB book contents online
 - News/Journalism discussion
 - Polling technology issue



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Committee Reports

Financial Info

Financial Info Committee met on March 1st

Paul Lindsey, Chair

- Revenue strong (nearly 13% above budget for 1Q & 2Q)
 - Major Gifts +62%
 - Planned Gifts +412%
- Expenses under budget (16%)
- Planning for potential loss of CPB funding



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Committee Reports

Governance

Jill Perrella, Chair

Governance Committee met on February 22nd

- New CAB appointments
 - Ed Frisch (replaces Scott Vaughan)
 - Christina Noz (replaces Adrian Shelton)
 - One seat opening in May
- CAB Self-Assessment at May meeting
- Emeritus membership criteria to be revisited and expectations clarified



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Committee Reports

Strategic Planning

Committee met on March 3rd

Anne Maley, Chair

- Reviewed progress report on planning activities:
 - Mission, Vision, and Values Statements
 - Strategic Priorities
 - Outline of Strategies
 - Timeline
- Staff working to develop tactical plan that addresses the *strategies developed to address the strategic priorities*
- Committee will present plan to ExecComm in April and to CAB for endorsement at the May 25 Annual Meeting.



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Old Business

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Old Business

Spectrum Auction Update

Jack Gibson, AZPM GM

You may have read or heard about stations selling broadcast spectrum to FCC.
“Quiet Period” concluded. Second PBS stations in Tampa \$18.7M; and Flint Michigan \$14M.

Here’s a recap...

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Old Business

Spectrum Auction Update

Jack Gibson

AZPM Participated:

Offered to move KUAS Channel 27 to a VHF frequency for no less than \$50M.
Concluded reverse auction bidding at round 12 when bid fell below \$50M.

Upside: Potential new revenue; continued ops for OTA HH on VHF frequency

Downside: Change; marketing challenge; technical costs

Fortunately, neither KUAT Channel 6 or KUAS Channel 27 were affected by “repacking” (channel changing to accommodate new order).

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New Business

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New Business

John Kelley, AZPM COO

Classical
90.5 FM 89.7 FM

Audience Report

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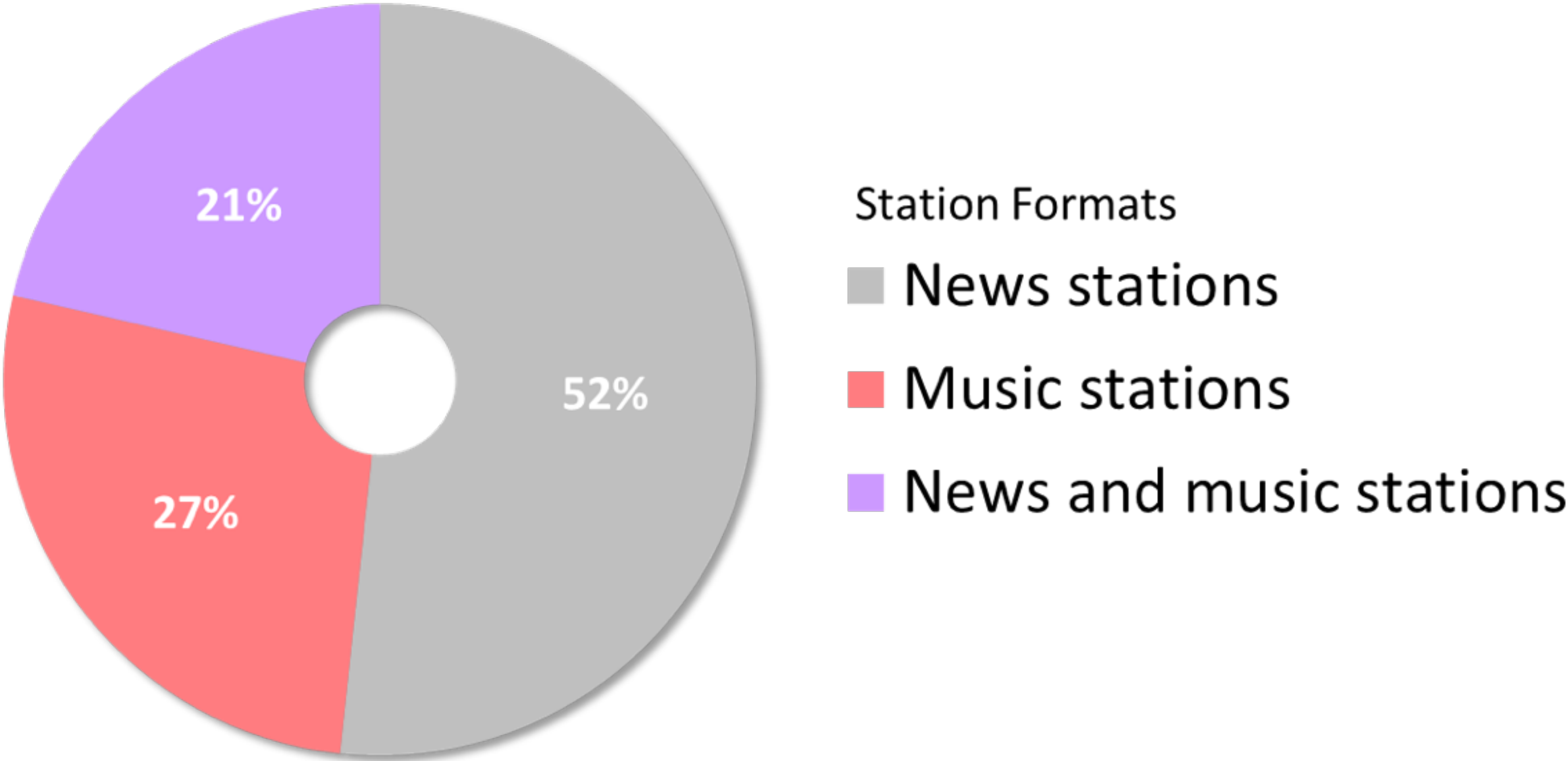
azpm.org

Classical Music on the Radio

A National & Local Overview



Share of All Public Radio Listening



Source: Arbitron, Public Radio Today 2013

Station Resource Group

Public Media's Classical Music Services

- 66 public media organizations offer an “all classical” service*
 - 150 stations, 70+ streams, many translators
- 48 organizations offer news and classical mix
 - 155 stations
- Networks, distributors, and producers
 - WFMT, PRI, APM, NPR, PRX
 - International broadcasters
 - Independent producers

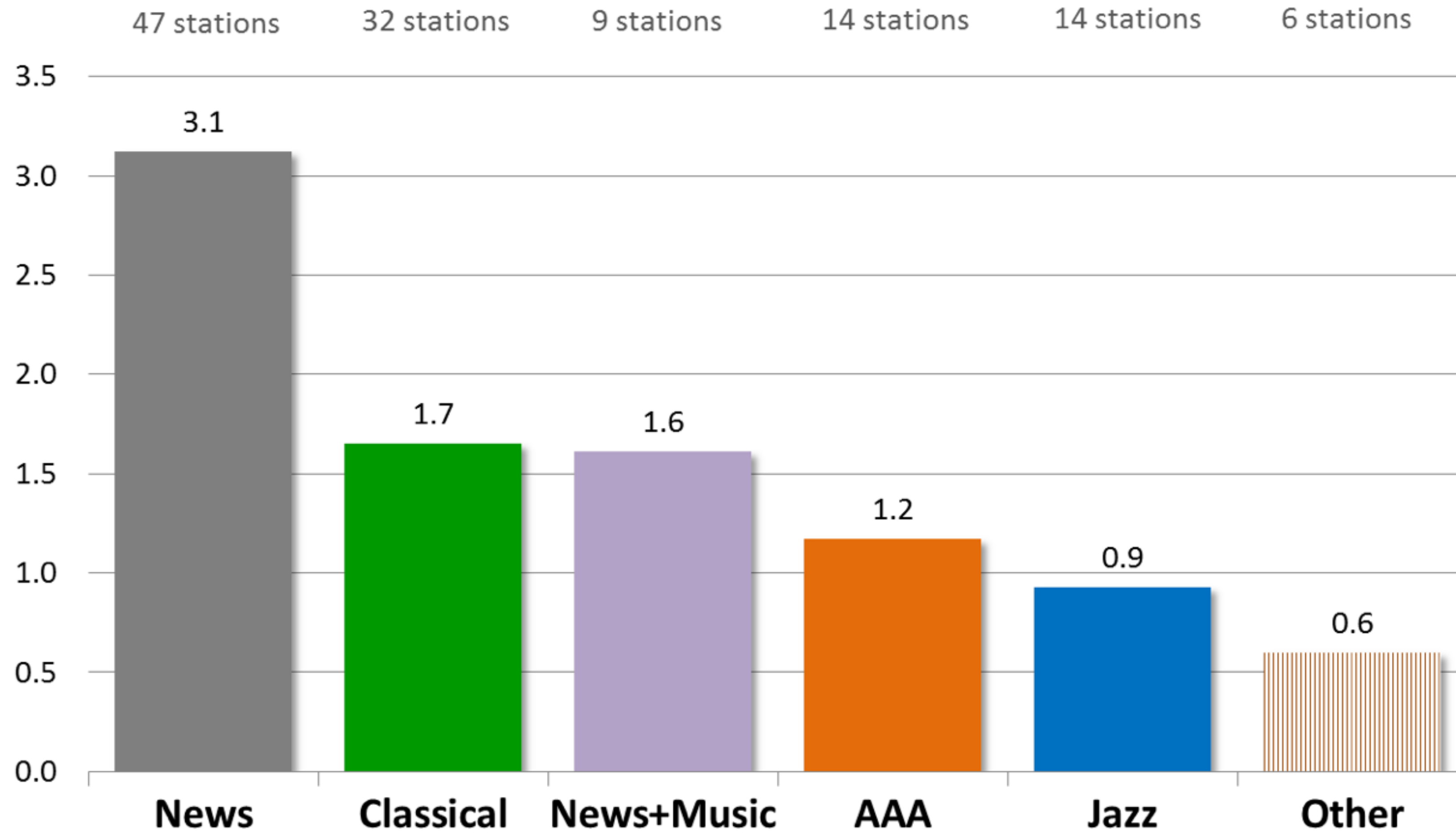
* Stations with schedules that include at least 70% classical music.

Public Media's Classical Music

- Nearly **11 million** Americans listen to public radio classical music each week
 - 6.3 million to “all classical” stations
 - 4.2 million to mixed format stations
- Around the clock, over **200,000** listeners on average are tuned to an “all classical” station

Different Station Formats: Different Shares

Average Share, Top Station in Format, Top 50 Markets, Metro Survey



Source: Nielsen; Radio Research Consortium

Station Resource Group

AQH Metro Share (Mkt 62)

Fall 2016

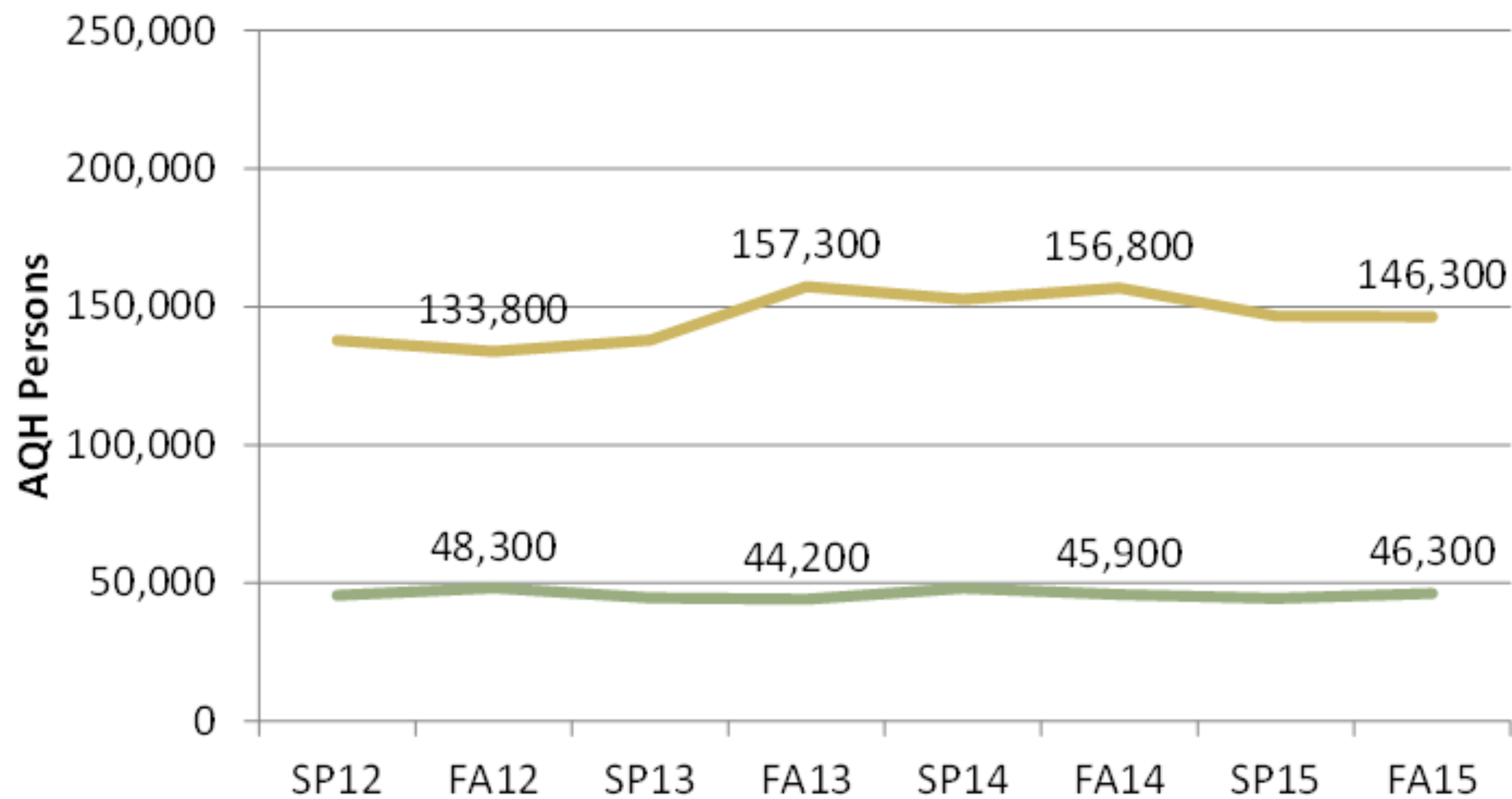
Classical 90.5: 2.1

NPR 89.1 (AM&FM): 6.0

Classical Stations Listening Trend

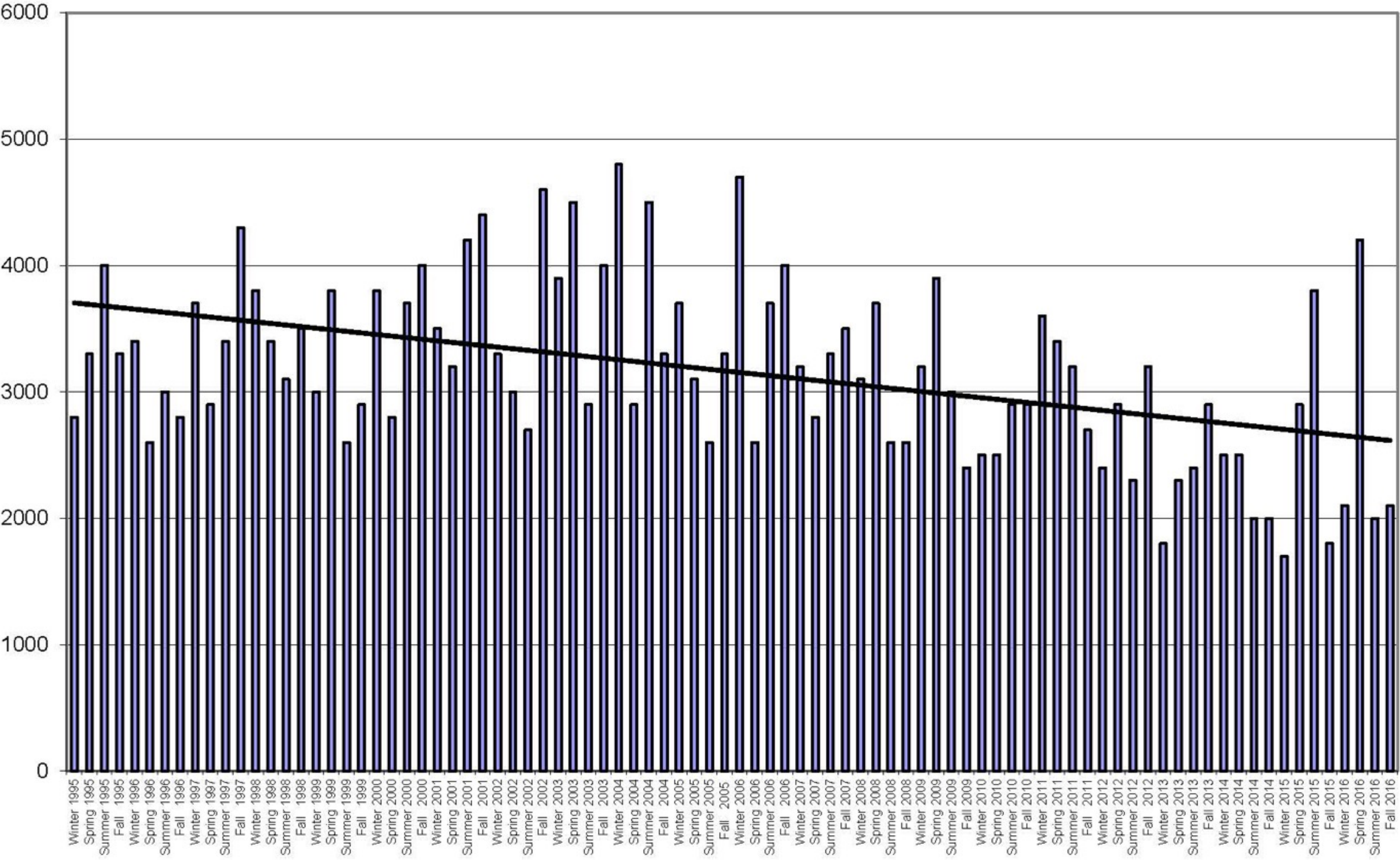
Persons 12+ Mon-Sun 6am-12m

PPM Markets Smaller Markets

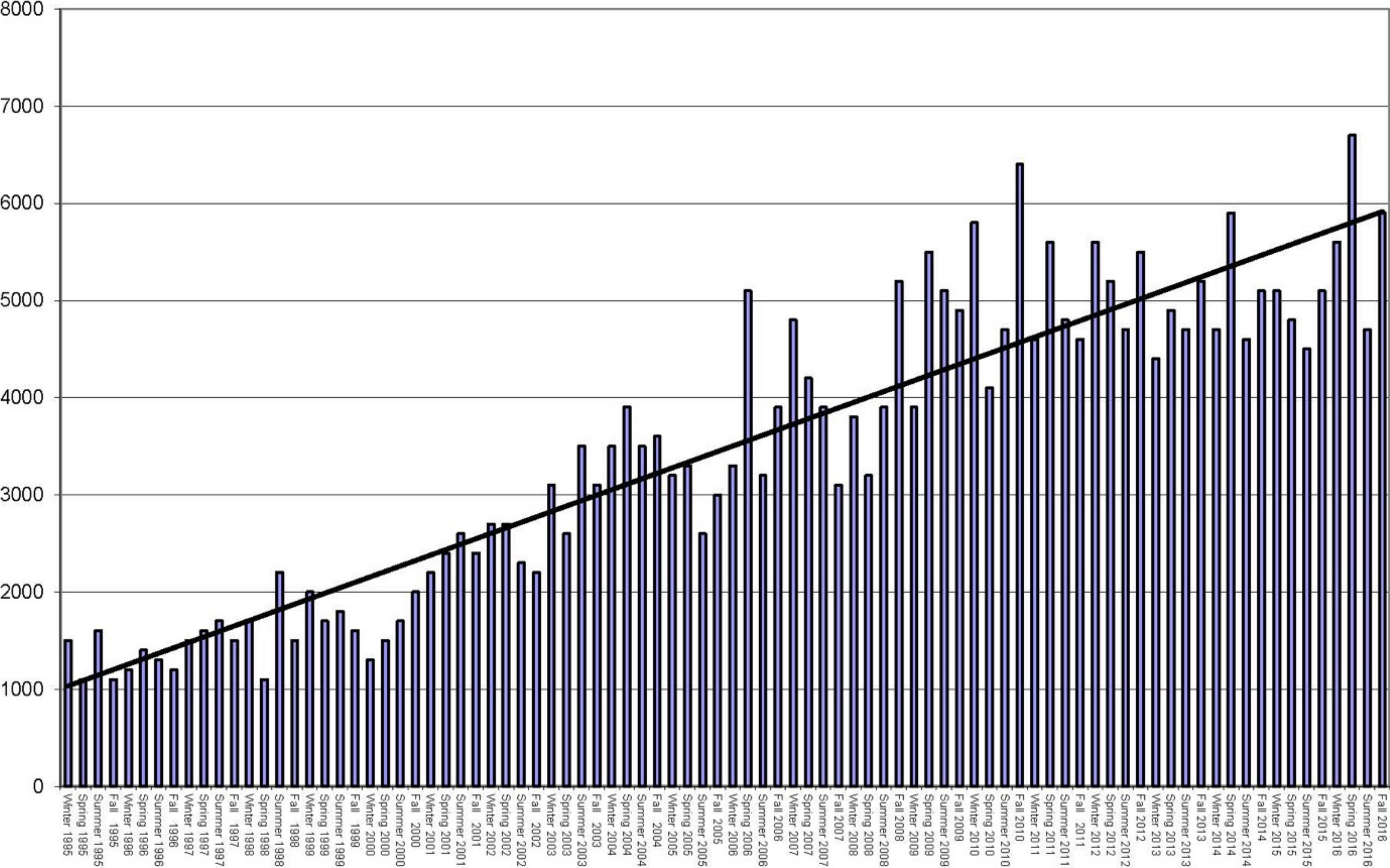


National AudiGraphics/Nielsen Audio

KUAT-FM AVERAGE QUARTER HOUR TRACK
(Metro, 12+, M-S, 600-MN)



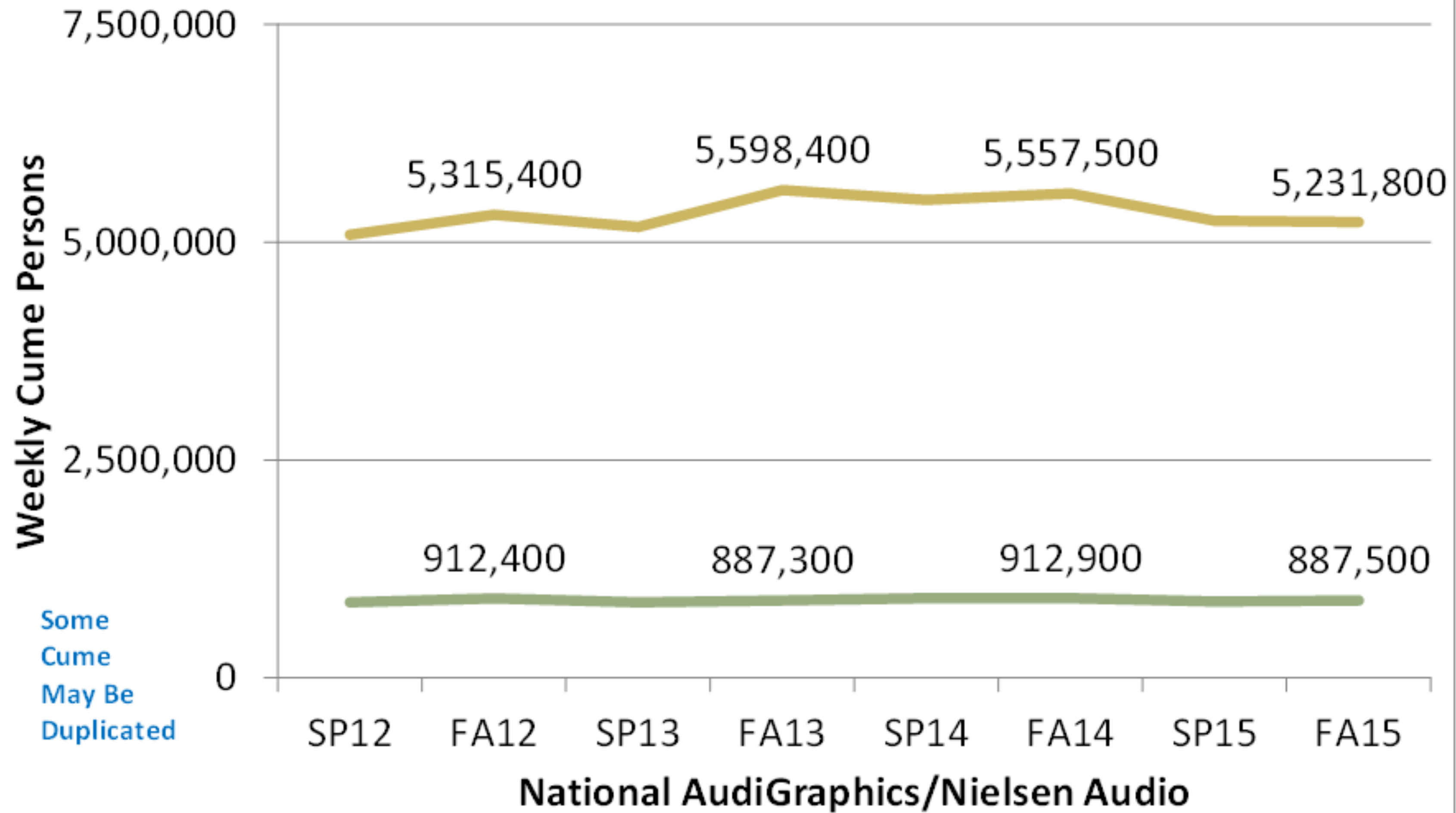
KUAZ AQH TRACK



Classical Stations Reach Trend

Persons 12+ Mon-Sun 6am-12m

PPM Markets Smaller Markets

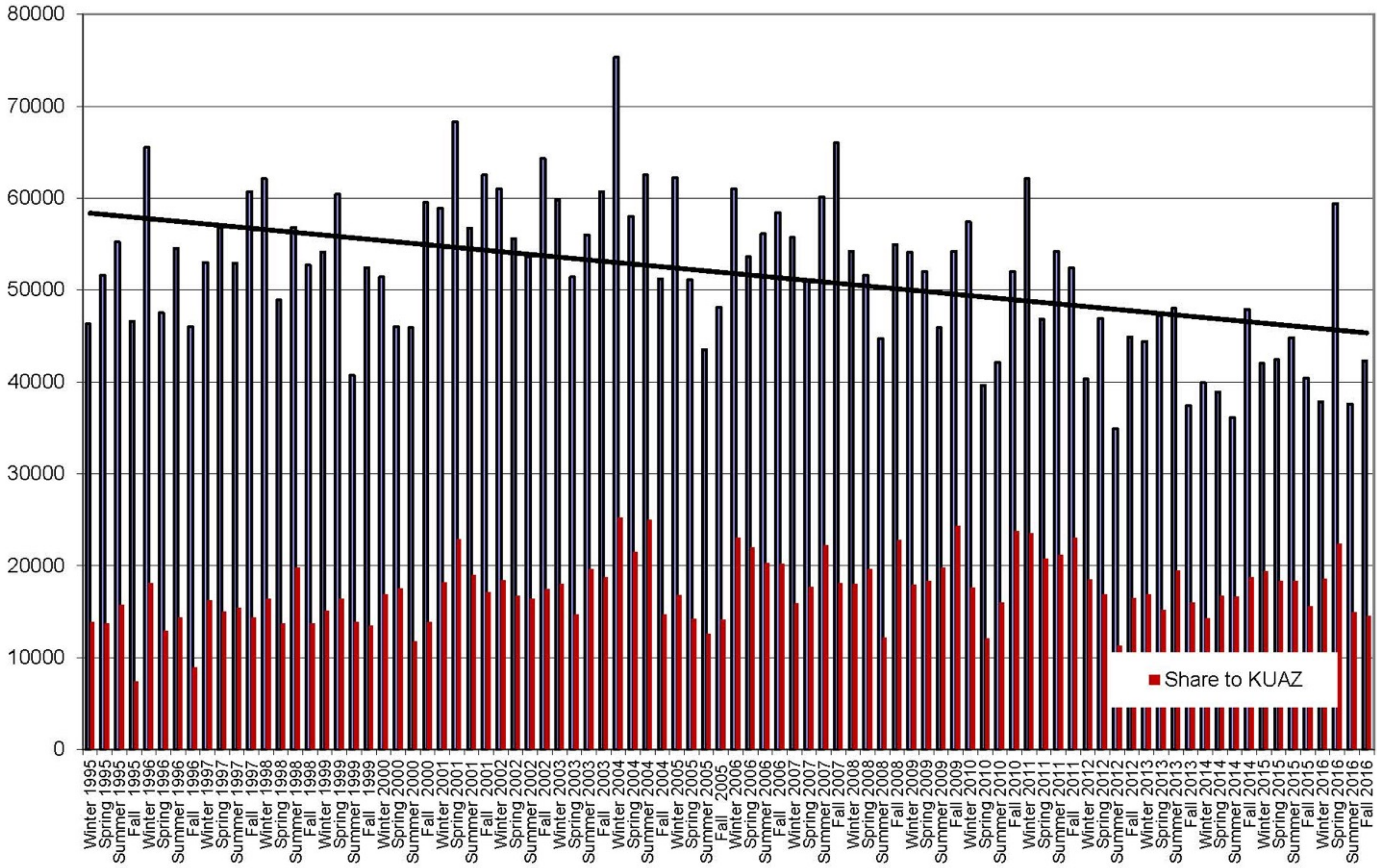


TSA Cume: Fall 2016

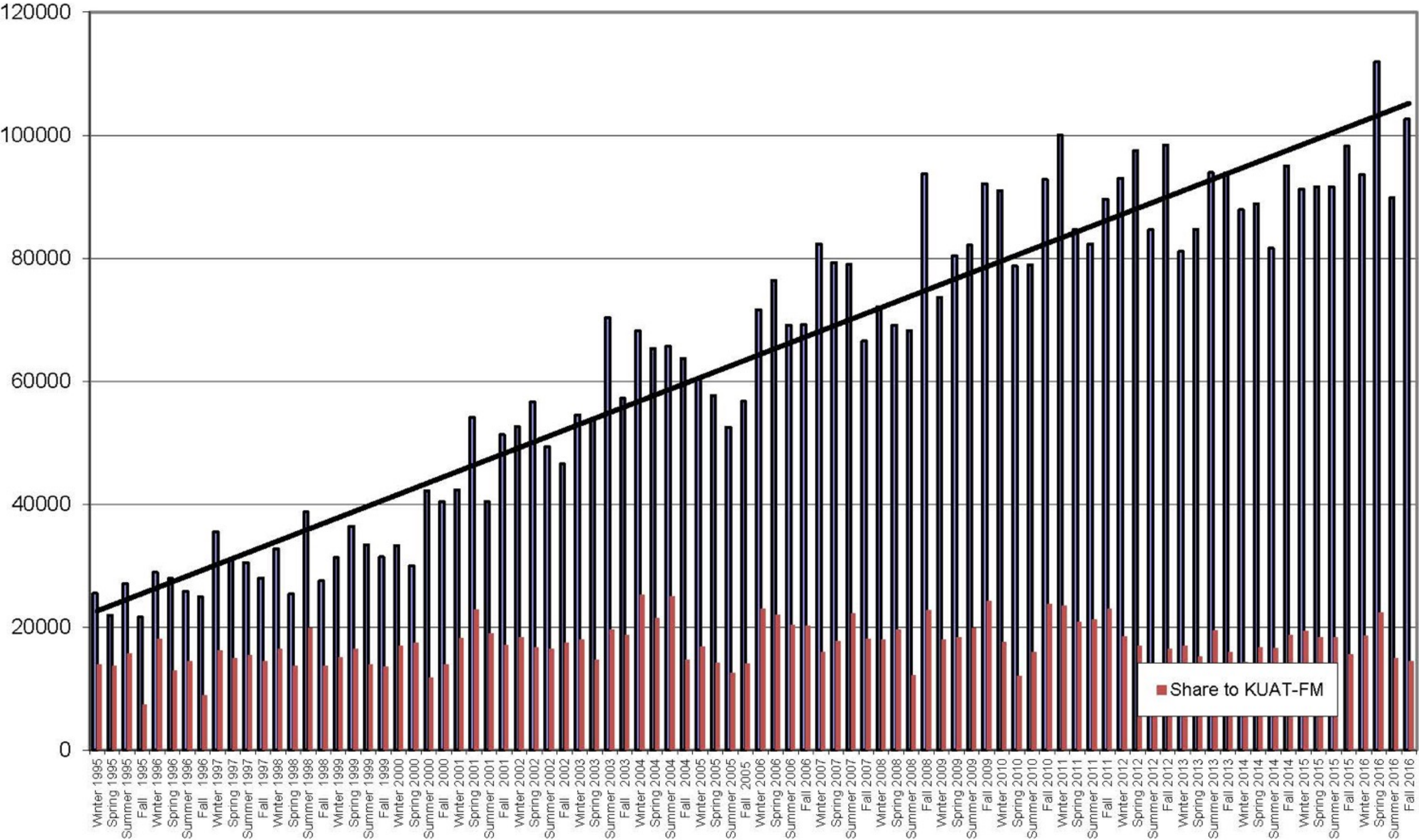
Classical 90.5: 54,900

NPR 89.1 (AM&FM): 111,200

KUAT-FM CUME TRACK



KUAZ METRO CUME TRACK



AZPM Classical/NPR Crossover Listening

1995: 12,675*

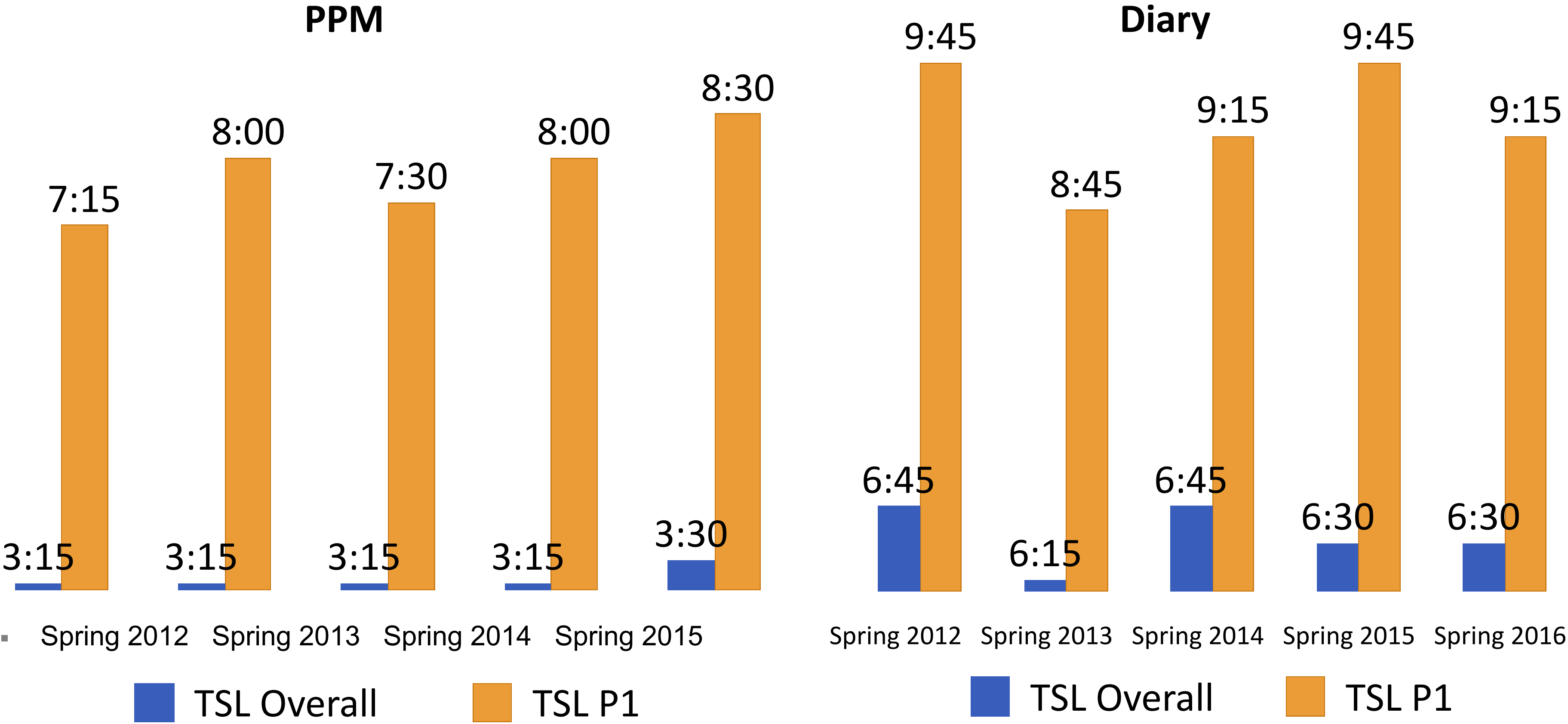
2016: 17,600*

$\Delta = 4,925/39\%$

*Arbitron/Nielsen 4 Survey 12+ Metro Avg

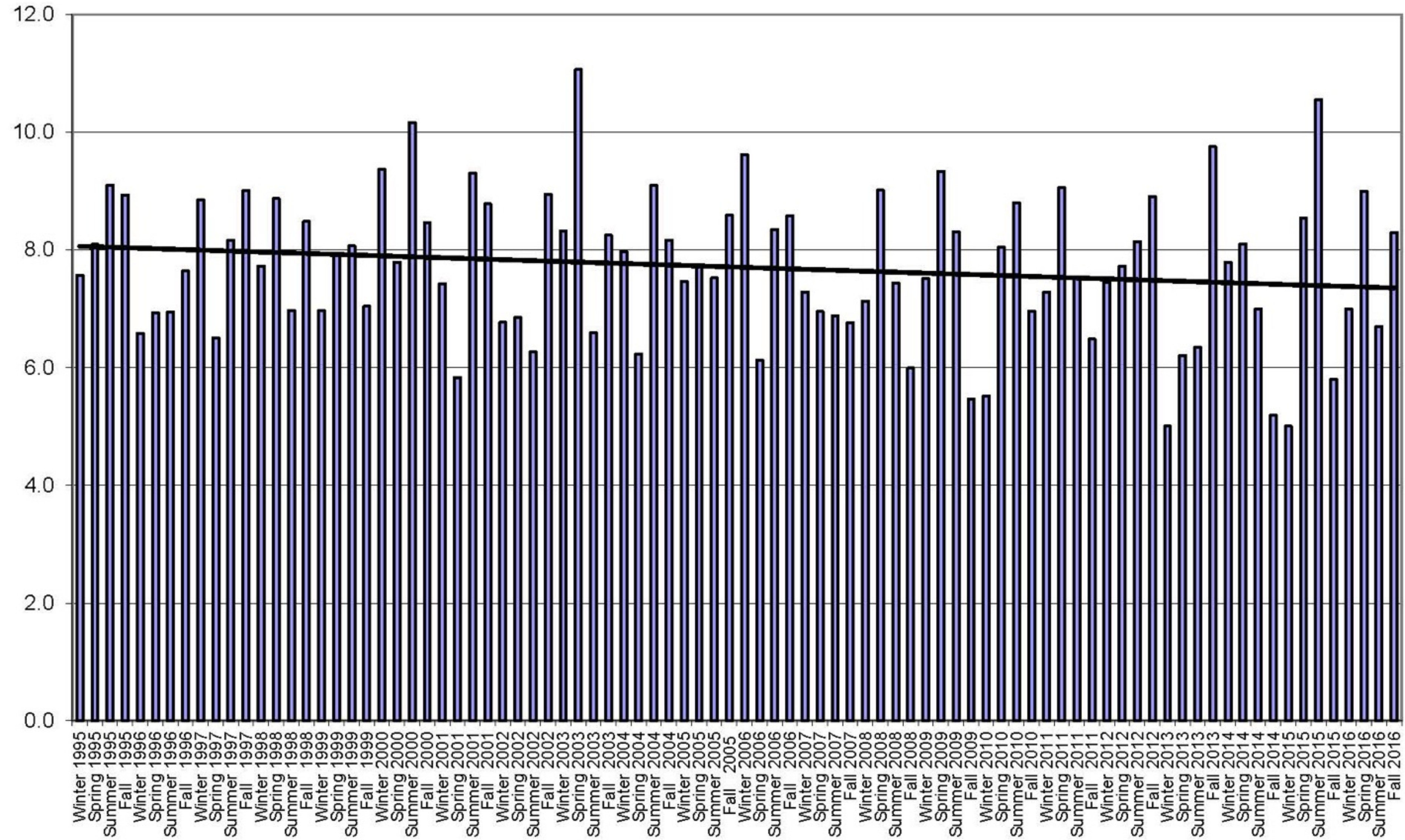
Classical TSL in PPM markets has increased in the past year

Classical TSL in Diary markets has decreased but listening time is longer than in PPM markets, as would be expected in light of diary methodology.

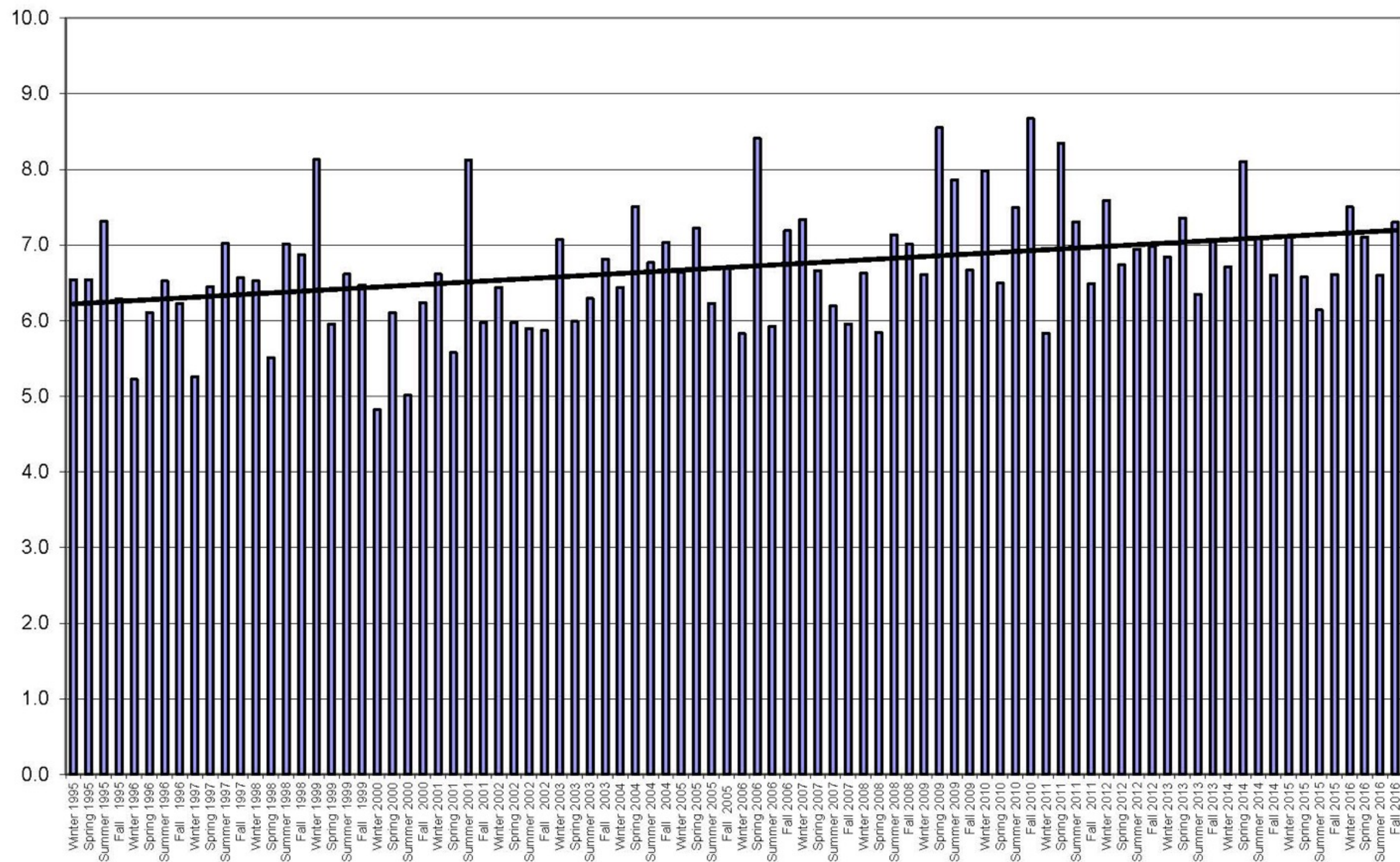


Source: © 2017. The Nielsen company. All rights reserved. Nielsen PPM/Diary data via Act 1 Systems. 26 stations, AQH Persons, P 12+, Spring 2016

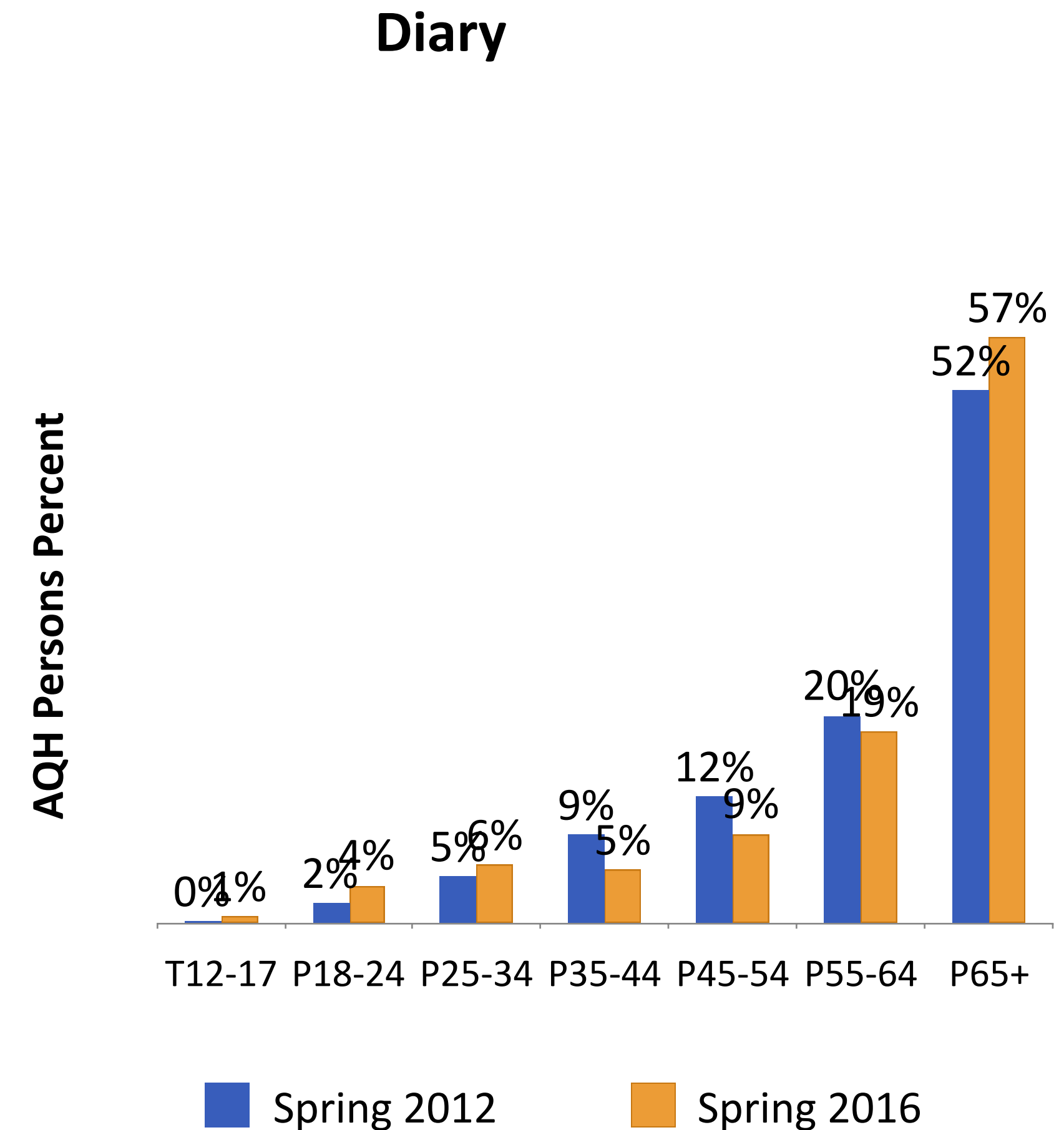
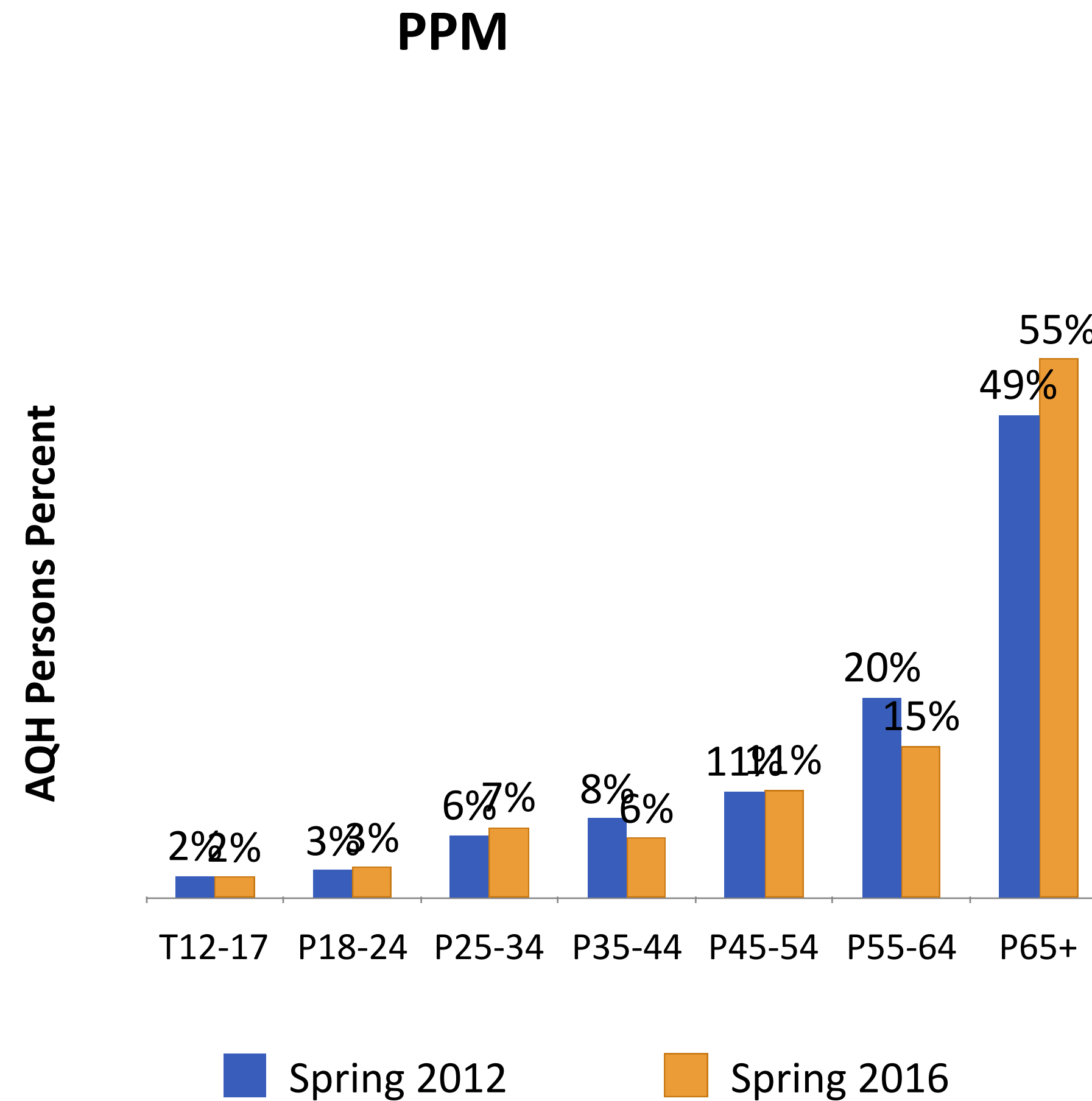
KUAT-FM TSL TRACK



KUAZ TSL



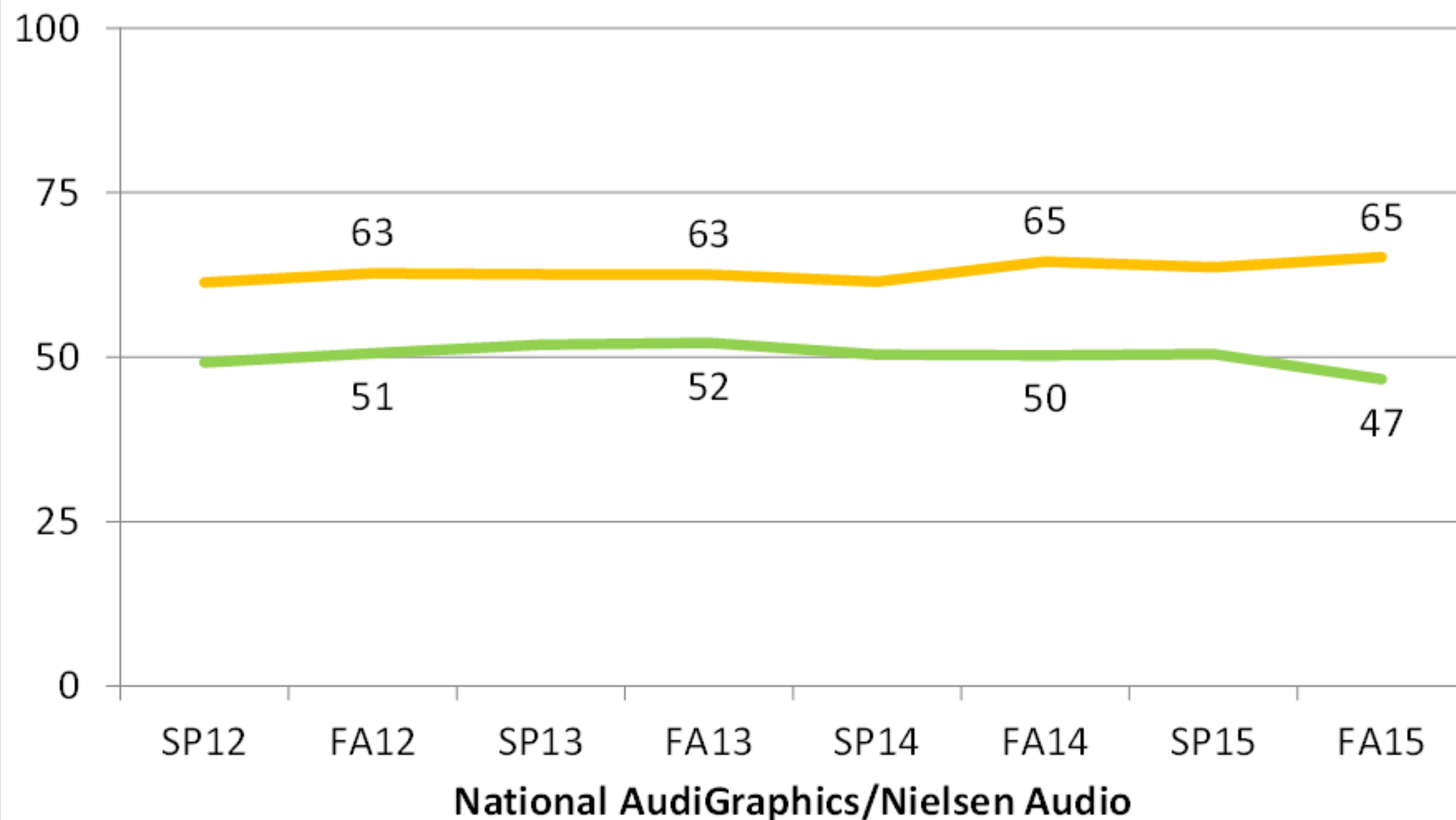
Listeners to Classical PPM and Diary stations, growing among 65+



Demographic Trend - Classical Stations

Persons 12+ Mon-Sun 6am-12m

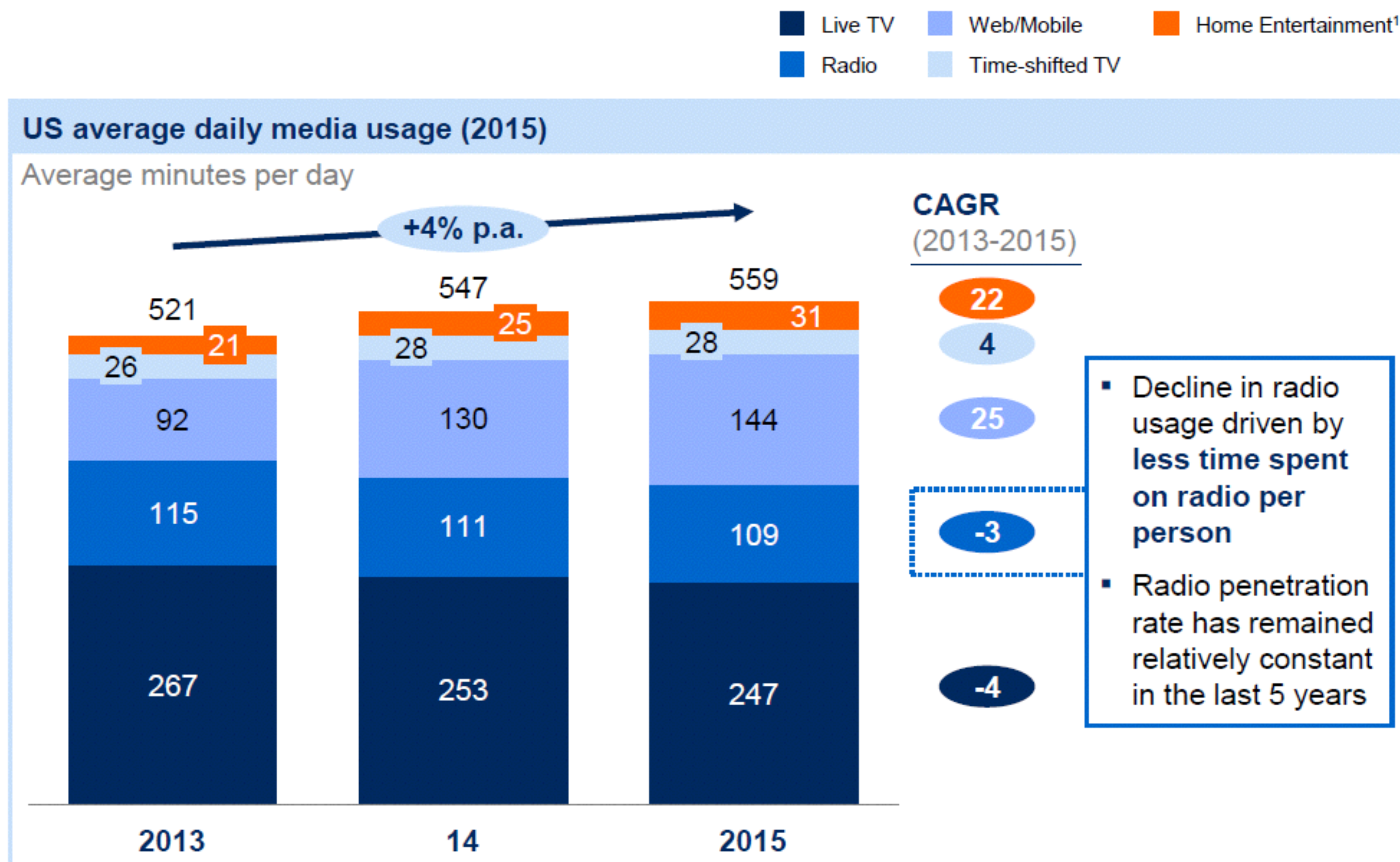
Median Age Male Composition



Classical 90.5 Demographics

- Primarily 65+ (with little fluctuation since 1995, so it's not one cohort)...
- responsible for as much as 50% of weekly cume, and
- up to 2/3 of reported quarter hours
- Female: 50.7%; Male 49.2% (0.1?)

5 US radio usage has been declining by 3% p.a. while internet media has been growing over 20% p.a.



¹ Includes game console, DVD/BluRay and multimedia devices

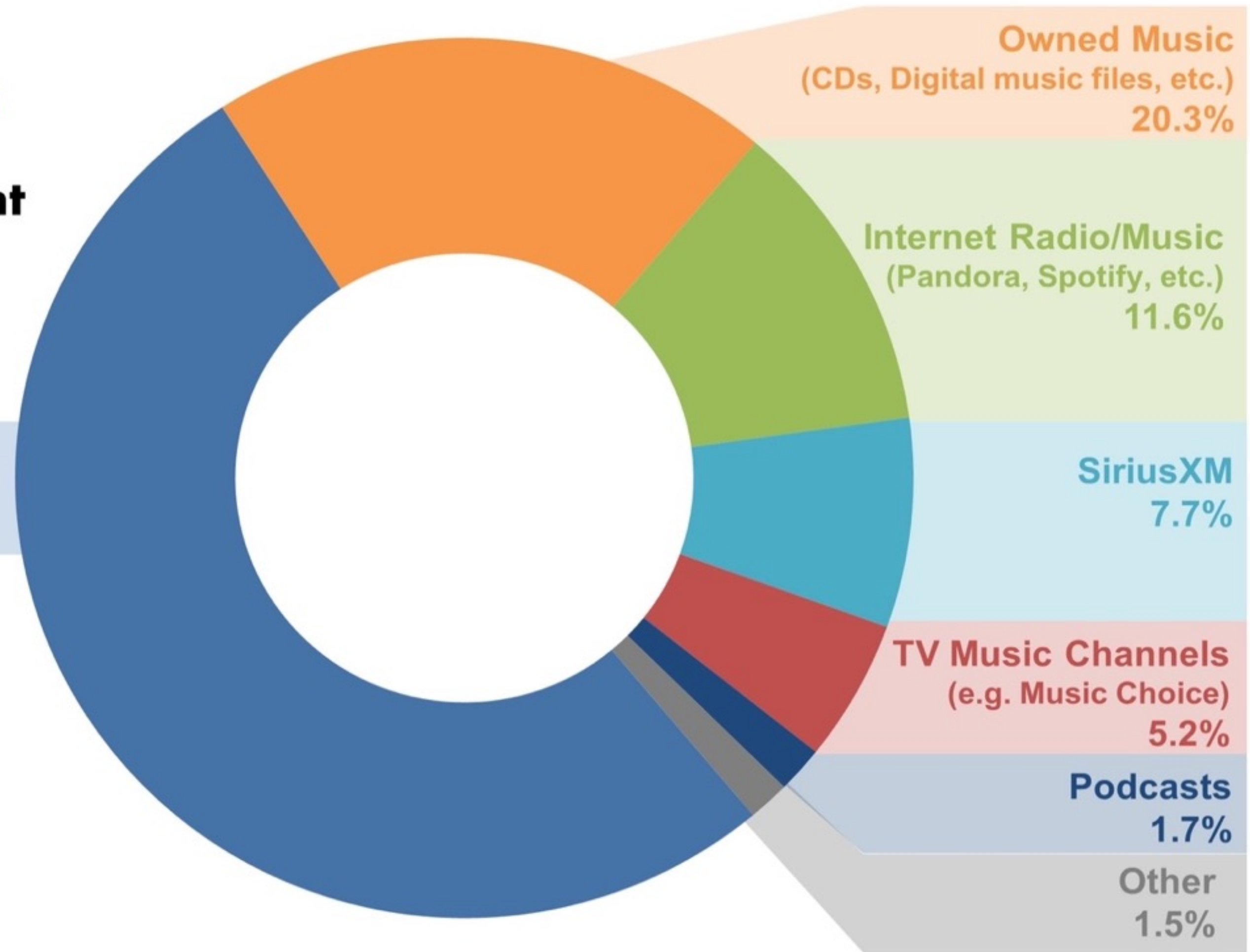
May 2014

Share of Ear

**Americans' Share of Time Spent
Listening to Audio Sources**



AM/FM Radio
52.1%



Source: Edison Research. Americans spend an average of 4 hours and 5 minutes each day consuming audio. This graph represents the share of time spent with each. Based on a nationally representative sample of 2,096 Americans ages 13+ who completed a 24-hour audio listening diary, May 2014. For more information contact info@edisonresearch.com

Share of “Radio Service” Listening

Internet Radio: 13.6%

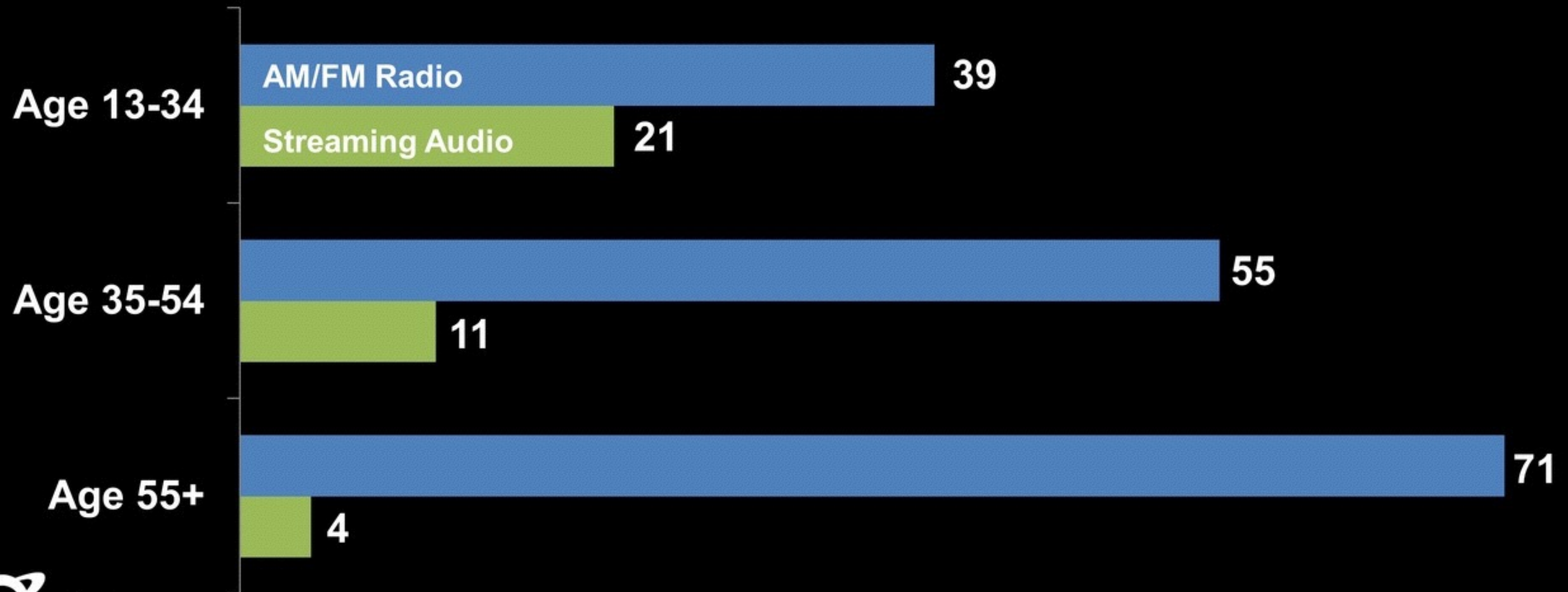
- Pandora: 9.2%
- Other: 4.4%

Satellite Radio (Sirius XM): 11.1%

AM/FM Radio: 75.3%

Share of EarTM

Share of Time Spent Listening to Audio Sources



Classical Music Rising Project Strategic Focus

1. Understanding Classical Music Radio's 21st Century Audiences
2. Awareness and Engagement
3. Digital Strategies and Experimentation
4. Talent Development
5. Revenue and Business Models for the Next Generation of Service

Manage Toward Opportunity

A portfolio strategy:

- Careful stewardship of broadcast assets
- Smart, responsive, interactive services
- Understanding use and value across platforms
- Next generation audience research

Executive Summary

- Nationwide, diary market stations ...
 - Have not seen dramatic listening growth. There has been a slight bump between 2p and 7p
 - Have experienced a similar growth in cume listeners, but AQH growth is considerably more modest, and has been flat in the morning daypart and nearly flat in the midday.
 - *Classical 90.5* has been in AQH and Cume stasis for several years.
- Time spent listening in PPM markets has grown over the past year, while it has declined in diary markets. TSL is typically greater in diary markets, an expected result from diary methodology.
 - *Classical 90.5* has seen recent TSL growth in individual ratings periods, but the long term trend has been negative.

Executive Summary, cont.

- Percentage of Core audience has remained fairly consistent in PPM and diary markets.
 - *Classical 90.5* mirrors this finding.
- Listening to classical music stations in PPM and diary markets is growing in the 65+ demo.
 - *Classical 90.5's* primary age demo has been 65+ for years.
- Unlike news, classical music is able to sustain audience throughout the day nationwide.
 - *Classical 90.5* and *NPR 89.1* also display this listener behavior.

Based on a sample of 26 stations whose schedules consist at least 90% of classical music programming in PPM markets and 113 stations in diary metro markets.
(Mon-Sun 6a-7p schedule.)

New Business

Gene Robinson
AZPM Director of MarComm

Marketing Report



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New Business

Classical Music Marketing Plan

Goal: Raise awareness by publicizing benefits of listening to classical music

Positioning: Classical 90.5 as therapy for heart, body & mind

Placement: AZPM radio & TV

Launch Date: April 2017, coincide with ad in TSO *Music of the Mountains* program book

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New Business

It's a fact: Listening to classical music...

- Makes you happy
- Reduces stress
- Relieves pain
- Increases brainpower
- Boosts memory
- Decreases blood pressure
- Sparks creativity
- Improves productivity
- Helps you sleep

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Q & A

New Business

Jason Katterhenry, AZPM Director, Info Technology

Digital Audience Demographic Report

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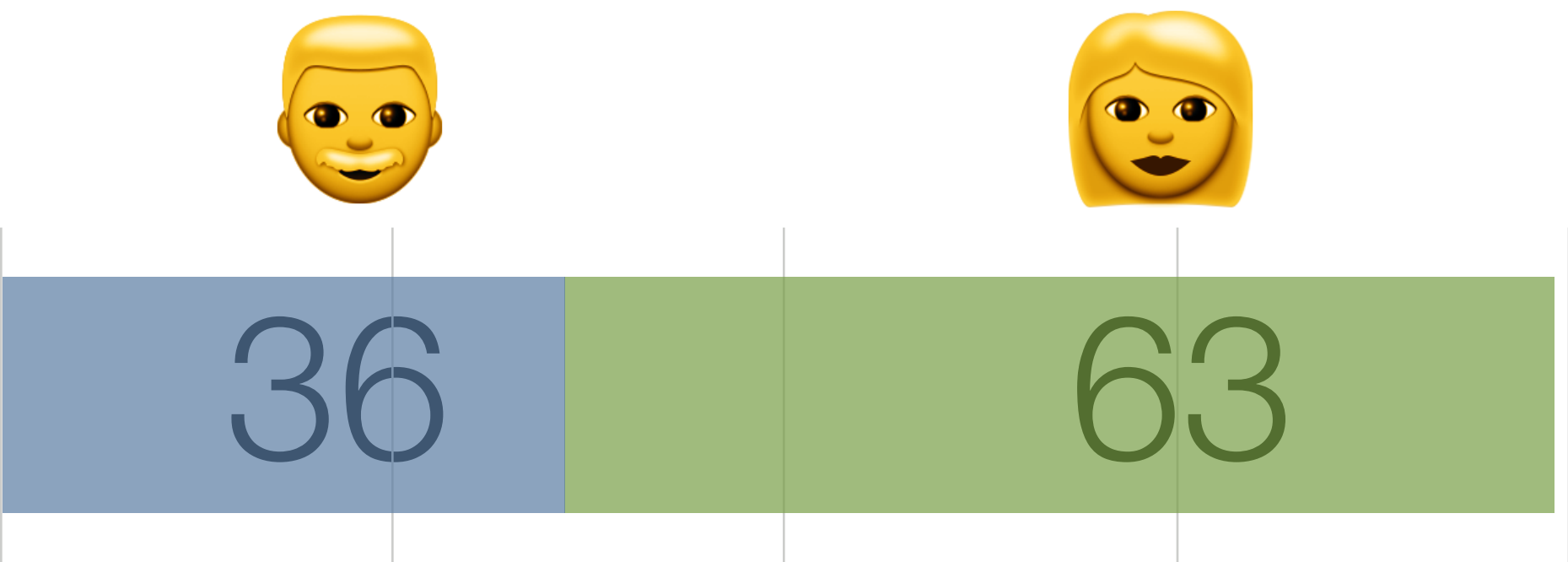
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New Business

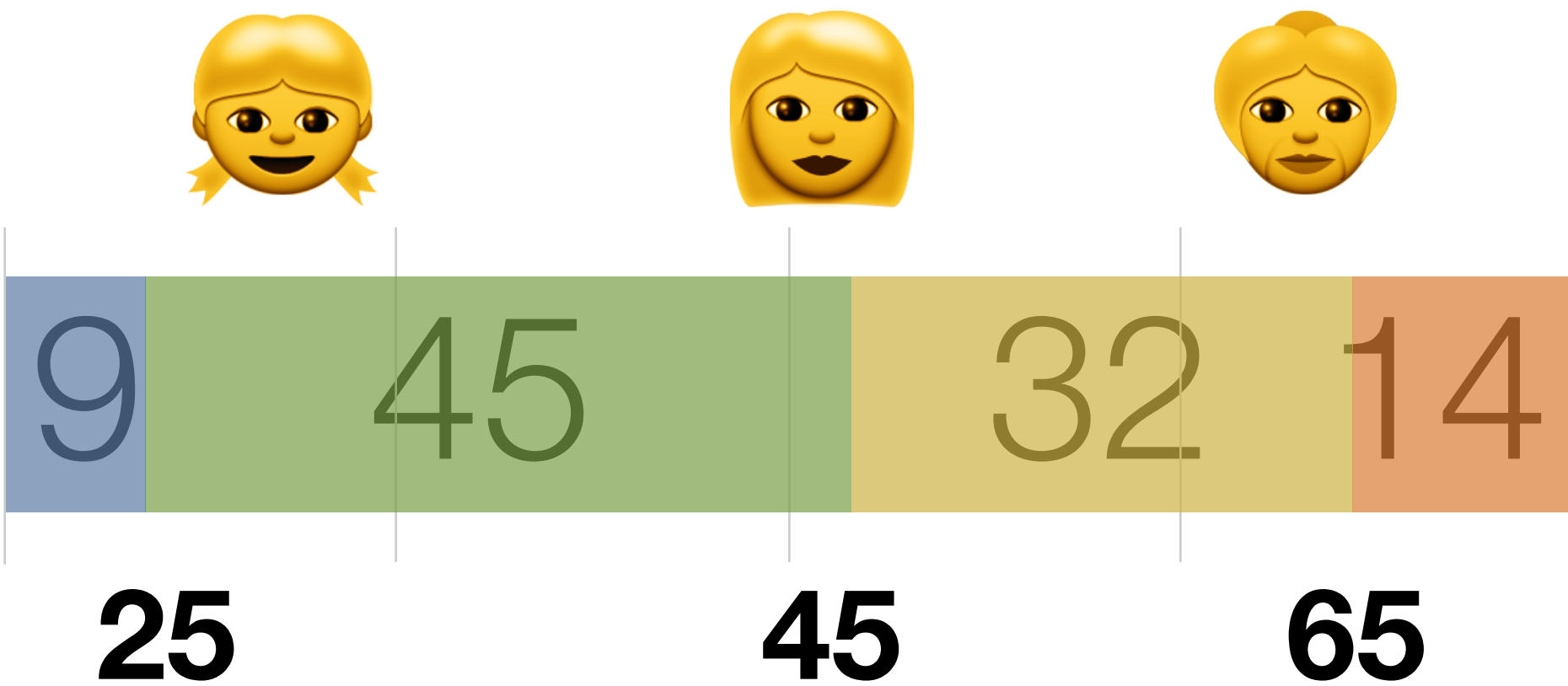
Social Demographics



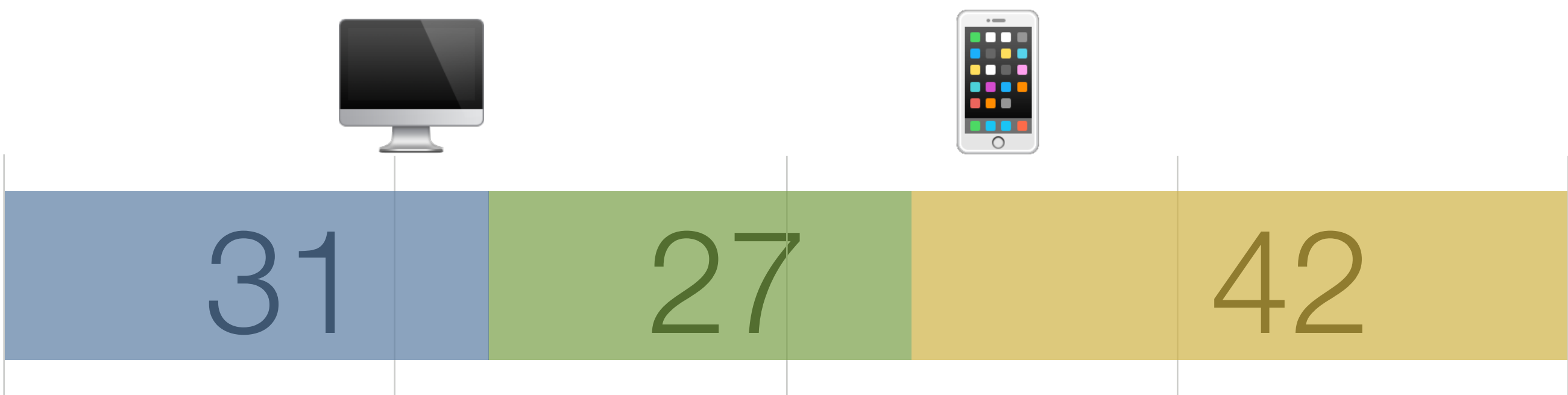
Gender

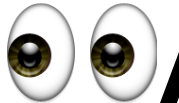



Age



Device



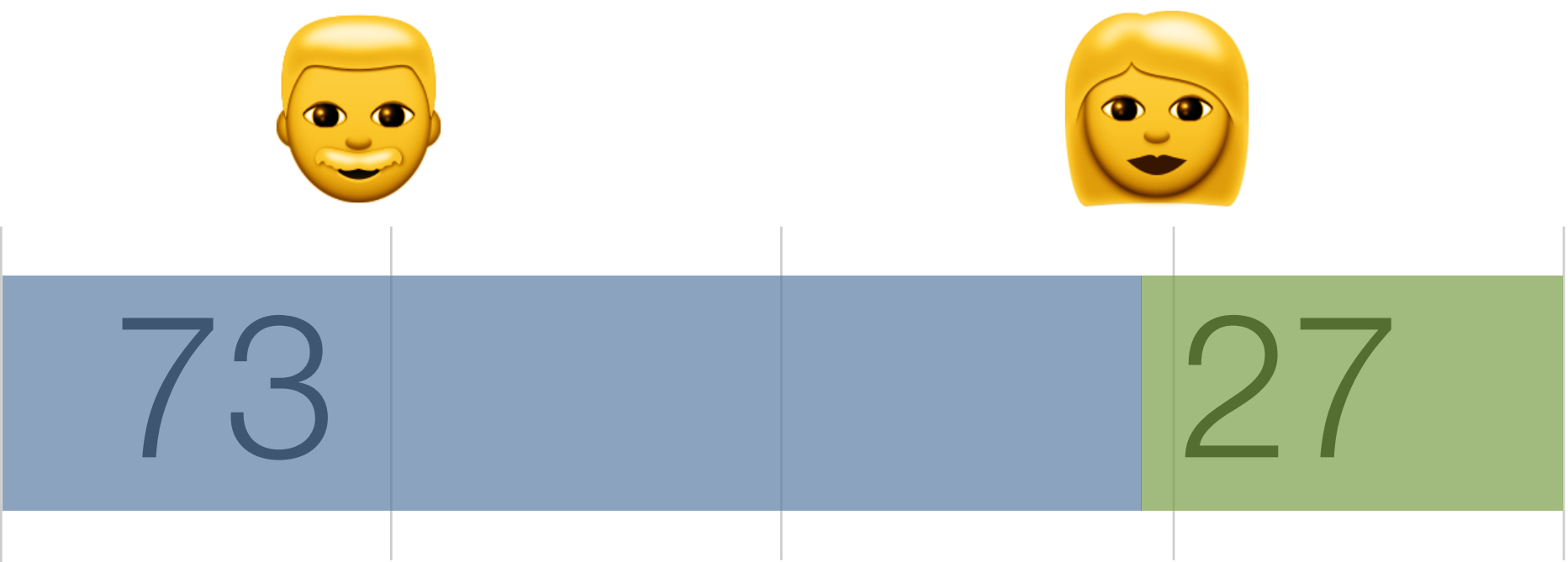
  JUL 17
230,000

New Business

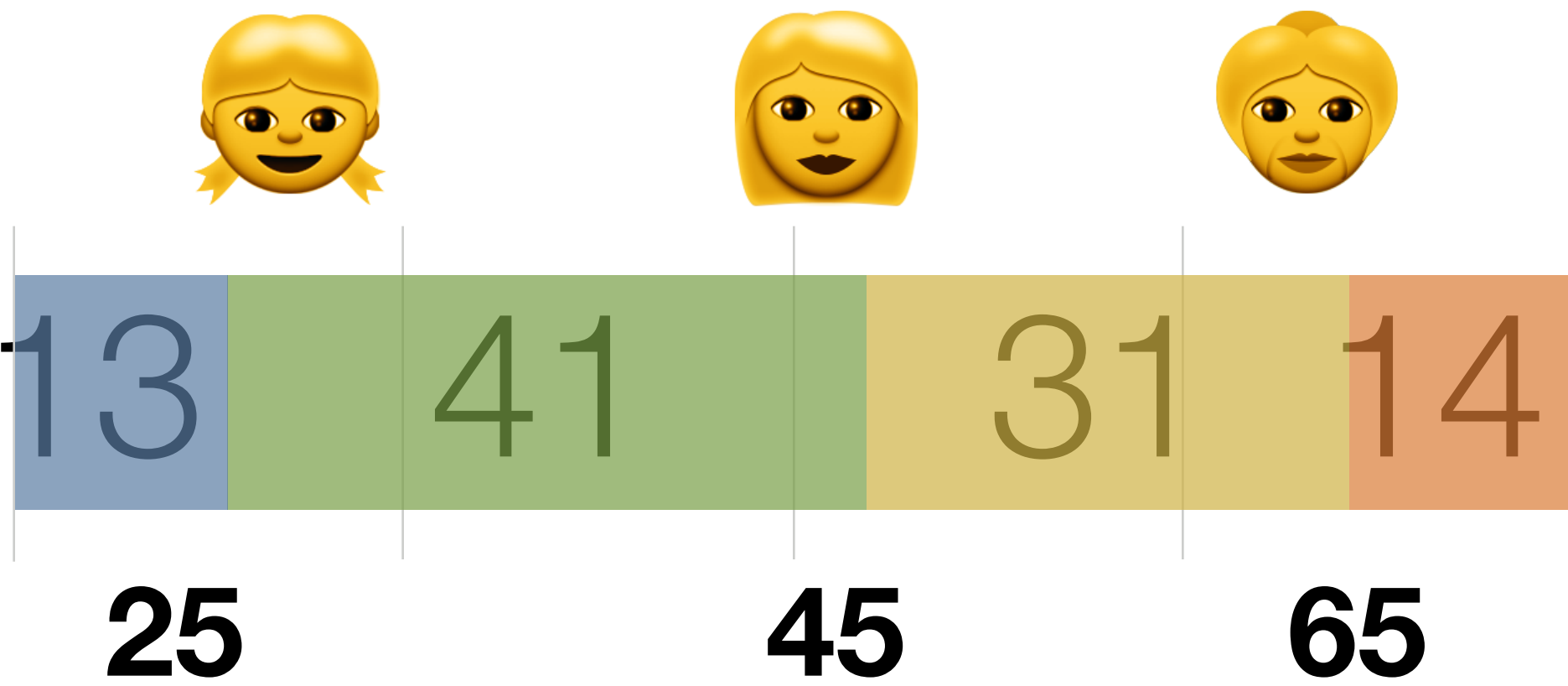
Social Demographics



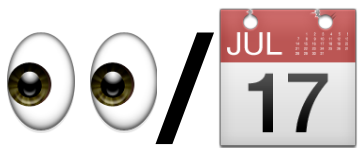
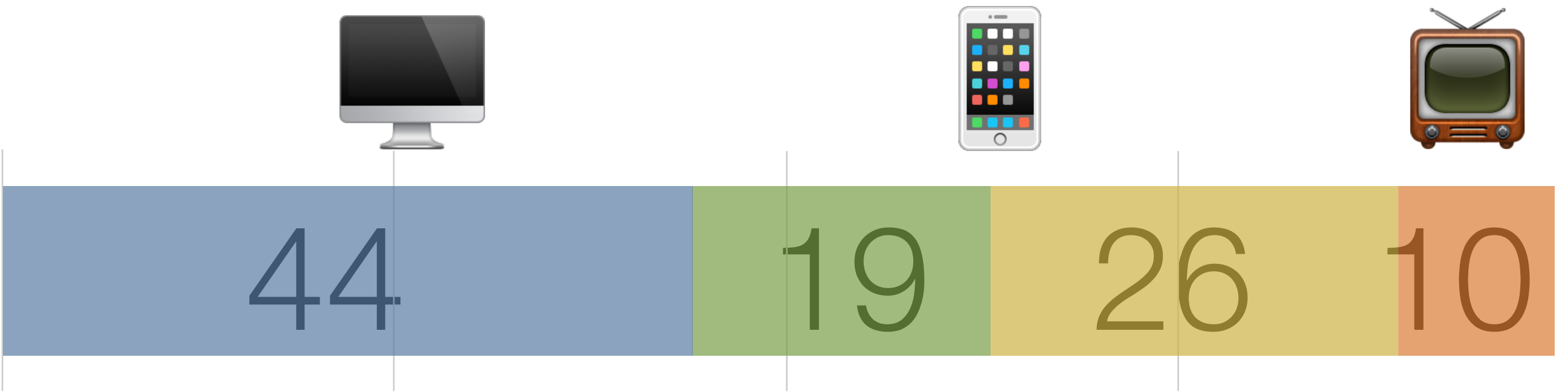
Gender



Age



Device



85,000

New Business

Jack Gibson
Kimberly Heath, CFO

<Discussion Item>

Corporation for Public Broadcasting (CPB)
Funding Update

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Management Report

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Management Report

Audience Engagement

Television

Nielsen Media - January 2017 (vs. Jan. 2016)

Cume (Unduplicated Weekly Audience)

Prime Time - n/c

Whole Week -5%

GRPs (Gross Rating Points)

Primetime - n/c

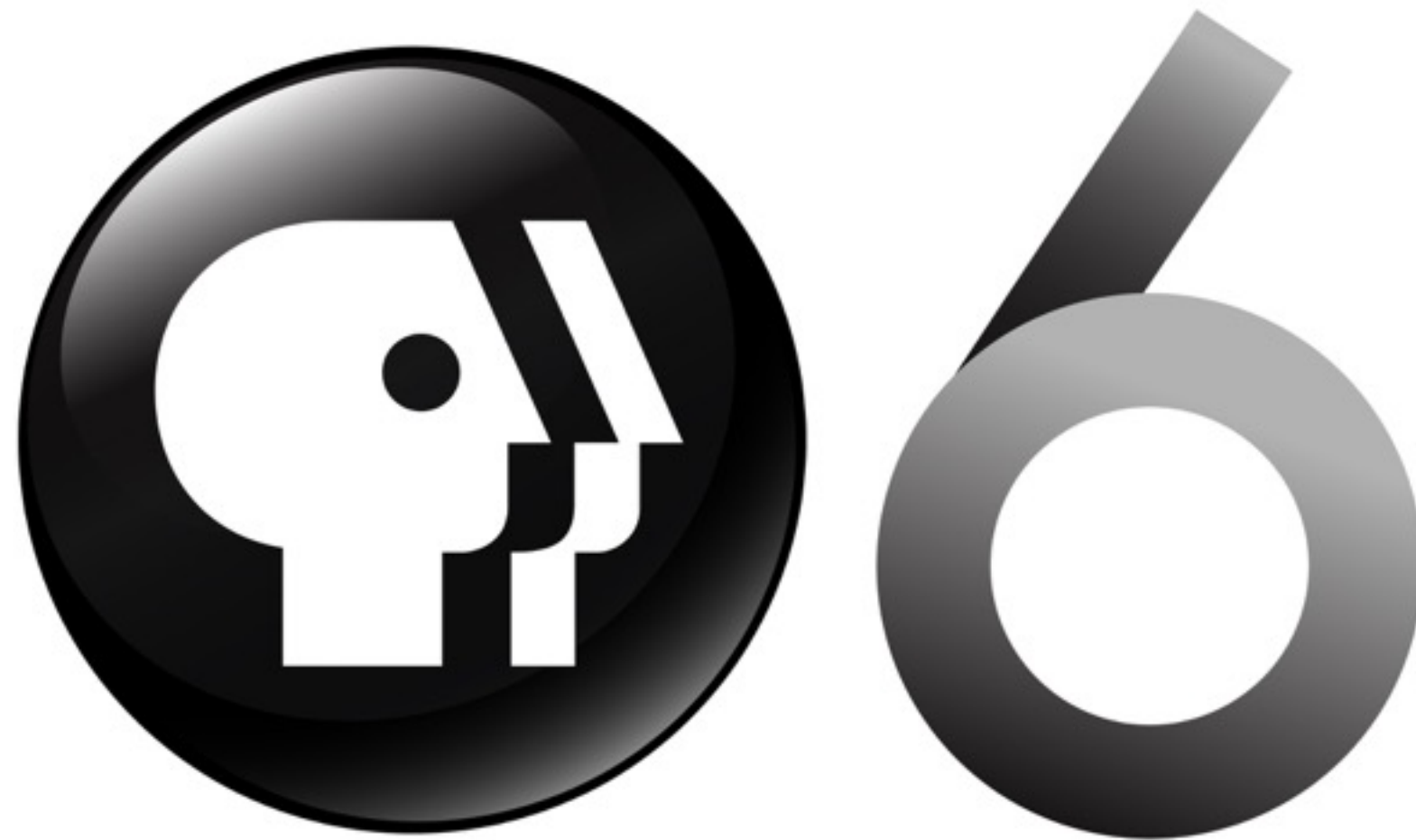
Whole Week +2%

Local Productions (#viewers)

Arizona Illustrated +127.6% (41,740)

Arizona Week +40.6% (10,520)

MetroWeek -5.8% (11,090)



Management Report

Audience Engagement

Radio



Nielsen/Arbitron - Winter 2017

- Reports due mid-April
- Will provide complete report at next CAB Meeting

Classical
90.5 FM 89.7 FM



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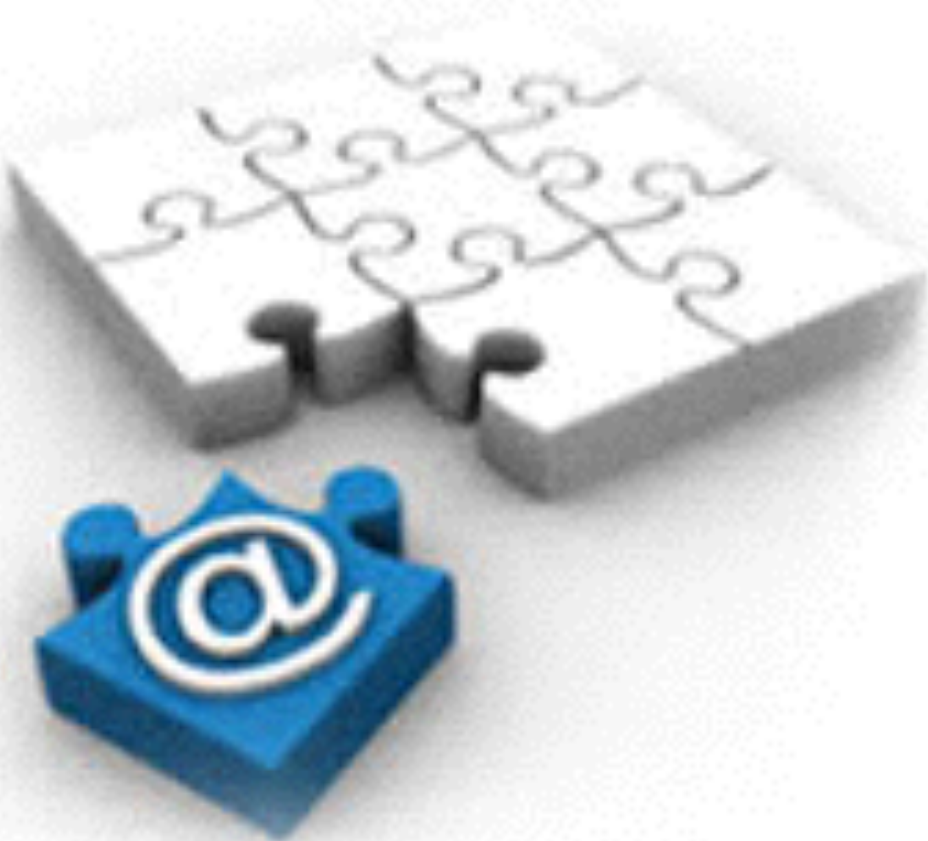
Management Report

Audience Engagement

Online

Winter 2017 **azpm.org** analytics:

<i>Metric</i>	<i>Jan-Feb 2017</i>	<i>%change (from 2016)</i>
Page Views	883,284	-3.12%
Pages per Visit	3.63	-6.16%
Bounce Rate	16.64%	-54.58%



@AZPMnews **Twitter** followers as of February 28, 2017: 11,200 **+14.6%**

@AZPM **Twitter** followers as of February 28, 2017: 1,186 **+186.4%**

Facebook page “Likes”: 16,473 **+99%**



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PBS



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Management Report

Audience Engagement

In-Production

Tucson Remembers: The Vietnam War (w.t.) for September 2017

Filming underway; Companion to Ken Burns 10-pt. series.

One-hour documentary

Extensive Community Outreach - Online



Not Broken for Oct./Nov. 2017

An intimate look at the personal struggles and triumphs of youth living with mental health issues.

Filming continues; Production funding from the Lovell Foundation; Outreach funding and engagement partners sought

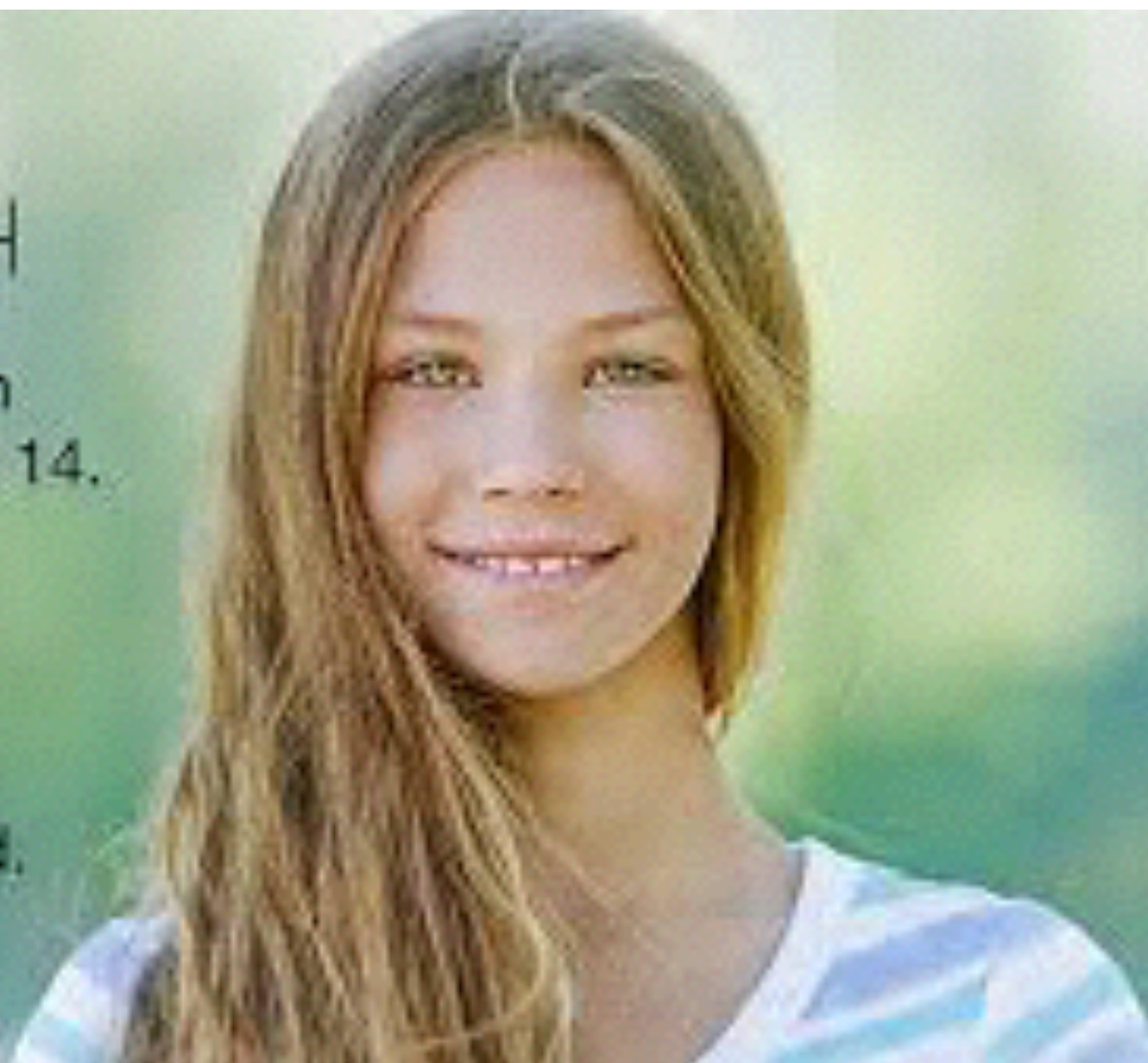
One-hour+ documentary
Extensive Community Outreach

YOUR CHILD'S
MENTAL HEALTH

Half of all mental health
disorders begin by age 14.

75% begin by age 24.

Learn the signs and
get your child screened.



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Management Report

Visibility and Financial Sustainability

Feb. 28 Membership Program Update

Total: \$2,669,692.39 (\$80,462 above 2016)

Budget: \$2,597,366 (2.78% favorable to budget)

#Gifts: 22,824

#New Gifts: 3,174 (13.9%)

March 2017 TV/Radio Membership Campaign

Goal: \$400,000/FY'16 Actual: \$417,256 (-4.3%)

Total #Gifts Goal: 2,500



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Management Report

Visibility and Financial Sustainability

AZPM launching comprehensive news image promotional campaign:

“Trusted. Now More Than Ever.”



- On-air, TV and Radio
- Outdoor Advertising (billboards, transit shelters)
- Print (Arizona Daily Star)
- Possible online advertising

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Management Report

Organizational Culture

Recently Filled Positions

Sr. On-Air Promotion Producer (11/15/16)

On-Air Promotion Producer (11/15/16)

TV Operations Asst/TV Production Asst (PT)

Headcount

Professional Staff: 89

Students: 14

Volunteers: 211

Open Positions

Website Designer/Developer

Administrative Secretary

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Management Report

Organizational Culture

Regional Emmy Award Nominations in Progress

Nancy Montoya featured on *PBS NewsHour*

NPR's Melissa Block visited with news staff

AZPM news staff attended storytelling workshop at NPR national HQ

- Vanessa Barchfield
- Nick O'Gara
- Tony Paniagua

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Management Report

Partnerships

Date(s)	Event(s)	Partner(s)
March 10, 2017	Tucson Festival of Books - Author's Table Dinner	UA/TFOB
March 11-12, 2017	Tucson Festival of Books - UA Mall	UA/TFOB
March 11, 2017	Tucson Festival of Books Major Donor In-home Event	UA/TFOB
March 20, 2017	Preview Screening: <i>The Great War</i>	Loft Cinema
March 27, 2017	Preview Screening: <i>The Great War</i>	UA CCP
April 18, 2017	AZPM Radio - Major Donor Appreciation Event	AZPM Studios
April 26, 2017	AZPM Volunteer Appreciation Event	AZPM Studios
May 4, 2017	AZPM Student Appreciation Event	AZPM
July 2017	National Premiere: <i>In the Americas with David Yetman VI</i>	APT
Aug./September 2017	Preview Screening: <i>Tucson Remembers Vietnam (w.t.)</i>	various
September 2017+	Community Engagement: <i>Tucson Remembers Vietnam</i>	various
September 2017	National Premiere: ORISIS REx	UA LPS/APT



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Management Report

Technology

- KUAS-FM 88.9 construction planning continues.
- Consolidated PMM Joint TV MCR transition efforts continue...
- *ReadyTV/WORLD* share a single broadcast channel. Anticipate a hybrid channel in 2Q2017: *PBS 6+*
- AZPM radio facility renovation are nearly completed. Reception in planning stages for late April with VIPs and major donors.



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Management Report

Q & A

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Other Business

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Other Business

- Other business from the floor.
- Next CAB Meeting:
Thursday, May 25, 2017
11:45a lunch buffet; 12 noon agenda. Location UAF Vine Ave. Annex
- Meeting evaluations will be emailed to you via Survey Monkey.
- Please take **only** first section of agenda book and folder.
All other binder materials are online: <http://about.azpm.org/cab.news>

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Adjourn

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