AUDIENCE 88

A COMPREHENSIVE ANALYSIS
OF PUBLIC RADIO LISTENERS

Issues & Implications

Prepared by:

Thomas J. Thomas and
Theresa R. Clifford

Thomas & Clifford
Takoma Park, MD

Funds provided by:
Corporation for Public Broadcasting

ISBN 0-89776-111-1

CONTENTS

FOREWORD

The fundamental proposition of AUDIENCE 88 is "know your audience." It is an effort to pierce the veil between the broadcaster and the listener, and to capture the clearest possible picture of the people who welcome public radio into their lives.

Our findings give public radio broadcasters, and those with whom they work, a detailed portrait of the public radio audience. Through in-depth reports on *Underwriting*, *Advertising & Promotion*, *Programming*, and *Membership*, we have applied this information to various areas of station operations.

This report takes a step back from day-to-day station work, and explores the broader implications of AUDIENCE 88's findings for public radio's overall growth and development. We have chosen a short list of questions to address, in the hope that clear understanding of major points will provide a context for consideration of the many specific issues public radio will face in the months and years ahead.

As AUDIENCE 88's findings work their way through the public radio system, we find people talking about public radio in a new way, with a different vocabulary. We expect a lasting contribution of this study will be a reshaping of the ongoing dialogue among producers, programmers, development staff, managers, and funders. The new framework is centered on the power of programming, a major change from public radio's focus through the mid-1980's on financial and structural issues. As important, though, AUDIENCE 88 establishes the clear links between programming and the full range of station and system operations.

The key element in that linkage is the concept of programming appeal _ the special attraction that specific programming holds for specific listeners. Appeal is the mechanism through which programming shapes the audience, with a cascade of ramifications for the entire public radio enterprise. Appeal is at the center of this report.

AUDIENCE 88 has been an extraordinary project, a two-year learning exercise focused on the fundamentals of our profession. We are indebted to a number of individuals and organizations who gave us this opportunity. David Giovannoni initiated and directed the project, guided the basic research, and challenged and stimulated our thinking throughout. Linda Liebold brought a wealth of expertise in development and promotion to the AUDIENCE 88 team. Ric Grefé and Ted Coltman of the Corporation for Public Broadcasting secured the funding that made the project possible, and provided continuing guidance for our work. National Public Radio contributed a massive database that was the starting point for our research.

This report is the last in the AUDIENCE 88 series. It should be only the beginning, however, of a better understanding of public radio's audience and greater attention to whom public radio serves.

Thomas J. Thomas
Theresa R. Clifford

Takoma Park, MD
December, 1988

1.
NICHE

Public radio fills a special niche within a broadcasting framework of some 10,000 radio stations. Like all stations, public radio competes for listeners' attention by appealing to a target segment of the audience. By better understanding the appeal of its programming, public radio broadcasters can strengthen their present service, and make better decisions about choices for the future.

America's public radio stations, just over 300 in number, operate alongside more than 9,000 commercial stations that have most of the spectrum space, most of the money, and most of the listeners.

For every public station, the average listener has 30 commercial alternatives from which to choose. In the largest markets, where most listeners live, there are more than 80 radio options.

With this abundance of choices, virtually every American listens to radio. But most Americans actually use less than three radio stations over the course of a typical week.

It is the nature of radio competition that programming appeal determines the capacity of a station to attract listeners. Radio stations target their programming to appeal to an audience segment that will use the service on a regular basis. Stations compete with one another either by identifying audience segments that other stations do not serve or by producing programming that is more appealing to a segment of the audience than the choices offered by other stations.

Dial position, signal availability, promotion budgets, and the number of stations in a market are all significant, but nothing matches the importance of a station's programming in determining its share of a community's audience.

Public radio's current programming exerts an extraordinary appeal to some four million Americans each week, or about two percent of this country's population. These Americans listen to public radio *more than any other station* on the radio dial. Another six million listeners make public radio one of their radio choices during the week.

Even as AUDIENCE 88 has focused on the listeners that public radio serves so well, it has also highlighted the large number of people who do not listen to public radio. Most listeners prefer the programming of a commercial station, taking only as much time with public radio as it takes to decide they really want to listen to something else.

What of these millions who do not listen to public radio. Do these listeners know what they are missing? The fact is, in at least some vague way, most do.

Over time, the tendency to tune around while driving, to switch the dial out of dissatisfaction with another station's programming, a change in the daily routine, conversation with friends about radio, and other such circumstances will bring most every listener to the public radio station for at least a moment.

To the degree that the programming connects in some way with such listeners — appeals to them — they may come back. If the programming fails to strike a responsive chord in some way, however, it may be weeks, months, or longer, before they try again.

For public radio professionals who dedicate their lives to programming that they believe is better than commercial fare, it is difficult to accept that people who don't listen to public radio actually

prefer not just one, but several other radio stations.

It is simply a fact, though, that as long as public radio broadcasts alongside over 9,000 commercial competitors, it can aspire to truly serve only a portion of America's radio listeners. If the public radio system tripled its size and audience, more than 9 out of every 10 Americans would still listen more often to the service of a commercial outlet.

In sum, whatever public radio's aspirations and whatever its accomplishments, its role is to fill a special niche within a larger broadcasting enterprise.

The nature of public radio's niche is in some measure predetermined by factors beyond the immediate control of individual stations — by the terms of noncommercial licenses, by public broadcasting's Congressional charter, by the missions of the licensees. Stations' opportunities are also affected by the programming strategies of other radio stations in their market and by a host of other factors in the environment.

There is also a great deal of choice — in the diversity of the constituencies public radio can elect to serve, in the decentralized control of the enterprise, and in the evolving marketplace for national programming. For these reasons, individual stations will fill somewhat different niches within their respective communities.

Creativity, competitiveness, successful targeting, organizational effectiveness, and other elements under a station's own control clearly make a difference. Some public radio stations serve tens of thousands of listeners while others, under similar circumstances, serve just thousands.

In this context, AUDIENCE 88 has a twofold purpose. The first step, with immediate application, is to clarify who public radio now serves. The more knowledge public radio broadcasters have about the people who are attracted to the formats and programs they present, the more effectively they can serve those listeners' needs and interests. They can be more efficient in promoting programming, more persuasive in asking for listeners' financial support, and take a better case to the businesses that underwrite many of their efforts.

Further, by understanding the relationships between programming decisions and the ways in which listeners are likely to respond to them, public radio can make better strategic choices about the broader configuration of service to the American people, both for individual stations and for the public radio system as a whole.

The first half of this report, Sections 2 and 3, presents AUDIENCE 88's most powerful concept — programming appeal. We begin with an exploration of public radio's distinctive appeal within the broader radio environment, and the different kind of listener this appeal brings to the public radio audience.

We then examine the distinctive appeals of public radio's major formats — information programming, classical music, and jazz. We also discover a special kind of listener at the heart of the public radio audience.

The second half of the report, Sections 4 and 5, applies this analysis to two critical issues that will define public radio's role within the radio enterprise. We first look at audience building, the broad effort to increase the number of Americans whom public radio serves in a significant, important way.

We conclude with a discussion of targeting, the provocative and entwined questions of what service public radio should provide and to whom that service should be directed.

2.
AUDIENCE

The theory of AUDIENCE 88 *is that people to whom one kind of station or programming appeals are different from people to whom that station or programming does not appeal. Public radio's listeners are different from other listeners in their demographics, values, and lifestyles.*

Each moment of radio programming — each piece of music played, each news story reported, each anecdote told by a program host — encourages some people to listen and others to tune away. Sometimes people can articulate quite clearly what it is about a station and its programming that attracts or repels them; sometimes the reasons are more elusive and intangible. Whether the reasons are obvious or not, most people can and do make quick and clear judgments about what they will and will not listen to on the radio. A twist of the dial, a punch of a button — the choice is made.

It takes only a few moments of thought about one's own radio listening habits to understand the basic concept of appeal. There are many stations to which one will listen only the few moments it takes to sense a complete absence of interest, the total lack of *appeal*. There are other stations, perhaps a half dozen or so, that constitute one's personal radio repertoire — that have *some appeal*. And for most people, there are two or three stations that are the favorites and that get most of the listening — that exert a strong appeal.

The Theory of Audience 88

The underlying theory of AUDIENCE 88 — and its most important continuing theme — is that people to whom one kind of station or programming appeals are different from people to whom that station or programming does not appeal. Put another way, different kinds of stations and programming will appeal to different kinds of people. Each programming decision will open opportunities to serve certain kinds of listeners and impose constraints on ever reaching others.

Programming, the theory continues, causes and defines audience. By shaping programming content, form, and style of presentation, a station will shape its audience. The more thoroughly broadcasters understand this relationship, the better they can control the nature and size of their audience.

Further, with better knowledge of the kinds of people to whom the station and its programming is appealing, broadcasters can better plan and implement the range of activities that are keyed to the listening relationship, from advertising to promotion to membership campaigns.

AUDIENCE 88 has emphatically confirmed the theory. Among the central findings are these:

- Listeners who choose public radio are significantly different from those who do not.
- Listeners who make a public radio station their favorite are different from those who just sample its programming.
- These differences extend to the kinds of listeners who are attracted to each of public radio's distinctive formats and services.
- All of these differences are reflected in the extent to which listeners consider public radio important and worthy of their financial support.

This chapter explores the appeal of public radio within the broader radio environment and the different kind of listener that public radio attracts.

A DIFFERENT KIND OF LISTENER

AUDIENCE 88 affirms several *demographic* characteristics of public radio listeners that have been reported in prior studies. Education is at the top of the list. Public radio listeners are significantly better educated than the U.S. population as a whole. People who have attended college are more likely to listen to public radio than other Americans. The further people pursue their education, the more likely they are to pursue public radio.

This educational attainment correlates highly with income and profession. People with a household income over $25,000 are more likely to listen to public radio; those with incomes below $25,000 are less likely to do so. Over half of public radio's listeners hold professional, technical, managerial, and administrative positions. Public radio listeners are concentrated in the 35 to 44 year old bracket — America's best-educated age group.

Looking beyond demographics, AUDIENCE 88 has broken new ground by developing *values and lifestyle (VALS) profiles* of public radio listeners. These profiles were ascertained through a series of questions and demographic indicators developed by the Stanford Research Institute and administered as part of the AUDIENCE 88 questionnaire.

A particular values and lifestyle personality type — Inner-Directed, Societally Conscious — has emerged as an extraordinarily powerful predictor of public radio use. These people are concerned about society as a whole, have a strong sense of social responsibility, and act on their beliefs. They are

AUDIENCE DIVERSITY

AUDIENCE 88 focuses on a few listener traits — especially education, age, and values and lifestyle characteristics — that are powerful predictors of listening to public radio programming. These characteristics are emphasized because they are useful in explaining behavior, not because they best describe public radio's listeners as individuals.

We have found, however, that the emphasis on shared traits can create the quite inaccurate sense that all public radio listeners are alike.

A characteristic may be useful in describing a group of listeners, to public radio generally or to a particular program or format. But that does not mean that *all* public radio listeners share that characteristic.

As a group, public radio's audience is remarkable for its level of educational attainment. But this does not mean that *all* listeners are well educated. While 85 percent of the weekly audience have attended at least one year of college, 15 percent have not; indeed, 3 percent have not graduated high school. These are not children: AUDIENCE 88 studies only listeners 18 years old or older.

Further, even when listeners have one characteristic in common, there are many ways, documented by AUDIENCE 88, in which they are still a diverse group of individuals.

While 9 in 10 (91%) AUDIENCE 88 respondents are white, 6 percent are black, 2 percent are Asian, and 1 percent is Hispanic. Public radio's audience is half (51%) male, half (49%) female.

Listeners also express great diversity in the ways they describe themselves. For instance, half (52%) of the individuals in the weekly cume consider themselves middle class; 36 percent say they are upper middle or upper class; and 12 percent think of themselves as lower or lower middle class.

Politically, almost half (46%) of the individuals in the weekly audience consider themselves liberal; 26 percent think of themselves as middle of the road; and 28 percent say they are conservative.

It is crucial for the reader to distinguish between AUDIENCE 88's segmentation analysis — which by its nature focuses on the similarities of listeners — and stereotypes and cliches.

interested in arts and culture, enjoy reading and the outdoors, and watch relatively little television. They are only 11 percent of the U.S. population; they are 41 percent of the public radio audience.

As we draw these demographic and psychographic portraits of listeners, it is important to remember that we are highlighting traits that are most useful in *distinguishing* listeners from nonlisteners. It would be a serious mistake to conclude that these characteristics *determine* public radio listening.

There are millions of Americans who share the traits of public radio listeners but who don't listen. For every person who went to graduate school who does listen to public radio, there are two more who don't. For every Societally Conscious public radio listener, there are four Societally Conscious people who choose other stations.

AUDIENCE 88 is, in effect, building a continuum. At one end are people who are most "public-radio-like"; they have a number of traits in common. At the other end are people with virtually no connection to public radio; they may share one or more characteristics with public radio listeners, but as a group they are less "public-radio-like."

This continuum emerges clearly when we segment listeners by *utiligraphics* — how they use radio in general and public radio in particular.

We first determine whether public radio is a listener's favorite — whether he or she listens to a public station as much as, or more than, any other station. We call those who do core listeners. If some other station is their favorite, we place them in the fringe audience.

A second test is how much time a person actually spends listening to a public station, favorite or not. People who listen six hours or more in a week are called heavy listeners; those who listen less than six hours a week are light listeners.

The two tests, together, yield AUDIENCE 88's four utiligraphic segments:

Heavy core — A public radio station is their favorite, and they listen to it six hours or more a week.

Light core — A public radio station is also their favorite, but they listen less than six hours.

Heavy fringe — Another station is their favorite, but they still give public radio six hours or more of listening.

Light fringe — Another station is their favorite, and they give public radio less than six hours of listening per week.

	Percent of Listeners	*Percent of Listening*
Heavy Core	27.8	66.2
Light Core	9.3	4.4
Heavy Fringe	11.7	14.6
Light Fringe	51.3	14.8

Note that the heavy core listeners, only a little more than a quarter of the audience, account for two-thirds of all listening to public radio. In contrast, light fringe listeners, who make up half of public radio's weekly listeners, account for less than 15 percent of all listening.

By searching for distinctions along the continuum from light fringe to heavy core, we can further sharpen our knowledge of the public radio audience. The core listeners are the key. These are clearly the people for whom public radio has its greatest appeal.

As we move toward public radio's core listeners, the Societally Conscious personality profile and a person's education take on even more descriptive power. Over half of public radio's heavy core audience is Societally Conscious, compared to a third of the light fringe. Educated Americans are not only more likely to listen to public radio, they listen longer than others (heavy) and are more loyal (core). Over 70 percent of public radio's heavy core listeners have graduated college, and nearly half (46 percent) went on to graduate school!

In sum, while public radio serves millions of Americans from all walks of life, it speaks in an especially compelling way to a certain kind of listener. We see these people most clearly in the core audience, but they shape the overall audience as well: Inner-Directed, Societally Conscious, highly educated, professionally employed, fairly well-off financially, and entering their middle years.

WHOSE AUDIENCE?

The AUDIENCE 88 database is built on the foundation of National Public Radio's Public Radio Audience Profile (PRAP), an annual study of the audience for programs and formats carried by NPR member stations. NPR's PRAP system, which represents an annual investment of over $75,000, was made available to AUDIENCE 88 at no cost and made this study possible.

The PRAP system is representative of NPR member stations, not the entire public radio system. When AUDIENCE 88 data were collected, 35 of the 288 radio stations supported by the Corporation for Public Broadcasting were not members of NPR. By 1988, the numbers had grown to 311 CPB-qualified stations, of which 59 are not members of NPR.

Many of AUDIENCE 88's findings apply to all public stations, whether members of NPR or not. Concepts such as appeal, segmentation, and targeting are fundamental to the radio medium in this country. Findings about the appeal of basic kinds of public radio programming — information, classical music, jazz, drama, children's programming — should also hold up regardless of the network affiliation of the station on which such programming is heard.

At the same time, it is important to recognize that there are some significant distinctions between those stations that are members of NPR and those that are not. To the extent that these differences result in different programming, they are also likely to make for different kinds of listeners.

Most NPR stations are licensed to universities and colleges (65 percent) or state and local government (10 percent). In contrast, two-thirds of CPB-qualified stations that are not members of NPR are licensed to independent, community-based organizations. This difference in licensee type is reflected in different missions and goals, different target audiences, and different programming.

Of the some two dozen CPB-qualified stations controlled by minorities and primarily targeted for minority listeners, most are not members of NPR.

Almost all of the CPB-qualified stations that are not members of NPR serve communities with one or more NPR member stations. These stations consciously seek to provide programming that is distinct from the NPR member stations.

Finally, AUDIENCE 88 demonstrates that its sample audience is dramatically shaped by the appeal of NPR's news magazines, programs that are not available to nonmember stations.

In short, there are many reasons to believe that listeners served by stations that are not members of NPR are different from the NPR station audience. Because of this, AUDIENCE 88 most certainly understates the diversity of the service that public radio provides to the American people and the diversity of the listeners who respond to it.

We believe any future national study of public radio listeners should include a broader station sample.

We must also consider, though, that there are as many differences among NPR members as there are between NPR members and other public stations — and many linkages that transcend membership. An NPR jazz station may have more in common with another, nonmember jazz station than with an NPR member classical music station.

In sum, when AUDIENCE 88 refers to the public radio audience, the reader must remember that the reference point is the audience for NPR stations. But lest we miss the forest for the trees, it is equally important to remember that those things public radio stations have in common, and that set them apart from all other radio broadcasters, are generally far more important than the distinctions within public radio itself.

3.
PROGRAMMING APPEAL

Public radio's different formats generate distinctive appeals. By using several methods of audience analysis, we can identify different kinds of listeners who are attracted to different formats. AUDIENCE 88 *identifies a particular listener type, the mixed format listener, that is especially significant in shaping the day-to-day audience and the level of local financial support.*

Public radio is not a format. The 72 stations studied for AUDIENCE 88 present a wide range of programming, including information, classical music, and jazz — the three dominant program types — as well as folk music, drama, children's programming, and others. Most stations devote the overwhelming majority of their schedule to two, or perhaps three, such programming types. Some are more eclectic.

The portrait of listeners in the preceding section reflects the combined appeal of all these formats and programs. While there are overlaps among the groups of people attracted to each of public radio's primary services, there are also significant differences. Each has its distinctive appeal.

In this section, we shift the focus to those factors that distinguish listeners to one public radio format from listeners to another public radio format. To understand better the appeal of different programming on public radio, AUDIENCE 88 developed several analyses of the relationships between listeners and program types:

- *Format listeners* — By looking at the *cumulative audience* for a format, we give equal weight to each of the format's listeners.

- *Format listening* — By looking at the *average quarter hour audience* for a format, we give more attention to the balance of people listening at any one time.

- *Format-dominant listeners* — By dividing listeners according to their *favorite public radio format*, we isolate each format's distinctive appeal.

Appeal to Listeners: The Cumulative Audience

The AUDIENCE 88 *Underwriting* report presents a thorough analysis of the cumulative audience for each of public radio's principal formats and programs, highlighting those variables most likely to interest prospective underwriters: age, education, occupation, income, geodemographics, and VALS segment.

The cumulative audience (or cume) for a format or program is just like the cumulative audience, for a station — it is the total number of people who listen during the survey period.

Cume numbers are most often used to report *how many* people listen — to a station, a format, or a program. These numbers are also the most common basis for describing the *composition* of an audience (e.g., 49 percent of public radio listeners are women). This information is important in many respects but, by itself, provides only limited guidance about appeal.

As used in AUDIENCE 88, appeal is not synonymous with popularity. Therefore, knowing how many people listen is not, in itself, a measure of appeal. Opera is unpopular with most public radio listeners; it has a relatively small cume as a format. But opera has a pronounced, identifiable appeal for the audience that does listen.

Composition of an audience is a better indicator of appeal than size, especially if one can place that information in context, such as through comparison to other stations, formats, or programs.

For example, 31 percent of public radio's jazz listeners are 25 to 34 years old. One sees the strong appeal jazz holds for this group when one learns that people who listen to public radio's jazz are over 20 percent more likely to be in this age group.

By concentrating on the comparative context, cumulative audience analysis provides AUDIENCE 88's first glimpse at some of the critical differences among major program elements.

Data for format listeners reveals clearly, for example, that information programming attracts public radio's best educated, most affluent, and most Societally Conscious listeners. Jazz programming appeals to younger, more Outer- Directed listeners. Classical music's appeal seems to track closely with information programming; the key differences are that classical listeners are somewhat older, a little less educated, a little less affluent.

The broad reading of appeal that can be gleaned from cumulative audience analysis is an important starting point, but the picture is in soft focus. In cumulative measures, all listeners count the same, whether they listen a little or a lot. The impact of those to whom the appeal of a format or program is strongest is blurred by the many occasional listeners in the mix.

To gain a more precise understanding of the different appeals of public radio's various programming elements, we need to look beyond listeners to patterns of listening.

Evaluating Listening: The AQH Audience

The AUDIENCE 88 *Programming* report sharpens our understanding of the differences among public radio formats and programs. Like *Underwriting*, this report tracks the audience for each of public radio's major formats and programs. This time, however, the basis of analysis is the average quarter-hour audience (AQH) rather than the cumulative audience.

AQH reflects the composition of the audience at any one time; it thus yields an audience portrait that differs from that developed using the cumulative audience. Because people who listen a lot are more likely to be listening at any given time, public radio's heavy listeners make up the bulk of the AQH audience.

Looking at public radio overall, heavy core listeners are just a little more than a quarter of the cumulative audience. But this group constitutes two-thirds of the audience during an average quarter hour. Each format has its own heavy core listeners, who will be a fraction of the cumulative audience for the format but a major portion of that format's AQH audience.

On the assumption that those people who listen a lot to a particular format or program are those to whom that format or program has a strong appeal, AQH analysis of formats and programs gives a better perspective on the relative appeal of these public radio programming elements.

The *Programming* report's AQH analysis highlights a short list of variables — age, education, and VALS (values and lifestyle) — that best differentiate the listeners to public radio's various programs and formats. Table 31 on the opposite page summarizes these findings.

The *Programming* report also analyzes patterns of affinity among the appeals of public radio's programming elements. All public radio programming appeals to highly educated listeners. All public radio programming has a strong appeal to Inner-Directed, Societally Conscious listeners. By carefully scrutinizing the patterns in the AQH audience, however, some important distinctions among the major formats begin to appear.

The biggest difference in appeal among the three dominant public radio formats is age, but there are also important differences in VALS types. In simplest terms, information and classical programming share more affinity with each other than either does with jazz.

The AQH-based analysis presented in the *Programming* report takes us another major step forward in understanding the distinctive appeals of public radio's major formats and programs — both their affinities and their differences with respect to each other. At the same time, it is possible to make still sharper distinctions among the appeals of the different formats and programs on public radio.

Appeal: Formats and Listener Types

Now that we have examined the two relationships, *listeners* to formats and *listening* to formats, our final step is to examine the core of each format's audience, where the format's appeal is strongest.

In Section 2, we described AUDIENCE 88's use of utiligraphic segmentation to understand the overall appeal of public radio. AUDIENCE 88 identifies core public radio listeners, whose favorite station is a public station, and fringe listeners, who spend most of their listening time with another outlet. The core listeners give the best reading of public radio's appeal.

We can apply the same analytic approach to the listeners of specific formats and programs. Within the overall public radio audience, there are those listeners for whom information programming, for example, is their favorite format — they use it more than any other public radio format — and they are the information format's core audience. Information listeners who use some other format more are in the information format's fringe audience.

By examining a format's core listeners, we should get the clearest perspective yet about that format's appeal.

The utiligraphic analysis of overall public radio listening involved a single variable — public radio use. To develop a similar analysis for the several dominant formats heard on public radio requires some modification of the approach:

- Rather than employ all four utiligraphic segments used for overall public radio listening — core and fringe, light and heavy — we took the simpler approach of identifying listeners by their favorite format.

- Recognizing that there may be important differences between those listeners whose listening is dominated by use of a single format and those who make heavy use of two or more formats, we created a "mixed format" category.

- To keep the analysis statistically reliable and understandable, we focused on public radio's three most widely used formats — information, classical music, and jazz.

Table 31. Composition of Program Services. Percent of each service's AQH audience in each VALS, education, or age segment. Programming designed to serve demographically-defined audience segments — Hispanics, blacks, and the elderly for instance — is folded into the "Target" service. Based on 1986 programming.

	Total	ATC	Classical	Drama	Info	Jazz	Kids	ME	Opera	PHC	Target
Need-Driven	2.4	1.7	1.2	.0	1.7	2.9	.0	.7	1.4	1.3	3.6
Survivor	1.9	1.5	.9	.0	1.4	2.2	.0	.6	.7	.9	3.6
Sustainer	.5	.2	.3	.0	.3	.7	.0	.1	.7	.4	.0
Outer-Directed	40.3	35.1	40.1	37.6	38.8	43.4	43.0	36.7	50.8	37.7	45.4
Belonger	13.8	10.1	13.7	10.5	12.6	13.3	11.4	9.9	20.3	11.4	16.6
Emulator	3.0	2.5	2.5	7.3	2.8	3.4	2.5	2.2	2.5	2.4	3.8
Achiever	23.5	22.5	23.9	19.8	23.4	26.7	29.1	24.6	28.0	23.9	25.0
Inner-Directed	57.5	63.2	58.6	62.5	59.6	53.6	57.0	62.5	47.9	61.0	51.0
I Am Me	3.3	3.1	2.3	5.8	3.1	3.6	2.5	2.2	3.3	3.0	7.4
Experiential	7.6	7.4	6.5	8.3	7.6	8.5	12.7	8.5	5.6	6.9	6.1
Societally Conscious	46.6	52.7	49.8	48.4	48.9	41.5	41.8	51.8	39.0	51.1	37.5
Did not Graduate H.S.	2.8	1.9	1.2	5.5	2.0	4.1	1.9	1.1	1.9	1.3	4.5
Graduated High School	9.4	6.8	8.5	6.2	8.4	8.5	11.0	6.4	12.3	6.7	8.7
1-3 Years of College	22.4	19.7	20.4	26.9	22.1	24.2	20.7	21.3	20.7	20.9	23.3
Graduated College	24.7	26.4	25.3	26.7	25.0	25.6	26.8	25.4	26.0	27.3	25.7
Graduate School	40.6	45.2	44.5	35.8	42.5	37.7	40.2	45.7	39.1	44.1	37.9
18-24 Years Old	5.3	5.7	3.6	5.3	5.2	7.0	2.5	4.6	4.8	3.3	7.3
25-34 Years Old	24.6	25.5	21.5	25.0	24.6	25.5	15.2	27.8	8.8	25.4	19.5
35-44 Years Old	24.7	25.6	25.2	25.7	25.7	23.1	36.7	27.9	14.2	25.6	22.8
45-54 Years Old	15.1	15.8	16.2	16.6	15.3	16.2	16.4	14.0	21.0	16.6	19.8
55-64 Years Old	14.0	13.0	14.0	17.4	13.1	14.4	17.7	12.3	19.8	10.7	9.5
65 Years Old or Older	16.4	14.4	19.5	9.9	16.1	13.8	11.4	13.3	31.4	18.4	21.2

This approach yields four distinct types of listeners:

1. *The information-dominant listener* — a person who listens to information programming more than any other format and who listens to an hour or less per week of either classical or jazz. Information-dominant listeners comprise 32 percent of public radio's weekly audience.

2. The classical-dominant listener — a person who listens to classical music programming more than any other format and who listens to an hour or less per week of either information programming or jazz. Classical-dominant listeners comprise 25 percent of public radio's weekly audience.

3. The jazz-dominant listener — a person who listens to jazz programming more than any other format and who listens to an hour or less per week of either information programming or classical music. Jazz-dominant listeners comprise 10 percent of public radio's weekly audience.

4. The mixed-format listener — a person who spends more than an hour per week with two or more formats. Mixed format listeners comprise 24 percent of public radio's weekly audience.

Ninety-one percent of the listeners in the AUDIENCE 88 sample (accounting for over 97 percent of the listening) fall into one of these four categories.

The following portraits highlight the key findings that emerge from our format-based analysis for each of the four listener types.

Information-Dominant Listeners

Information programming is public radio's biggest audience draw. The audience is largest when NPR's news magazines are on the air. The size of the audience is a function of both the news magazines' inherent appeal and their scheduling during periods of peak radio use.

The appeal of public radio's information programming, both national and local, is clearly central to the appeal of public radio as a whole. Information-dominant listeners are the largest of the three format-dominant groups.

These Inner-Directed, Societally Conscious people are concentrated in and around the 35-to-44-year-old bracket. They are better educated than their classical- and jazz-dominant counterparts. They are more likely to work full-time. They tend to hold professional, technical, or managerial positions.

With their advanced education and high-level jobs, information listeners are public radio's most affluent. Their household incomes average 32 percent higher than jazz listeners and 14 percent higher than classical listeners. They characterize themselves as liberal in their political outlook.

Although they have come to public radio more recently than their classical counterparts, these people are active public radio listeners. They tune in to public radio more times per week, on more days, than music-dominant listeners.

Information-dominant listeners spend more time with their public radio station than classical and jazz-dominant listeners, and are more loyal to it. For one-third of the group, public radio is their favorite station.

A slightly greater percentage of information listeners than classical listeners are members of their public radio station; they are much more likely to be members than jazz-dominant listeners.

Classical-Dominant Listeners

Public radio's classical music is the mainstay of most stations' daily schedule, accounting for more broadcast hours than any other format. It attracts an audience that is loyal to the station over the course of the week — and that has been loyal to the station over the years.

Classical-dominant listeners are older than listeners to other formats. While they are much more likely than the U.S. population to be Inner-Directed and Societally Conscious, compared to other public radio listeners they are more Outer-Directed, with many falling in the Belonger VALS type. They are well educated, but they have less formal education than information-dominant listeners.

The household income of classical-dominant listeners is about halfway between that of information-

dominant listeners and jazz-dominant listeners; information-dominant listeners are more affluent, and jazz-dominant listeners are less affluent. Classical-dominant listeners are more likely to consider themselves politically conservative.

The classical-dominant listening pattern appears to be one of tuning in to public radio a few times a week and then listening for substantial periods of time. Classical listeners spend less total time with their public radio station than jazz and information-dominant listeners, although they are more loyal to the station than jazz listeners.

They are slightly less likely to be members than information-dominant listeners, but much more likely to be members than jazz-dominant listeners.

Jazz-Dominant Listeners

Jazz is less widely available on public radio than classical and information programming. The national audience is smaller, and findings are more strongly influenced by circumstances of individual stations.

Listeners of all types are concentrated in the audiences of a small number of very successful stations, but the jazz audience is more concentrated than most. Of the 72 stations in the AUDIENCE 88 sample, 6 stations (8 percent) account for 60 percent of the jazz-dominant listeners.

On average, jazz-dominant listeners are younger than information or classical listeners; they are the newest additions to the public radio audience. Like classical listeners, they are decidedly more Outer-Directed than information listeners. Also like classical listeners, there is a substantial complement of Inner-Directed people in the jazz audience. However, Inner-Directed jazz listeners are less likely to be in the Societally Conscious group than their classical counterparts.

Jazz listeners are more likely to be working full-time than classical listeners. While jazz-dominant listeners are more likely to work in professional and technical jobs than any other occupation, they are more likely than other public radio listeners to be found in clerical, crafts, and machine operator positions. They have the lowest household incomes of any public radio group. They describe their

JAZZ NOTES

In studying jazz listeners, we found signs of two distinct groups, one decidedly younger and one older. These two groups become increasingly apparent as we move from cumulative audience to AQH audience to jazz-dominant listeners.

Initially, we speculated that these two groups reflected different kinds of jazz programming on public radio. Younger listeners might tune to more contemporary work and older listeners might search out more traditional fare and "specialty shows" featuring such repertoires as classic jazz, Dixieland, or ragtime.

In fact, the age distinction within the jazz audience is more a matter of the context in which jazz appears on different public radio stations.

Some stations present jazz primarily as a late night or overnight service. During these hours, the radio audience is significantly younger. The audience for any programming aired at this time reflects that.

Stations that present jazz as their full-time music format also capture a younger audience. The listeners that respond to this prominent, consistent presentation probably best reflect the primary appeal of public radio's jazz programming.

Stations principally identified as news or classical outlets, but which devote a daypart to jazz, almost always the evening hours, attract an older jazz audience. We think this is because a portion of these stations' loyal core audience, which is shaped primarily by the older appeal of classical music and information, keeps listening, while their fringe listeners, who are younger, are chased away by the change in format.

political outlook as middle of the road.

Jazz listeners are heavy radio users. They use more stations than any other group and use their radios more often. But public radio gets only a portion of their attention. They are the least loyal listeners. They tune in to public radio the least number of times and the least number of days per week. When they do tune, however, they listen for a while. Their average weekly time spent listening is more than classical listeners, but less than information listeners. Jazz-dominant listeners are the least likely to be members.

Race is a significant factor. Compared to other formats, jazz listeners are more likely to be black. One of four jazz-dominant listeners is black; 40 percent of the blacks in the AUDIENCE 88 sample are jazz-dominant listeners.

Mixed-Format Listeners

Mixed-format listeners spend more than an hour per week with two or more of public radio's principal formats.

Although they are defined by *what* they listen to, they are most readily distinguished by *how* they use their public radio station. They tune in often, throughout the week, and spend a great deal of time with the public station. Seventy percent of them are heavy core listeners: public radio is their favorite station — they listen to it more than any other — and they listen a lot.

What formats do these listeners choose? The overwhelming majority, 95 percent, listen to more than an hour of information programming per week (see Graph 31a below).

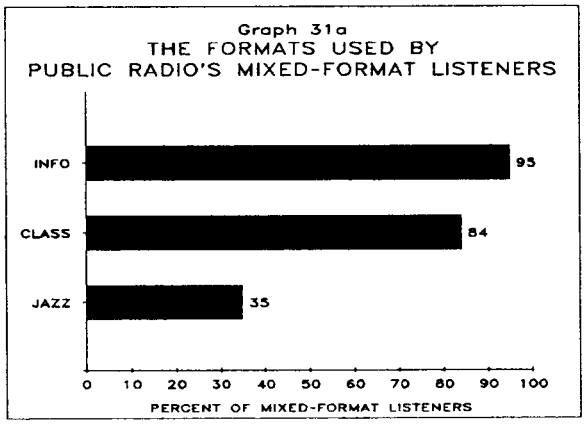
Classical music listening is almost as significant; 84 percent of the mixed-format listeners spend more than an hour per week with classical music.

Jazz listening shows up with what many would consider surprising strength — 35 percent listen to jazz more than an hour per week.

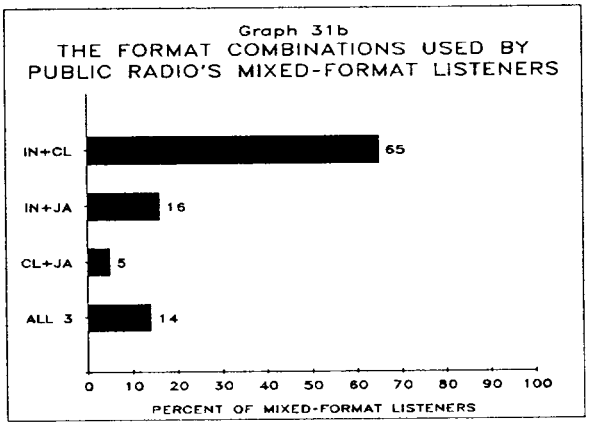
Information and classical music is the most prevalent format combination for these listeners, outstripping others by more than four to one. Interestingly, one in seven mixed-format listeners (3.3 percent of the total audience) listen to more than an hour per week of all three major formats (see Graph 31b).

The difference in *amount* of public radio listening between mixed-format listeners and others is remarkable. Mixed listeners tune to public radio two to three times as often as other listeners. Their listening time averages three to four times greater than other groups. They are two to three times as loyal, in terms of the percentage of the total radio listening time they give to public radio.

Part of the explanation for this usage pattern is definitional. To qualify as an information, classical, or jazz-dominant listener, a person need only listen to one of these formats more than any other. Some of these people may tune to their



Graph 31a
THE FORMATS USED BY
PUBLIC RADIO'S MIXED-FORMAT LISTENERS



Graph 31b
THE FORMAT COMBINATIONS USED BY
PUBLIC RADIO'S MIXED-FORMAT LISTENERS

public radio station only a few quarter-hours each week. The mixed group, in contrast, listens five quarter-hours or more a week to at least two formats, or a minimum of two and one-half hours total (10 quarter-hours).

What AUDIENCE 88 discovers with mixed-format listeners, however, is something much more than heavy listening.

These are public radio's most Inner-Directed, most Societally Conscious listeners. They are also public radio's best-educated listeners.

A majority of the mixed-format listeners work in professional and technical jobs. Their household income essentially matches that of information listeners, well above both the classical and jazz groups. A majority consider themselves liberal politically — slightly more liberal than information listeners, much more than jazz and classical listeners.

In age, like information listeners, they fall between the younger jazz audience and the older classical audience. They report listening to public radio for more years than any other group (one of the few areas in which they differ from information-dominant listeners).

These listeners believe their public radio station is very important to them and to their community. They are likely to support public radio financially. A *majority* say they are current members.

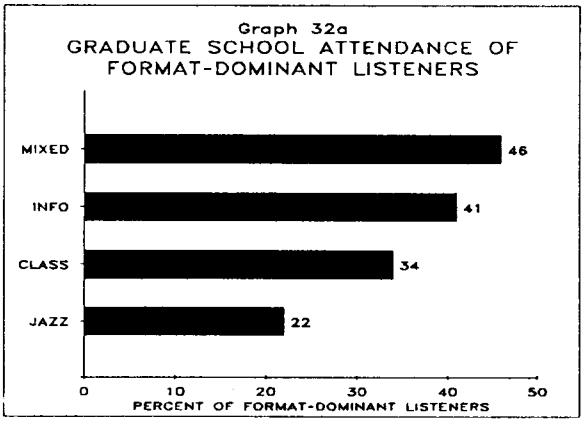
The Audience for Different Formats

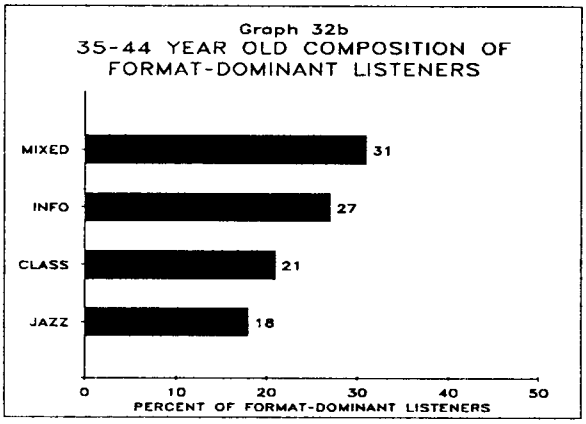
The audience for any given format will consist of all four listener types. Those listeners who are dominant for a format constitute a very large share of the format's audience. Those dominant to other formats are a very small portion.

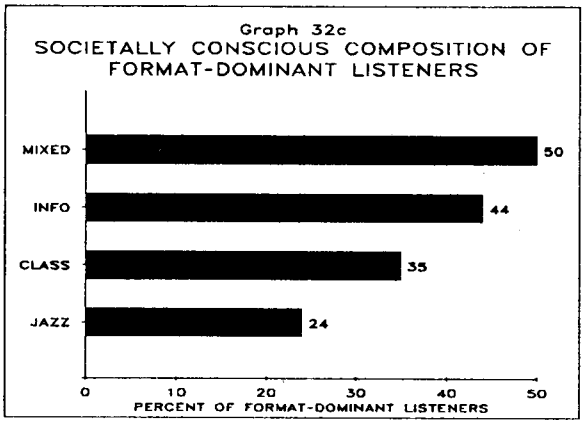
Mixed-format listeners, with their heavy use of public radio, have a decided impact on the composition of the total audience for each respective format. There are numerous times throughout the broadcast day when a station's audience will consist more of mixed-format listeners than of listeners who are dominant for whatever format is then on the air.

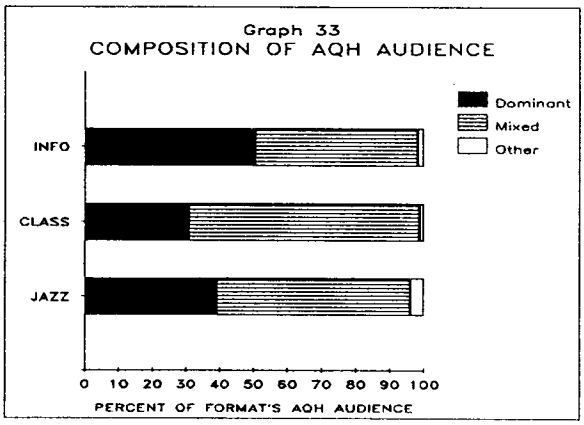
Education, age, and VALS type are the most important factors that separate public radio listeners from nonlisteners, and the listeners to one format from listeners to another.

Mixed-format listeners are at the core of public radio's overall appeal.









What happens when mixed-format listeners are combined with the three format-dominant listener groups described in this section?

Because mixed-format and information-dominant listeners are similar in so many respects, the audience for information programming is the most homogeneous of the audiences for the three major formats. The variations to be found among those listening to information programming are more a matter of distinctions between core and fringe listeners.

A notable statistic emerges when mixed-format listeners who listen to information programming are combined with information-dominant listeners. This group accounts for 87 percent of all who listen to information programming (cumulative audience), and 98 percent of all listening (AQH) to this format. Yet a majority, 59 percent of this group, spend less than an hour each week with either classical music or jazz — they seem to find most of their music somewhere other than on public radio.

When we examine the audience for classical music, there are important differences between the classical-dominant group and the mixed-format listeners who listen to classical music. The classical-dominant listeners are older than the mixed-format listeners, more Outer-Directed, consider themselves more conservative, and are slightly less educated and less affluent. Mixed-format listeners who include classical music as one of their formats are younger, more Inner-Directed, somewhat better educated, and better off financially. These two groups account for 99 percent of all classical listening.

There is a similar division between jazz-dominant listeners and mixed-format listeners who listen to jazz. Those who stick to jazz are more Outer-Directed, more conservative, less educated, less affluent, and younger. Mixed-format listeners who listen to jazz are more Inner-Directed, more liberal, better educated, and more affluent.

The Importance of Mixed-Format Listeners

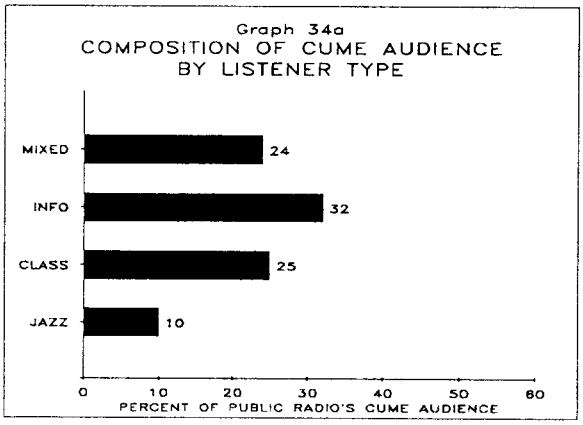
In summary, mixed-format listeners are significantly different from all three format-dominant groups in station listening time, station loyalty, the number of days the station is used, the number of times the station is tuned, advanced education, professional or technical occupations, station membership, and the degree to which they believe the station to be personally important to them. This is the group of radio listeners for whom public radio provides an especially significant service — a mix of information and music programming that most prefer to that presented on any other radio station. This analysis underscores the importance of the listener who enjoys more than one of public radio's formats. Public radio's strongest audience appeal appears to transcend genre. It may in fact be dependent on such transcendence.

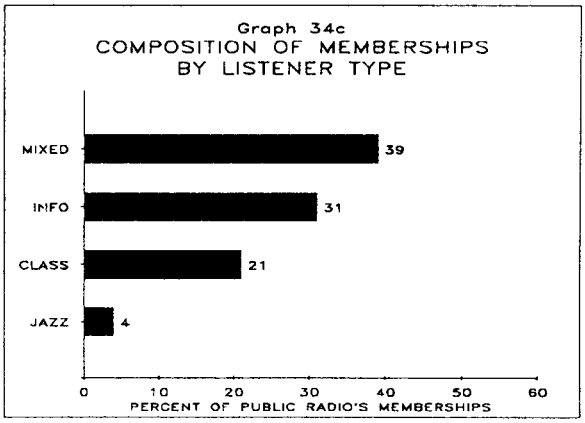
This discovery is exciting because it encourages public radio to consider the many possibilities of successful programming combinations. It may be one of the first times that audience research has encouraged public radio to consider the importance of programming diversity. The notion of appeal affinity among different programming elements is a spur to creative thinking about programming.

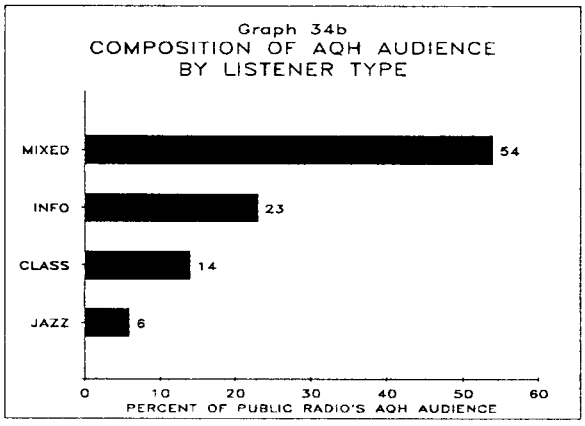
AUDIENCE AND MEMBERSHIP BY LISTENER TYPE

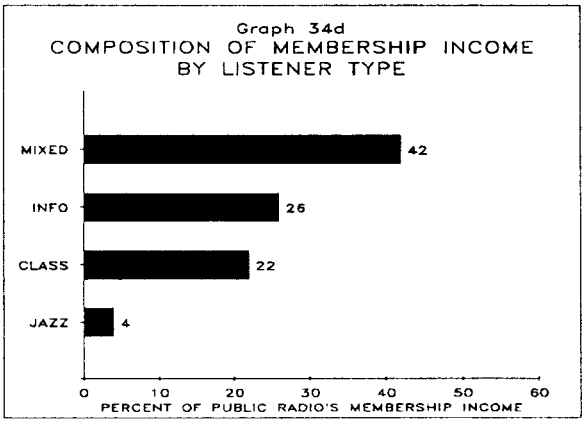
The graphs below (34a and 34b) illustrate the contribution of different listener types to public radio's cumulative audience and AQH audience. Mixed-format listeners are 24 percent of all listeners, but they account for 54 percent of all listening.

These graphs (34c and 34d) show the comparative role of each listener type with respect to membership and membership income.









DIFFERENT VIEWS OF APPEAL

The charts on these two pages illustrate different ways of analyzing public radio's appeal.

Each horizontal row represents one of public radio's three dominant formats — information, classical music, and jazz.

Vertical columns present characteristics selected from one of the three variables AUDIENCE 88 finds especially powerful in understanding public radio listening — education, age, and values and lifestyle.

Within each chart, each bar represents a measurement of a format's audience using one of four techniques described below.

- Striped bars are based on all the listeners for the particular format.

  The top bar is the cumulative audience (cume) for the format. Each listener is counted once, regardless of how much time is spent listening.

  The second bar is the average quarter hour (AQH) audience for the format, a snapshot of the audience listening at any one time.

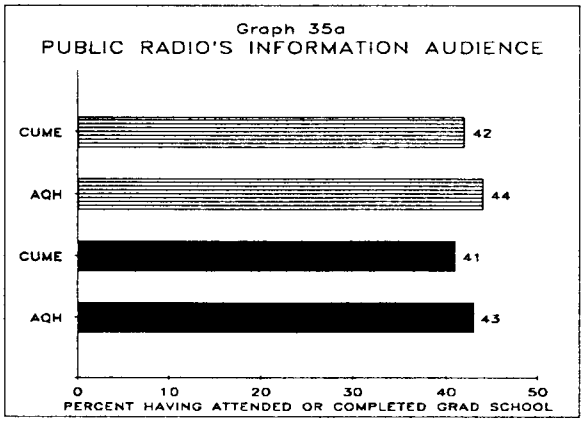
- Solid bars represent format-dominant listeners only — those who listen to the indicated format more than an hour a week and do not listen to any other format for more than an hour.

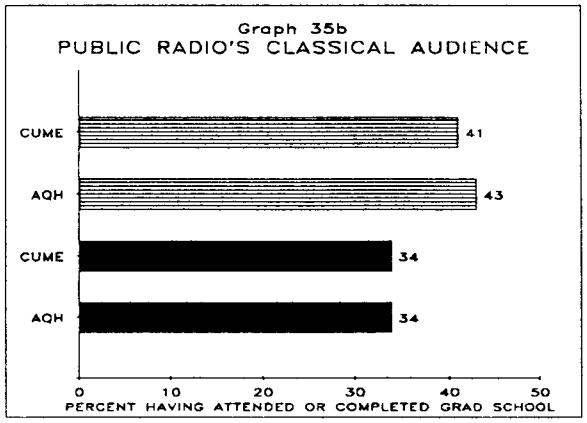
  The third bar is the cumulative audience of format-dominant listeners.

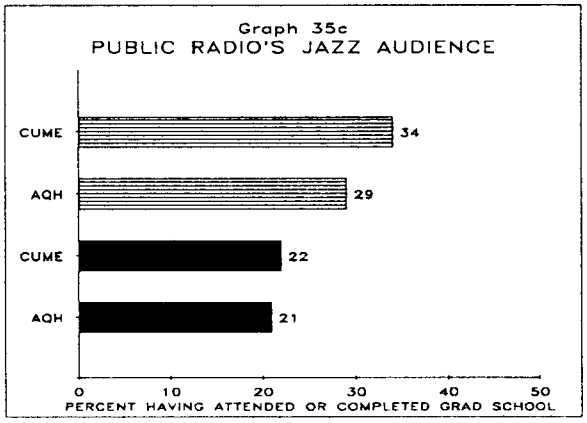
  The bottom bar is the AQH audience of format-dominant listeners.

Each method gives us different information about a format's audience. Moving from top to bottom in each chart, we get closer to the heart of a format's appeal — or lack of appeal — to people with the indicated characteristic.

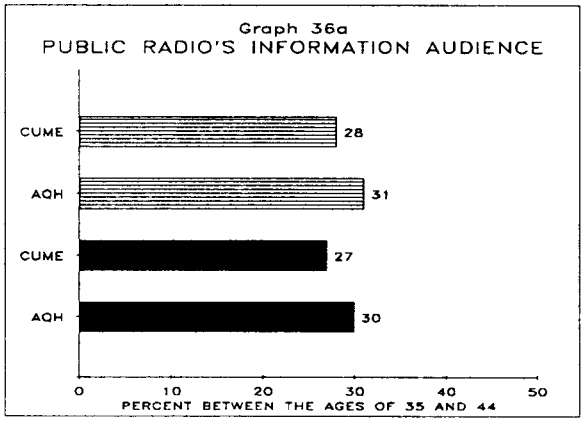
GRADUATE SCHOOL ATTENDANCE

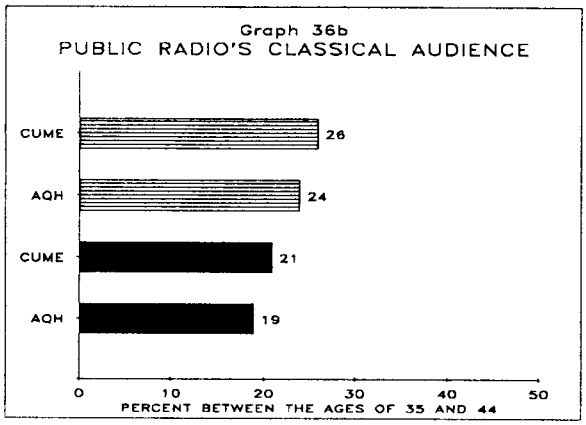


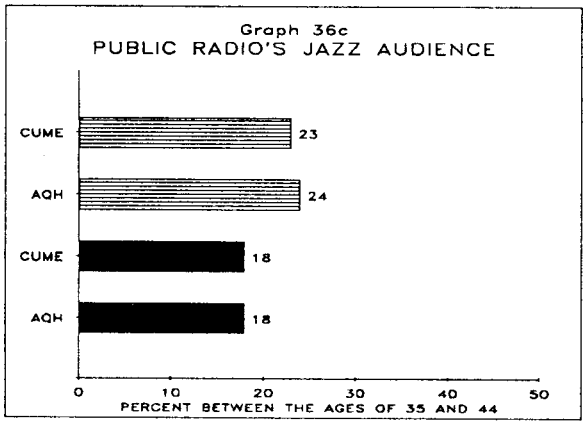




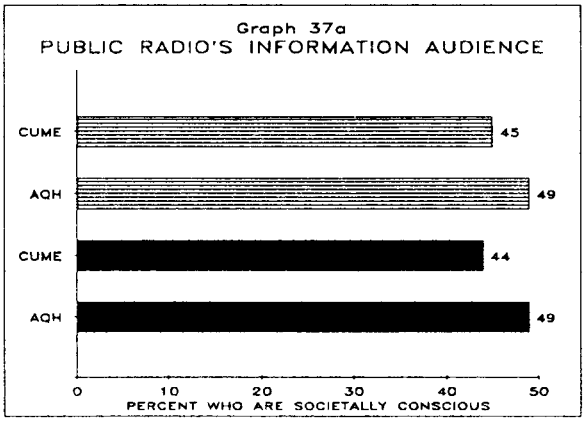
35-TO-44-YEAR-OLDS

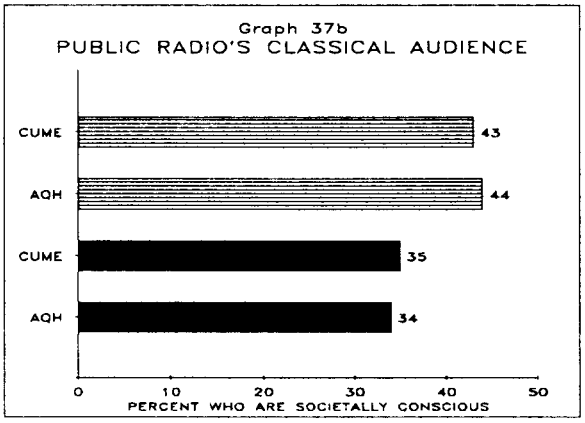


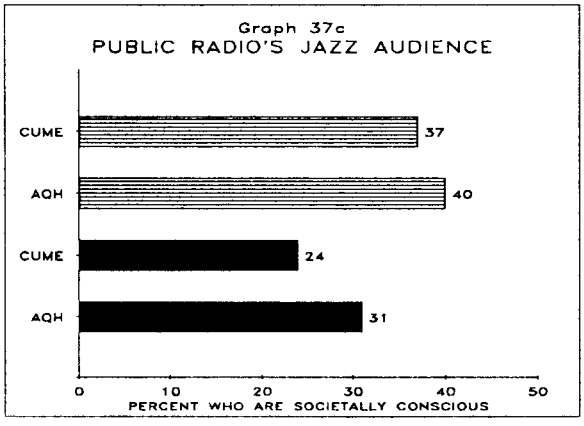




SOCIETALLY CONSCIOUS VALS TYPE







THREE LISTENER TYPES

AUDIENCE 88's data provides an exceptional portrait of public radio's appeal, but it still stops short of the underlying patterns that would explain the ebbs and flows of listening. Here is one speculative model that makes some sense.

We have hypothesized three kinds of public radio listener, which, drawn broadly, are as follows:

Type A Inner-Directed, Societally Conscious
Age 35-55
Attended graduate school
Politically liberal
Works as a professional
Household income of $50,000

Type B Outer-Directed, Achiever or Belonger
Age 55+
Graduated from college
Politically conservative
Works as an administrator
Household income of $40,000

Type C Outer-Directed, Achiever or Belonger
Age 25-35
Attended college for 3 years
Politically middle-of-the road
Works in clerical position
Household income of $30,000

Type A listeners integrate public radio into the eclectic aesthetic of their lives — at home, at work, and in between. Public radio provides a sense of engagement and connectedness to cultural and political life. It is a stimulating and enjoyable continuing education for this intellectual elite. They are a large segment of public radio's information audience, and form a significant portion of both the classical and jazz audiences. They may have come to public radio for *All Things Considered*, but they spent a lot of Saturday nights with *A Prairie Home Companion*. They are probably a third of public radio's cumulative audience, and easily account for two thirds of public radio listening. In fact, the majority of those listening at any one time are typically Type A. With their affluence, they can afford to pay for this service they value. They probably contribute over three-fourths of public radio's financial support.

Type B listeners make public radio's music a comfortable part of their environment, with much of their listening done at home. Their musical tastes are mature and outside the mainstream of popular culture. They find public radio a welcome oasis of quality on the airwaves. More Type B listeners tune in to classical music over the course of a week than any other type. Because Type B listeners do not tune in as often as their Type A counterparts, however, there are likely to be more Type A listeners in the classical audience at any one time. Type B listeners constitute a significant block of public radio's jazz listeners, although they are sometimes outnumbered by Type C listeners in the jazz audience, especially late at night. These listeners are not especially fond of public radio's information programming — perhaps they find it too intrusive, too earnest, or too liberal — and many actively avoid it. Type Bs who like classical music generally do not listen to jazz, and vice versa. They probably contribute 20 percent of public radio's member support.

Type C listeners find public radio a sophisticated alternative in their multistation listening repertoire. These younger listeners are still shaping their tastes and lifestyle, experimenting with culture and ideas. They come to public radio mostly for the music, especially for jazz, but occasionally give the news a listen too. They form a substantial portion of the total jazz audience, especially for more contemporary works. They are a smaller portion of the information and classical audiences. Type C listeners are not particularly loyal to public radio, which gets a relatively small percentage of their radio time, but they aren't especially loyal to other stations either. They use more stations per week than any other listener type. Their use of public radio's services is too light for them to consider it very important. That fact, together with their lower incomes, translates to a very low level of financial support.

4.
AUDIENCE BUILDING

A careful evaluation of public radio's audience-doubling goal indicates that the target is difficult but appears to be feasible. The prospects for audience doubling for individual stations, however, will vary substantially, depending on their specific programming and the presence in their markets of the kinds of people to whom public radio most appeals. Successful strategies will require hard choices about what to program for whom.

In 1984, National Public Radio adopted a goal of doubling the average quarter hour (AQH) audience for NPR member stations over a five-year period. Other public radio organizations endorsed the goal.

Almost five years later the public radio system as a whole remains broadly committed to increasing audience service. Yet aside from a few bright spots for individual stations and some national programs, the audience-doubling goal has proved more elusive than many had hoped. NPR reported in October 1988 that the AQH audience for NPR members had grown by 26 percent and the cumulative audience by 30 percent. With the progress already accomplished, achieving the audience-doubling goal will require a 60 percent increase in the current AQH audience.

Moreover, much of the audience growth that public radio has realized over the past four years occurred from 1984 to 1986. In the 1986 to 1988 period, AQH audience for NPR members, who generate over 90 percent of the audience for all public radio, increased by less than 2 percent.

Some have suggested that the audience-doubling target may be unrealistic, and that public radio, especially in some communities, may have already realized close to its maximum potential. A number of managers and programmers have argued that audience doubling, however worthwhile at a general level, has not been sufficiently infused with a sense of strategic direction for action, and that the goal was adopted more on hope and faith than any detailed analysis of current and prospective service.

In this section, we first apply AUDIENCE 88's findings to the feasibility of audience-doubling. We then review strategies for reaching the goal.

AUDIENCE DOUBLING: REALISTIC GOAL?

The major federal investment in station facilities and operations throughout the 1970's and early 1980's fostered some 300 professionally staffed stations providing a signal to almost 90 percent of the American population. The accompanying multi-million dollar investment in National Public Radio enabled stations to complement their local efforts with high-quality national programs, producing a unique mix of information and music programming.

In the early 1980's, public radio sought to improve the efficiency of these facilities and programming investments through increasing listeners' use of its services. The focus of these efforts was the form of presentation — more effective scheduling, fewer abrupt program changes, more on-air promotion, improved announcing techniques, and better design of national programs. The goal was to make public radio's quality programming more accessible to listeners.

By 1984, however, public radio's attention was centered elsewhere. The public radio system was reeling from NPR's financial crisis and cutbacks in federal funding. Stations were divided on many issues, national organizations were at odds, and

national attention was principally focused on financial and structural concerns.

In this adverse climate, a campaign to double the audience was an attractive, unifying rallying point for the system, with the special benefit of refocusing attention on programming and service.

In the years since the audience-doubling goal was adopted, public radio's fortunes have improved markedly. Federal support is at an all-time high. A restructured National Public Radio is stronger than ever. American Public Radio, new producers, and new programs have established themselves in the national program marketplace. But the system seems to be floundering in its pursuit of listeners.

At the broadest level, it might be asked whether public radio can double its audience service by any means, including substantial changes in its programming. AUDIENCE 88, which studies only public radio's current programming, cannot answer that question. In any event, audience doubling proponents have not encouraged the pursuit of listeners "by any means necessary," but rather an effort to increase use of the kinds of formats and programming public stations already provide.

In a more focused context, then, the question is whether public radio has legitimate prospects for significantly increasing the use of programming with essentially the same appeal as that now presented. To state the issue more precisely, is it feasible to:

- Increase the number of public radio *listeners*?
- Increase the average amount of *listening* to public radio by current and new listeners?
- Do both to the extent that the combined impact is to double public radio's 1984 listening?

It is important to recognize the role of growth in *both* listeners and listening. It might be possible to double public radio's AQH audience by simply doubling the number of people who listen if one assumes that the new listeners would listen as much as current listeners. It also might be possible to get all current listeners to listen twice as much. The more powerful and realistic strategy, however, incorporates both dimensions of audience growth.

Finding Listeners

AUDIENCE 88 demonstrates that particular kinds of programming appeal to particular kinds of people. If the audience is to double with much the same programming as is now in place, the appeal will remain much the same and so will the kinds of people who listen.

Most new listeners to public radio will therefore come from increasing public radio's reach, or penetration, into audience segments that already respond strongly to the service. In evaluating the feasibility of audience doubling, it is important to concentrate on these prime segments — not only for the opportunities they provide, but also for the limits they impose.

Audience growth is most likely to be *constrained* in the audience segments where public radio's reach is already substantial. In simple terms, a station cannot realize more than 100 percent reach into a segment. The likely reach, even in prime segments, will be a lot less.

Public radio's capacity to increase its present audience by 60 percent — the amount needed to reach the audience-doubling goal — is limited by the overall size of the constituencies for whom it has the greatest appeal, the extent to which members of those segments now listen, and the maximum possible reach within such segments.

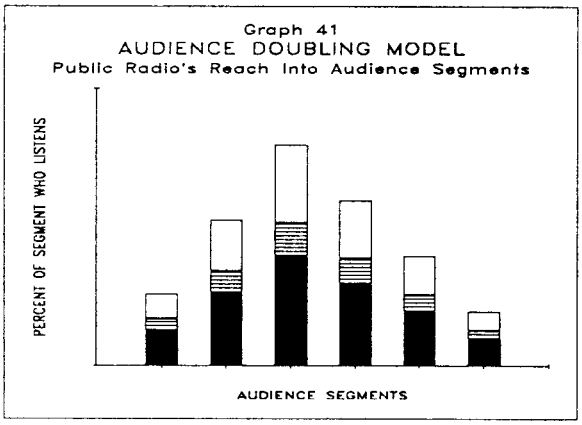
Given the appeal of current public radio programming, the most likely new listener for most stations is a highly educated, Societally Conscious person in the 35-to-44 age bracket. The further one drifts from this overlapping configuration, the less likely one is to find a new listener. The question, then, is whether public radio can reach enough *new* listeners who match this primary listener profile.

Listeners in other segments are also important for any audience-doubling strategy. As the overall audience grows, audience service will rise across all segments. As long as programming appeal remains essentially constant, however, the pattern of reach into different segments will not change.

As "Raising the Curve" makes clear, public radio has real opportunities for greater reach and real constraints, both shaped by programming appeal.

RAISING THE CURVE

The chart below illustrates how audience growth plays out across audience segments. The black portion of each bar represents public radio's 1984 audience, the shaded area is the growth from 1984 to 1988, and the white area is the additional growth required to meet the audience doubling goal.



Segments of peak appeal provide the largest number of new listeners and the greatest constraint on growth. Growth in these prime segments must be accompanied by growth in all other segments as well.

How does this model play out with respect to those factors that are most useful for understanding the public radio audience?

AUDIENCE 88 affirms earlier findings that education is the most powerful predictor — the more education people have, the more likely they are to listen to public radio.

The peak of public radio's education appeal is to people who have pursued their education beyond a college degree. AUDIENCE 88 reports that 38 percent of public radio's audience have attended graduate school — a third of all Americans who have attained this level of education. A 60 percent increase in the reach into this highly educated segment — the increase over current listening required to meet the audience-doubling goal — would require public radio to serve, each week, 53 percent of all Americans who have gone to graduate school. Is this possible, too modest, or too ambitious?

Age is one of the most widely used factors in commercial radio targeting — what are the possibilities for public radio? Public radio currently has more listeners in the 35-to-44-year-old bracket than any other — one in four public radio listeners. This reflects both the size of this age group, swelled by the baby boom, and public radio's strong appeal to these listeners.

Public radio currently reaches 8 percent of all Americans in the 35-to-44 age bracket each week. To reach the audience-doubling goal, public radio would need to reach about 13 percent of the people in this age bracket. Is this possible? It is important to be realistic; this group is aggressively pursued by many commercial broadcasters.

What about Societally Conscious listeners, the VALS type that constitutes 42 percent of the public radio audience? About 20 percent of Societally Conscious people now listen to public radio, and for every one Societally Conscious person who listens to public radio, there are four who do not. To reach the audience-doubling goal, public radio would need to reach one of every three Societally Conscious Americans.

Summarizing the calculations above, realization of the audience-doubling goal, on the basis on new listeners alone, would require a reach of 13 percent of 35-to-44-year-olds, 53 percent of people who have pursued their education beyond college, and 32 percent of all Societally Conscious people.

How realistic are these targets — and for which segment does the necessary reach pose the greatest problem?

Encouraging More Listening

The foregoing discussion is framed in terms of reaching the audience-doubling goal entirely through increasing the number of listeners. As we stated at the outset, however, it is equally important to explore increasing the average amount of listening done by existing and future listeners.

As noted above, average public radio listeners spend a little less than 8 hours per week with their public radio station. This is less than the time listeners spend with the average commercial radio station. According to *American Radio*, by James Duncan, Jr., commercial stations that present the major adult radio formats generate average weekly listening times in the range of 9 to 12 hours per week.

The difference in listening time is not because public radio listeners spend less time with their radios. In fact, public radio listeners spend over 11 percent *more* time listening to radio than the average radio listener — they just spend less time with *public* radio.

The higher average listening times achieved by various commercial formats establish important points of reference for public stations. The highest listening levels for commercial stations, such as the 11.4 hours per week Duncan's *American Radio* reports for black/urban formats in 1988, or the 11.2 hours per week for beautiful music/easy listening formats, might be seen as a theoretical maximum for public radio. These listening levels would represent an increase for public radio of over 45 percent and are probably unattainable given the nature of current programming on most stations.

Public radio might more realistically look toward the time-spent-listening figures generated at the lower end of the major commercial formats. For example, the average listener for stations broadcasting adult contemporary, contemporary hit radio, and album-oriented rock formats spends between 8.6 and 9.5 hours with the station per week. If public radio could achieve these levels, it would translate to a 15 to 20 percent increase in listening.

Where will increased listening time for public radio stations come from? It will come from listening that people are currently giving to other radio stations. Only the most extraordinary programming, such as *A Prairie Home Companion* at its peak, will change a person's general listening habits and increase the overall amount of time a person spends listening to radio. For the most part, building time spent listening is a matter of increasing the percentage of all radio listening that people give to their public radio station — that is, their loyalty to public radio.

The focus for increasing listening, as for increasing listeners, should ultimately be on those audience segments for which public radio has its strongest demonstrated appeal. At a very sophisticated level of analysis, going well beyond AUDIENCE 88, it would be possible to establish listening benchmarks and targets for specific audience segments.

Combining Listeners and Listening

By considering potential progress in time spent listening, we might reduce somewhat the reach into primary audience segments needed to achieve audience doubling. For example, if public radio could increase average listening time by 15 percent, the additional listeners needed to meet the goal would be about 40 percent above current levels. This compares to the 60 percent increase in listeners required to double AQH audience solely on the basis of new listeners.

THE DELAYED PAYOFF

Even if public radio can reach a significant number of new listeners, such growth will not immediately bring a proportionate increase in listening. Average public radio listeners spend a little less than eight hours per week with their public radio station. During their first two years of listening, though, average listeners tune in only six hours per week.

As a consequence, any growth in cumulative audience must be initially discounted by as much as 25 percent in terms of the contribution to AQH audience. A station experiencing a 50 percent growth in the cumulative audience might see a 38 percent increase in listening, or AQH audience.

A 15 percent increase in average listening time is the equivalent of about 70 minutes of additional listening per week. To put that figure in perspective, a 70-minute increase would mean about 1 more listening occasion per listener per week.

Recalculating the figures needed to attain this increase, public radio would need to reach 11 percent of 35-to-44-year-olds, 46 percent of people who pursued their education beyond college, and 28 percent of all Societally Conscious people.

This is not the only model, of course. There are numerous possible combinations of growth in listeners and listening that will yield similar results.

These targets, both for increasing time spent listening and for reach into specific audience segments, are ambitious but not impossible. AUDIENCE 88 data suggest that the audience doubling goal is realistic but that achieving it with programming that matches current appeal will be difficult.

AUDIENCE-BUILDING STRATEGIES

Our examination of potential audience growth for public radio should lead to more specific discussions of who will constitute public radio's future listening audience. Our discussion of the differences among stations and markets may focus attention on the need for more precise translation of national goals to local targets. The fact remains, however, that significant audience growth will require the design and energetic implementation of carefully developed, action-oriented strategies, both for individual stations and the system as a whole.

AUDIENCE 88 does not chart a clear path to a larger audience for public radio. The study is a snapshot, an assessment of the public radio audience at a single point in time. The study does not track how programming and audience have evolved and grown over the years. However, the wealth and depth of the data allow us to theorize with some certainty about the effect certain programming strategies will have on audience growth.

AUDIENCE 88's fundamental notion is appeal — the critical linkage between programming and audience. Different kinds of programming appeal to different kinds of people; the appeal of a station's programming causes and defines its audience; and through decisions about content, form, and style, all of which shape programming's appeal, a station will shape its audience.

To apply this notion to the audience-building challenge, public radio must devise ways to strengthen its appeal, to become more appealing to more people. At bottom, these various programming approaches reduce to a critical strategic choice.

- Should a station *diversify* its appeal and provide programming for two or more relatively distinct constituencies?

- Should a station *unify* its appeal, increasing its reach into and use by a particular audience segment?

Diverse Appeal

The theory of diverse appeal is that distinct programming streams will serve distinct audience segments, allowing a single station to serve diverse elements of its community. Listeners will seek out the programming intended for them, and perhaps appreciate some exposure to other programming as well. While listeners will encounter periods of time when the station is programming for someone else, they will accept this as the trade-off for the special and unique service public radio offers them.

The principal rationale for this approach is that public radio has a public service responsibility to provide certain kinds of programming that are unavailable on other stations. Typically it is determined that some kinds of programming, such as jazz, classical music, or drama, have an inherently superior value relative to other kinds of programming. A public radio station, it is argued, should assure that such programming is available. The result, many believe, will be two or more loyal audiences for whom the station is important as the only source for certain programming.

This approach characterizes the programming of many public radio stations today. Indeed, even those stations that confine their programming to public radio's traditional, mainstream formats are

THE LOCAL CONTEXT

A station's capacity for audience growth reflects a variety of local circumstances, including the number of people within its signal area, the composition of the community with respect to those groups for which its programming has a strong appeal, the size of its current audience, and the effectiveness of its own efforts.

The size of a station's audience is more a function of the number of people within the station's signal area than any other factor. The largest 10 markets account for 33 percent of the population and 31 percent of public radio's national audience. The top 25 markets account for 51 percent of the population and 53 percent of public radio listeners. Success in attaining national goals obviously turns on the performance of a short list of stations in major markets.

Market size is only a part of the picture, though. National Public Radio's *State of the Audience* report (January 1988) compared the largest 25 radio markets in population size to the top 25 markets for NPR listeners. Several markets have significantly more public radio listeners than one would predict on market size alone. Minneapolis-St. Paul, for example, is the 14th largest market, but ranks 5th in NPR listeners. Denver is the 19th market in size, but 8th in number of NPR listeners.

AUDIENCE 88 explains some of these market-by-market differences. The kinds of people most attracted to public radio programming are not uniformly distributed throughout the country, but are found in high proportions in some communities and smaller proportions elsewhere.

Communities with high concentrations of the demographic and psychographic segments for which public radio programming has its strongest appeal are fertile areas for audience growth. Those communities where such segments are proportionally smaller will prove more difficult.

Education is our recurring focal point of public radio appeal. Two-thirds of the public radio audience completed college, compared to only one in five of all Americans over the age of 18. A community in which 25 or 30 percent of the population over 18 years of age completed college has much more potential for public radio than a community with only 15 percent college graduates.

The Societally Conscious VALS type is also not uniformly distributed geographically. Societally Conscious persons are overrepresented in the Northeast and on the West Coast, and are underrepresented in the South and Midwest.

AUDIENCE 88 also highlights the different appeal of different formats. A logical extension is that the importance of various population segments will vary from station to station, depending on each station's program mix. Stations that present relatively little information programming may need to focus more on the number of VALS Achiever or Belonger types in the community, rather than Societally Conscious listeners. Similarly, jazz stations might pay more attention to younger age brackets than other public stations.

Finally, there is the question of how much progress a station has already made toward realizing its full audience service potential. It is only common sense that stations that have already achieved considerable audience success will have a harder time doubling their audience than those stations that are just starting their audience-building efforts.

But even here there are exceptions. The Radio Research Consortium publishes an Honor Roll of stations "on schedule" in meeting the audience-doubling goal. Of 41 stations on the Honor Roll in 1988, 6 had been ranked at the top end of their market size group in AQH audience at the *beginning* of the audience-doubling period. These stations started out strong, and have become even stronger.

presenting programming of more diverse appeal than they may have imagined. As Section 3 illustrated, there are important distinctions in the appeal of each public radio programming element.

AUDIENCE 88 data suggest that the diverse-appeal approach undercuts listener satisfaction and may reduce both the number of listeners and the level of listener support.

AUDIENCE 88 finds that public radio listeners consider a station personally important in direct relationship to the extent they use it. They also consider a station important to their community in direct relationship to the extent they use it. And their willingness to support a station financially is directly tied to their use of it. *For public radio listeners, the importance of a station's service is tied to use, above and beyond any other factor.*

To the extent that a strategy of diverse appeal places obstacles to personal use of a station — and it clearly does — such a strategy works against the objectives of importance and financial strength.

The approach of serving two or more constituencies works well for many businesses and public service enterprises, from grocery stores to universities to museums. A grocery store may have its discount aisle and its gourmet section. A university can appeal to different students by scheduling a variety of classes at the same time. A museum can attract a variety of patrons with different exhibits in different galleries. All of these entities have the capacity to produce different appeals *simultaneously*.

A radio station, in contrast, can only be one thing at any one time. If the programming fails to appeal to a listener, there is no other aisle, class, or gallery available — there are only other stations.

American radio broadcasters have responded to this phenomenon with programming strategies principally based on consistent, reliable appeal. Each station seeks to fill a distinct service niche in the radio marketplace. Radio listeners can expect, and have come to rely upon, such consistency of service.

Most commercial stations maintain this consistency of appeal even when they "break format," as in morning drive-time shows with a different sound than the remainder of their day. Such scheduling is done on a calculated basis in a manner designed to maximize audience. The sound is adjusted by daypart to reflect the pace of their listeners' lives. The target listeners, and the underlying appeal, rarely change.

Historically, public radio has made dramatic shifts in appeal throughout the week, over the course of a day, and often within individual dayparts. While stations have moved closer to the presentation of programming with consistent appeal, the typical public radio station continues to broadcast to two or more distinct audiences. The timing of these appeal shifts are often determined by convenience, program feed schedules, the availability of staff and volunteers, and what "feels right." They are often made without the benefit of (and sometimes with disregard for) audience research.

As a result, public radio frequently positions itself as an anomaly in the marketplace. Getting listeners to tune in at specific times for specific programming is very difficult. Most radio listeners tune in when it is convenient to do so. Exceptional programs occasionally generate a substantial tune-in audience, but they are few and far between.

How does this square with AUDIENCE 88's finding that mixed-format listeners are among those who most enjoy and value public radio?

The existence of the mixed-format listener does not speak to the success of the diverse-appeal approach as outlined here. Mixed-format listeners are not the diversity of constituencies at which diverse programming is theoretically aimed. They are actually a relatively homogenous group of listeners who find more than one of public radio's formats appealing.

Our format analysis explored the three dominant formats on public radio — information, classical music, and jazz — not the full range of public radio programming. Only 14 percent of the mixed-format group uses all three of these principal formats; most use just two. Over 80 percent of the group is essentially a "news and something else" audience.

The theory of diverse programming serving diverse constituencies, all on the same station, rarely works. Public radio stations will serve more people, and serve them better, with a different approach.

Unified Appeal

The theory of unified appeal is that consistent reliable service to a particular audience segment will result in a more satisfying and important service for the listeners who use it and that a greater number of people are likely to listen. People will tune in and out as their lifestyle permits. Once they have tuned in, programming will not change appeal and cause them to tune away. The station will be constantly accessible to its consistent audience.

The principal rationale for this approach is to achieve a maximum level of satisfaction, significance, and personal importance among those who listen to public radio. Proponents of this strategy suggest that it will attract more listeners who will listen more often for longer periods of time and that these listeners will be more likely to support public radio financially.

AUDIENCE 88 *findings suggest that programming with unified appeal will enhance most public radio stations' prospects for audience growth, while still accommodating a surprising diversity of content.*

The strategy of unified programming appeal requires an explicit organizational decision to focus on a particular group of listeners and to make all programming decisions based on the needs and interests of that audience segment. A major difficulty in implementing this approach is that many stations will find it difficult to maintain a consistent appeal while fulfilling the often diverse demands of their organizational mission.

The explicit articulation of which audience the station will serve, with the implicit corollary of which audiences it will not, is certain to provoke ongoing questions about the appropriateness of the choice. This questioning will come from many quarters: parent institutions that hold the license of many stations, the political arena, community groups, station staff, board members, and volunteers — all of whom share a very natural tendency to expect the stations to do just a few more things for just a few more people.

The difficulty comes in structuring such discussions in a rational and productive manner and communicating the intricacies of how radio works to community members, friends, and supporters who are unfamiliar with such terrain. The unified-appeal strategy is likely to place more demands on professional station leadership than other strategies.

Even when the programming direction is clear, achieving a unified programming appeal is more difficult than it appears at first blush. The radio marketplace is dominated by stations that unify their appeal primarily through the nearly exclusive use of a single programming genre — one kind of music, all the time, or the all news/talk station. This single-genre approach is also the most prevalent approach to unified appeal within public radio.

Despite the apparent continuity, airing the exact same programming throughout the broadcast day does not guarantee a consistent appeal for a particular audience segment. In fact, it may have just the opposite effect for the kind of listeners for whom public radio now has its greatest appeal.

For instance, public radio's information programs may work well when listeners can give them close attention, but not when these same listeners must concentrate on personal and professional demands and responsibilities.

Further, it is not at all obvious how various programming elements may unite into a single strand of appeal. *A Prairie Home Companion* presented an eclectic mix of music, poetry, readings, and drama to public radio's listeners — tied together by a unifying aesthetic sensibility and the powerful appeal of the program's remarkable host. And interestingly enough, the audience segment to which *A Prairie Home Companion* appealed most strongly consisted of precisely the kinds of people most strongly attracted to public radio's news and information programming. We can see and measure that in retrospect, but how does one anticipate it?

The pursuit of a unified programming appeal composed of diverse programming elements is full of temptation for personal indulgence — the "I like it, they'll like it" school of broadcasting. It takes individuals of genuine talent and discipline to design and implement such programming.

Programming with unified appeal holds the prospect of increasing public radio's audience service, as measured by use, importance, and financial support.

5.
TARGETING

Public radio must be clear about whom it intends to serve. Programming goals have traditionally been set in terms of content, but they increasingly incorporate audience-oriented factors. Stations can use AUDIENCE 88's *findings about programming appeal both to understand the targets of content-based program decisions and to design appeal-based program strategies.*

If audience appeal is this study's most powerful concept, audience targeting is its most provocative issue. Once the question of who is served by public radio is opened, so too is the question of who should be served.

Public radio stations are created for complex reasons and to achieve diverse objectives. The potpourri of purposes, goals, responsibilities, and rationales for continued existence and public support that guide a station's management is generally termed the station's mission.

For much of their history, public radio stations defined their mission in terms that were highly idealistic, broadly inclusive, frequently paternalistic, and often naive with respect to the opportunities and limits of radio broadcasting. Most stations' missions were, at bottom, only vague directives for actual operations, seldom translated into measurable standards suitable for performance evaluation. As audience researcher Tom Church put it, many stations could fulfill their mission without so much as a single person ever listening.

This situation began to change in the early 1980's, influenced by audience research, stations' growing reliance on listeners' financial support, and practical experience.

It was increasingly clear that some forms of presentation encouraged listening while others did not; that some approaches to scheduling promoted listener loyalty while others turned away even ardent supporters; that some programs stimulated generous contributions while others were left begging.

As managers and programmers gained a more sophisticated understanding of how the radio medium works and more accurate information about the audience effects of their various efforts, many stations reconsidered their mission, goals, and objectives.

Stations eliminated some elements of their mission out of recognition that they were in conflict with other, more important purposes or not well suited to pursuit through the radio medium. They defined goals more carefully, often in narrower terms. They articulated programming objectives with greater precision, in more quantitative, measurable terms. This refinement of mission, goals, and objectives enhanced their relevance and importance for day-to-day operations. Although the rhetoric was often less ambitious, the impact was generally more profound.

Some watched these developments with alarm, concerned that efforts to fine-tune mission, schedule, and presentation were leading stations away from basic social and cultural commitments that underpin public radio's service. The fear, in many cases justified, was that too much emphasis on form and focus was eliminating drama, documentaries, specialized audience programming, full-length concerts, and other traditional hallmarks of public radio.

As these changes played out, public radio experienced a period of sustained and substantial growth in the size of its audience and the level of its nonfederal financial support. Many factors were at work, including the development of new stations, improved signals, and the introduction of new

national programming such as *Morning Edition* and *A Prairie Home Companion*. But most observers attribute a significant role to the system's greater awareness of its audience and greater discipline about mission.

The "mission versus audience" conflict is increasingly seen as a false dichotomy. Instead, audience goals and a sensitivity to the audience consequences of programming decisions are more and more viewed as *components* of a station's mission, goals, and objectives — components that compete for attention and priority with other, more traditional concerns.

Virtually all public radio stations pursue missions that clearly set them apart from other radio broadcasters. A public radio station *sounds* different, and the reason, more often than not, has to do with the station's mission. Today, because of greater attention to the needs and interests of the audience, thousands more Americans can hear that difference every week.

We have reviewed the evolution in thinking about mission and audience because we believe AUDIENCE 88 introduces a new round of strategic issues for public radio that extend and refine this recent debate.

AUDIENCE 88 centers the discussion on the questions of *what service* we choose to deliver and *to whom* we intend to deliver it. As Chapters 2 and 3 make clear, the two questions are inextricably linked.

If the controversy of the mission-versus-audience dialogue can be simplified as sometimes difficult choices between *content* and *numbers* of listeners, the extension of that dialogue, informed by AUDIENCE 88, is of further choices between *content* and *kinds* of listeners.

This examination of choices will begin with a discussion of how the current public radio audience has come to be. We will then review approaches to audience targeting available to stations and the public radio system, ranging from continuation of decisions principally based on content to strategies more closely keyed to audience appeal. We will discuss how AUDIENCE 88 can advance the pursuit of both these options.

Programming Defines the Audience

Public radio has been guided from the outset by a mission crafted almost exclusively in terms of content: programs of quality, excellence, and diversity; in-depth reporting and commentary; the best of our society's culture and artistic expression. For many in public radio, mission has simply been shorthand for these content commitments.

With only a few exceptions, most notably the system's minority-oriented stations, *who* is being served has not been a part of stations' missions. Even as programmers have become more conscious of audience-related factors, concerns have been expressed in terms of the number of listeners, and the extent of their listening, rather than the composition of the audience as a whole.

AUDIENCE 88 demonstrates, however, that each content choice, together with form and style of presentation, generates a specific appeal that, in turn, defines an audience. While the audience consequences were almost never explicitly addressed — or even understood — public radio's pursuit of its content-oriented mission nonetheless has created a distinctive and measurable listener response that AUDIENCE 88 is now reporting.

What we see is the audience that public radio has defined by its programming — people who yearn for in-depth journalism and find public radio's selection of musical genres more engaging than those on commercial stations.

Public radio's programming, shaped by a content-oriented mission, has been the most important factor in defining the public radio audience.

People Define the Programming

More than mission is at work. Public radio was built on a foundation of stations licensed to educational institutions and staffed by people drawn to such institutions. Journalism, music, and cultural choices have been filtered through the standards and world view of the higher education community. In translating the broad outlines of mission to the specifics of programming, the culture and values of colleges and universities have been indelibly imprinted on the resulting service.

Stations that qualify for annual support from the Corporation for Public Broadcasting today are a more diverse group, including many stations held by community groups, and a small number of outlets controlled by, and designed to serve, minorities. Even so, the system as a whole remains steeped in its educational heritage. AUDIENCE 88's database, drawn to reflect National Public Radio's membership, tilts slightly more in this direction than public radio as a whole (see "Whose Audience," p. 6).

It should be no surprise, then, that the most powerful demographic indicator of public radio listening is education. The highly educated listeners at the core of public radio's audience are responding to a service that reflects the values, attitudes, and views of the academy — values held in high esteem by society at large and themselves in particular. In short, the service and the listeners are cast from the same mold.

Mixed Reactions

Many observers find in public radio's audience much about which to rejoice. Public radio is embraced by many of our nation's most informed and active citizens, people who shape our political, economic, and intellectual life. Public radio's listeners are the same people who use and nurture the institutions that preserve and advance our civilization, from the literary press to the theatre, from museums to volunteer social services. That public radio is also part of their lives is testimony to its role in society.

Further, whatever the profile of its audience, public radio is available to almost every citizen. It offers an open door to the concert hall and the press club, the texture of life in far corners of the globe, and dozens of other opportunities that are largely unavailable to the common man and woman.

At the same time, tax-based support for public radio fuels expectations of service for the public at large. The Corporation for Public Broadcasting's mission, for example, speaks of programming for "all Americans." Numerous constituencies claim public broadcasting has a special responsibility to address their particular needs and interests. Congress, from time to time, has encouraged or required special attention to particular groups.

The Need for Targeting

Universal use of public radio is impossible in the American system of broadcasting. Such a goal may be appropriate for the declining number of countries in which public-sector broadcasting has a monopoly on the airwaves. It is completely unrealistic for a mixed system of public and commercial stations, especially when the commercial sector enjoys overwhelming superiority in spectrum space, number of stations, and financial resources.

Instead, public radio is but one choice among many in a competitive, highly segmented radio marketplace.

To serve a niche, or market segment, effectively, a station, and public radio generally, must make choices about whom to serve. For many, that will be a difficult challenge.

Most of these decisions must be made by individual stations. The decentralized American system of public radio places ownership and programming decisions in the hands of local licensees. The majority of funding is expected to come from the local level. Stations' public service responsibilities are defined by the FCC in terms of meeting local needs.

The targeting question is theoretically wide open for each station. As a practical matter, however, the issue of whom to serve is, for most stations, largely a matter of fine-tuning — history, local context, and the availability of national programming have already resolved many of the major choices.

Public radio stations are not empty vessels into which one might pour a wide selection of programming choices. Stations are established by their licensees with at least a broad sense of direction already in place. They are funded by their licensees and others on the basis of expectations about the service they will provide. Their programming options are circumscribed by services already offered effectively by other stations in the market.

Further, a station's appeal can be strongly shaped by the national programming it elects to carry. For most members of National Public Radio, NPR's information programming is the most important single

factor shaping the station's appeal. The appeal of available national programming, which an individual station can influence only to a very limited degree, strongly shapes a station's targeting options.

In this framework, station choices about niche and segment are often a matter of decisions at the margin. Even changes that generate heated debate within a public radio station — say, dropping a major classical music daypart in favor of more information programming — represent but small shifts of focus within the broader spectrum of the broadcast enterprise. This is not to minimize the difficulty of the choices stations continually face but only to clarify the range of the realistic options for most.

Some choices go well beyond the marginal, of course. A decision to drop all or most information programming would cause a radical shift in appeal for most public radio stations. A format change from classical music to jazz, or jazz to bluegrass, would have significant consequences for the station's target audience.

There are also critical choices of whom to serve that can be made at the national level, where the constraints and opportunities take on a different cast. Public radio's national entities — funders, program producers, program distributors, and service providers — implement audience-targeting decisions through indirect means. By selecting which stations and programming to fund, what kinds of programming to produce and distribute, and which stations will benefit from services, national organizations shape each station's operating environment and influence local targeting decisions.

Because national entities work with numerous stations, it is feasible (if not always practical) for them to embrace service to a number of distinct audience segments without compromising the integrity and consistency of an individual station's programming. The Corporation for Public Broadcasting, for example, currently supports stations that, compared to each other, present programming of diverse appeal. National Public Radio and American Public Radio both provide programming services for stations with different formats.

This flexibility at the national level is both an opportunity and a problem. It allows national organizations to respond to more diverse needs and interests than an individual station can contemplate. At the same time, it legitimizes diverse demands that can easily outstrip resources.

Looking ahead, there may be a general reluctance on the part of both stations and national organizations to make explicit audience-targeting decisions. An important contribution of AUDIENCE 88, however, is to highlight the extent to which targeting decisions are *already* embodied in programming and funding decisions at the local and national level. The challenge ahead begins, not with new decisions, but with taking responsibility for choices already made. The next step is deciding whether to affirm those choices or change them.

TARGETING STRATEGIES

There are many ways in which public radio can use AUDIENCE 88's findings to target programming and to improve its effectiveness in reaching listeners.

We see several approaches for targeting a public radio service, ranging from the highly content-driven approach that has characterized most of public radio's efforts to date, to an appeal-based focus that would shape programming almost exclusively in terms of target constituencies that the station seeks to serve.

These approaches are linked. Content-based decisions have consequences in the resulting appeal of the service; appeal-based formulas will lead stations to particular areas of content. The priorities are clearly different, though, and that difference will be reflected in many decisions along the way to a station's goals.

AUDIENCE 88 does not tell managers and programmers what programming approach to adopt; it does not prescribe action in pursuit of a given approach. Instead, AUDIENCE 88 *informs decision making by linking actions to outcomes*. If a station wants to take a specific action, AUDIENCE 88 suggests the most likely results to anticipate. Conversely, if decision-makers want to achieve a specific result, AUDIENCE 88 suggests the actions most likely to yield that outcome.

Let Content Shape the Appeal

The traditional focus of public radio program decision making has been to define service almost exclusively in terms of content. Guided by a combination of mission and a desire to provide an alternative to commercial programming, a station would select the genre or genres of programming that, in turn, would shape its schedule.

AUDIENCE 88 suggests that these content-based decisions will translate to appeal for some segments of listeners and not for others, but it is the content, not the resulting appeal, that is the driving factor in this approach.

Many public radio stations will continue to rely upon a content-based approach centered on one or a few genres. A principal virtue of this strategy, in contrast to the appeal-based strategies discussed below, is its relative simplicity. Once one decides a particular genre of programming is, or is not, a part of the mix, a host of other decisions fall into place.

The principal limitation of a content-based strategy is that it may not result in a target of sufficient clarity to compete effectively in the radio marketplace. A station's niche in its radio market is defined by appeal. Content decisions alone, by sidestepping the appeal issue, do not necessarily define such a niche. They can — especially if a station pursues a single area of content. But given the diverse interests of most stations and their licensees, there is a continuing danger of presenting a diffuse, even incoherent image to prospective listeners — a consequence almost certain to result in less listening.

Whether the outcome of content-based strategies is a single focus or a multipart schedule, AUDIENCE 88 still provides important knowledge that can improve a station's effectiveness, the size of its audience, and the level of its listeners' satisfaction and support. The key step is to understand the appeal of the program content that is selected.

Such knowledge might be used to rearrange the program schedule, eliminating the most egregious shifts in appeal — what the AUDIENCE 88 *Programming* report called "appeal seams." A more sophisticated understanding of appeal can add subtleties to this endeavor, such as working with the understanding that appeal does not necessarily change when a station switches genre and that it can change substantially between elements that superficially appear related.

As outlined in the AUDIENCE 88 *Advertising & Promotion* report, an appeal analysis of the schedule can inform on-air cross-promotion strategies, such as selecting combinations of programs to promote from and to that are closely matched in appeal. Similarly, knowledge of appeal can inform off-air advertising decisions, such as selecting "appeal matched" vehicles for advertising.

The *Membership* report demonstrates how awareness of appeal can translate to more effective membership drives, including the kinds of language that will be most convincing to the different kinds of listeners who are attracted to different kinds of programming.

In sum, even if appeal plays almost no role in deciding *what* a station programs, knowledge of appeal can play a major role in *how* that programming is implemented, and in how a station shapes the broad range of its supporting activities.

Appeal-Based Strategies

Appeal-based strategies for service shift the emphasis from *what* is being presented to *who* is being served. For some, the notion of an appeal-based strategy implies programming designed to appeal to a single audience segment. Many of the proponents of appeal-based programming have just such a focus in mind.

But appeal-based strategies are no more confined to a clear market niche than their content-based counterparts. Just as a station may select several content areas for its work — with a resulting diffusion of appeal — a station may also select two or more different constituencies to which it hopes to appeal, perhaps through programming in a single content area, but more likely through several.

The broad concept of "specialized audience programming," for example, is one approach to appeal-based targeting aimed at meeting the programming needs and interests of several groups.

Targeting Appeal

A station that elects to target its service based on appeal has, on a theoretical basis, a wide range of choices. The adoption of appeal-based programming does not dictate any particular segment or any particular content. It is, rather, a framework within which to make such decisions. Public radio programmers would have many options.

Given the diverse appeal of current programming on many public stations, one obvious choice would be to identify the audience segment for which the station currently generates its strongest appeal and then focus the station's overall effort toward that segment. Such segments could be defined demographically (education, age, income, race), psychographically (Inner-Directed, Outer-Directed), or by other means. Programming that does not appeal to the target segment would be curtailed or eliminated.

A station could also center its programming appeal on groups now largely outside the public radio audience, again using demographic, psychographic, and other segmentation analysis. The farther one seeks to move from the current appeal, however, the greater the program changes required to reach the target.

Such decisions would need to be guided, as now, by a clear sense of mission. The challenge would be to expand the mission from the familiar points of *what* a station should deliver and to embrace the sometimes more difficult issue of *who* it intends to serve.

Focusing Appeal

AUDIENCE 88's analysis suggests that public radio stations will maximize their audience service, in both the *number* of people listening and the *amount* of listening, by presenting a program schedule with consistent, reliable appeal to one kind of listener. That does not mean only one kind of programming, nor does it ordain what kind of listener should be the target. Rather, it is the notion of reliable, consistent appeal that is important.

AUDIENCE 88 finds that the types of programming dominating public radio schedules do not share as much affinity as people have assumed. On many public stations, appeal changes dramatically over the course of the day and week.

As a consequence, stations are not seen as reliable — that is, always listenable — by any single audience segment, and thereby perpetually underserve their potential audiences. AUDIENCE 88 identifies this as one of public radio's major programming problems — and opportunities.

An effort to focus appeal would represent a departure from the combination of content-based decisions and multiple-appeal strategies that, together, guide most of today's public radio programming. This approach does place limits on content and presentation, just as the content goals and presentation styles with which public radio now works constrain audience targets for the present service.

More with Less?

Strategies to focus programming's appeal present a superficial paradox: how can audience service be increased by consciously excluding many potential listeners? The answer, in simplest terms, is that that's how radio works.

Since no station can be all things to all people, each targets the appeal of its programming at a segment of the market. This creates a diversity of appeal across stations that offers listeners greater choice of programming and greater satisfaction with their programming of choice.

But while diversity of appeal *across* stations increases listener satisfaction, diversity of appeals *within* a radio station decreases listener satisfaction. When appeal is constant, listeners can tune in regularly and be consistently satisfied. When appeal changes, as it does on most public stations, regular tune-in is discouraged because listeners don't always get what appeals to them. Occasions, or tune-ins, are discouraged. Appeal seams truncate duration. Time spent listening, a direct function of occasions and duration, is thereby reduced and along with it average quarter-hour audience. Listeners are far less likely to consider the station important in their lives; they are even less likely to support it financially.

Real-Life Constraints

Even if the programming logic makes sense, political and institutional imperatives can make it exceptionally difficult to say, explicitly, "We are no longer going to serve these people, in order that we can serve these other people better" — even if evidence strongly suggests the result would be to serve better a larger number of people overall.

Yet without such an explicit commitment, the programming discipline necessary to achieve appeal-based goals is unlikely to be achieved.

The problem of explicit targeting can be substantially ameliorated when more than one public radio station serves a community. To restate the point, diversity of appeal across stations increases listener satisfaction. If two or more public stations, each with focused appeal, together serve a range of audience segments, the results are more likely to be acceptable.

SELECTING TARGETS

In seeking to reach particular audience targets — for public radio nationally, for an individual station, or for a particular program — it is critical to explore whether the listener characteristics one hopes to achieve play a role in why people listen or only describe those who do. If it is the latter, the target one seeks to achieve may not be the key factor on which to focus one's strategy.

When people talk about targeting — not just radio, but most any service or product — the concepts that leap to mind are principally demographic: young or old, black or white, rich or poor, male or female.

Some demographic factors are clearly of major importance in targeting radio. Commercial stations, for example, target principally on the basis of age, sex, race, and attitudes. But people listen to a particular station, or to particular programs, for a host of reasons, of which these characteristics are but part of the mix.

Some demographic factors that are useful in describing radio listeners contribute almost nothing to an understanding of why those listeners listen. For example, a given percentage of a station's audience may have a very low personal income. That may be helpful to know in evaluating prospects for listener support or underwriting. But knowing someone's personal income does little to *explain* why these listeners are listening or to guide programming decisions that will reach them more effectively. Their personal income is most likely a reflection of other factors — perhaps age, race, education, or gender — that are more closely associated with their listening behavior.

AUDIENCE 88 data make it quite clear that the primary factor separating current public radio listeners from nonlisteners is education. AUDIENCE 88 also tells us that age and a person's values and lifestyle type are important, especially in further distinguishing those listeners who listen to one public radio format from those who listen to others.

AUDIENCE 88 also explored a long list of other personal characteristics of listeners, including gender, race and nationality, household income, social class, occupation, and political outlook. While all of these characteristics are useful in *describing* public radio listeners, they are of little utility in understanding listening behavior.

Once AUDIENCE 88 accounts for education, and education alone, these additional characteristics lose almost any power to *explain* why people listen to public radio's present service. And once AUDIENCE 88 adds to education the variables of age and VALS type, these other characteristics diminish substantially in explaining the use of particular formats within public radio.

Education, age, and VALS type correlate highly with each other, and with a host of other factors. The discussion of the demographics of VALS types on the following two pages illustrates the ways in which these many variables cluster together.

The central point is that changes in audience composition must be achieved through a focus on the factors that truly affect listening. A related implication is that efforts to achieve a particular demographic outcome through changing a key variable may produce a cascade of other consequences because of all the other factors that are linked to that variable.

THE DEMOGRAPHICS OF VALS

One of AUDIENCE 88's main contributions to our understanding of the radio audience is the introduction of VALS analysis as a way of looking at listeners. Analysis of values and lifestyles is one of the most powerful tools for understanding the appeal of public radio and its various program elements.

The various VALS types, such as Societally Conscious, Achievers, and Belongers, are quite different from each other demographically. By examining the demographic composition of the VALS types for which public radio has its strongest appeal, we can gain a better understanding of why public radio listeners are overrepresented or underrepresented in various demographic categories. Equally important, this information can inform the feasibility of various strategies to improve service for different demographic groups.

VALS sets forth a conceptual framework describing people's values and lifestyles in a way that helps explain why they act as they do, both as consumers and as social beings. The word *values* is used in the broadest sense and indicates the combination of a person's attitudes, needs, aspirations, beliefs, priorities, and prejudices. The four major VALS categories are hierarchical, running from Survivors at the bottom to Outer-Directeds, Inner-Directeds, and Combined Outer- and Inner-Directeds (Integrateds) at the top. These VALS categories are divided into nine groups.

Societally Conscious

AUDIENCE 88 has documented the powerful appeal of public radio's formats to particular VALS types, the Inner-Directed, Societally Conscious, and, to a lesser degree, the Outer-Directed Achiever. Societally Conscious make up 42 percent of the total public radio audience. Achievers make up 26 percent of public radio's total audience. As we move along the continuum toward more listening, stronger loyalty, and greater support of public radio, we find that the composition of the mixed-format type is even more heavily Societally Conscious.

AUDIENCE 88 has characterized Societally Conscious persons as having a profound sense of social responsibility, supporting such causes as environmentalism and consumerism; activists who are impassioned and knowledgeable about the world around them and perhaps attracted to simple living. They probably participate in the arts and attend cultural events. They may travel often, for business and pleasure, are likely to use credit cards, probably enjoy outdoor sports and activities, read a lot, watch little television and are concerned with energy conservation.

Let's take a closer look at this VALS type, which forms such a critically large component of public radio's audience and is so much a presence in public radio's core listenership. In 1978, it is estimated that the Societally Conscious population was at 6 percent of the total U.S. population. By 1980 this group had grown to 8 percent (from 9 million to 13 million), and estimates for 1990 place it at 11 percent of the population (20 million).

Societally Conscious are the best educated of the nine VALS groups. Sixty percent are at least college graduates and a striking thirty-nine percent have attended graduate school. The Societally Conscious are resistant to placing themselves in a neat political box, and although they tend to be on the liberal side, a significant minority, 28 percent, are more conservative than middle of the road. These people hold jobs that reflect their educational levels — 59 percent are in professional or technical positions. Their incomes are concentrated in a comfortable living range, with over half the group in the $15,000 to $40,000 range. While only 2 percent have incomes over $75,000, only 7 percent have incomes under $10,000.

Regionally, Societally Conscious people are overrepresented in New England and the Pacific states. The ethnic pattern of the group is 87 percent white, 7 percent black, 1 percent Hispanic, and 5 percent other ethnic groups. This last percentage for "other" is large relative to the sample size as a whole and there are a high number of blacks compared to other Inner-Directed types.

Achievers

What of public radio's second largest VALS group — Achievers? This group is characterized as affluent, driven, a group that has built our economic system and provides much of the leadership in business, the professions, and politics.

In absolute numbers, Achievers have remained a steady 35 million in the overall population, and estimates for 1990 are 36 million (20 percent of the population).

Achievers are the most conservative VALS group, with 58 percent calling themselves Republicans. Over two-thirds have gone beyond high school, 18 percent hold college degrees, and another 16 percent have attended graduate school. More than any other VALS type, Achievers hold managerial or administrative positions (17 percent), with 29 percent holding professional or technical positions. Achievers are the most affluent VALS group, with an average income of $31,377. Only 9 percent have incomes under $15,000 a year, and 10 percent have incomes of $50,000 or more. Over half the Achievers have a household income of $30,000 or more; this results in Achievers dominating the high income brackets.

Achievers, like the Societally Conscious, are most overrepresented in New England and the Pacific states. The high proportion of Caucasians in the Achievers group is matched only by one other VALS group. Ninety-five percent of the Achiever group is white, with under 2 percent black, a little over 1 percent Hispanic, and a little over 2 percent composed of all other ethnic groups.

Implications

How does this tie in with the appeal of public radio?

The people to whom public radio appeals most strongly have the income — and the sense of comfort within that income range — that allows them to give, and give generously, to public radio. These VALS groups are employed in decision-making positions throughout the business and service sectors, a good sign for public radio's efforts to obtain increasing amounts of business support and other underwriting.

Societally Conscious, the group that responds most strongly to public radio, is the fastest growing population of any VALS group. Achievers, already a large segment of the population, are also increasing in absolute numbers although holding constant as a percentage of all Americans.

The demographic element of concern in this picture is the ethnic composition of these two VALS types. Blacks, Hispanics, and other ethnic groups are underrepresented in both the Societally Conscious and Achiever groups with respect to their presence in the overall U.S. population. This compounds the skew which already exists for these groups with respect to educational levels.

With public radio's current service so strongly keyed to these two VALS types, it will require special efforts to achieve "proportionate" service to Blacks, Hispanics, and other ethnic groups.

An excellent example of the way in which these points affect targeting strategies is the extent of public radio's service to black listeners. While 11 percent of Americans 18 years of age and older are black, six percent of the listeners in the AUDIENCE 88 sample are black. Blacks are about half as likely as whites to listen to public radio.

Is this because public radio is in some way appealing to whites while it is not appealing to blacks? AUDIENCE 88 suggests a different reason. As noted throughout this report, education is the strongest predictor of public radio use — the more education people have, the more likely they are to be public radio listeners. In this context, it is critical to understand the significant differences between blacks and whites with respect to educational attainment.

According to U.S. Census data, 19 percent of whites have attended at least four years of college, but only 9 percent of blacks have done so. Blacks are half as likely as whites to have completed four years of college. Education, not race, appears to account for most of the differences between black and white listeners in the public radio audience. Put another way, public radio is just about as likely to reach educated blacks as it is to reach educated whites.

Education does not account for all of the difference, of course. Even among educated listeners there are differences in taste and style. We noted, for example, that jazz has an especially strong appeal to black listeners.

But any effort to increase the percentage of blacks in the public radio audience that does not take account of current programming's strong appeal to educated listeners is unlikely to succeed. At the same time, any strategies to change the educational appeal of current programming to reach a higher percentage of blacks is likely to affect listening by many other groups as well.

It is important to emphasize that AUDIENCE 88 only documents the predictive power of education, age, and VALS type with respect to public radio's *current* programming. The further one gets from such programming, the less one can rely on these factors. They may continue to be especially important; they may not. AUDIENCE 88 data simply do not address the question.

Targets That Make Sense

With all the emphasis that AUDIENCE 88 places on appeal, demographics, segments, utiligraphics, and the other details of radio broadcasting, it is easy to lose sight of the underlying purposes that must inform and direct public radio's work.

There are countless audience targets that a public radio station might seek to serve. There are all kinds of music, information, and other programming that might appeal to those targets with a greater power than current programming. If the purpose of public radio were simply to attract as many ears as possible, any and all such targets, and the programming to reach them, might be appropriate.

Public radio is not a neutral enterprise. It is accorded a special place on the spectrum, and is funded with public dollars, to play a special role in our society. That role may at times seem elusive, but it is heard in the poetic ring of stations' missions that speak of preserving the best of our civilization's culture and ideas, of enriching our society by highlighting the best of contemporary art and thought, of helping citizens take an informed and active part in the democratic governance of our communities and the nation. It can be felt in the vision and dedication of the men and women who as professionals and volunteers staff and sustain public radio through a sense of commitment to a larger purpose.

As public radio chooses its targets of whom to serve, as it devises the programming that will appeal to those targets, the foundation of those decisions and, indeed, of the appeal itself, must rest firmly on the mission of public service.