
AUDIENCE

88

THE PICTURE EMERGES

Public radio serves many Americans extraordinarily well. Each week over four million listeners make a public radio station their favorite station—by listening to it more than any other service available on the radio dial.

Public radio serves more Americans than we have thought. Over the course of a year, over 25 million listeners will listen to a public station.

Public radio serves most Americans not at all. Over 88 percent of radio listeners will make it through the year without once giving public radio more time than it takes to decide they really want to listen to something else.

Radio is a mature, highly competitive, and highly segmented enterprise. The most successful stations aspire to reach but a portion of the listeners in their community. The average American has dozens of stations from which to choose, and in a typical week will listen to less than three.

AUDIENCE 88 indicates that there are significant, measurable differences between listeners who choose public radio and those who do not; that there are similar differences among those who make a public station their favorite and those who just sample its programming; and that these differences extend to the kinds of listeners who are attracted to the distinctive formats and services that public radio offers.

The purpose of AUDIENCE 88 is to tease out these differences in a variety of dimensions—demographics, values, use of radio—and apply the findings across all areas of station operations: to make programming more effective, to set realistic goals and appropriate targets for advertising, to sharpen appeals for listener support, to strengthen the case for corporate underwriting, and, at the broadest level, to inform the allocation of national

funds for station support, new programming, system expansion and diversification, and further research.

After months of crunching numbers, sifting through charts and tables, testing hypotheses, and relinquishing a few cherished notions of how things “ought” to be, the portrait of the audience we set out to capture, like a photograph in a darkroom, is emerging with clarity and crispness.

LISTENERS & LISTENING: A DIFFERENCE

When we talk about “listeners,” we are usually referring to the *cume*, the cumulative total of all people who listen over the course of a specified period, usually a week. Nationally, public radio’s listeners are currently estimated at 11.7 million people each week.

These listeners have all sorts of relationships with their public radio station. For some, public radio is practically a member of the family; for others, it is an occasional guest; for many, it is but a passing acquaintance.

The difference in their “listening,” which is measured in quarter-hour increments. In any one quarter hour (between 6 AM and midnight), it is estimated that an average of 721,800 listeners are tuned in to public radio. A little math yields the formulation that public radio’s 11.7 million listeners are investing 91 million hours of time with our stations each week.

All this points to an “average listener” spending 7.8 hours with his or her public station. But as is so often the case, averages can be misleading. To peek behind the averages, AUDIENCE 88 sorts listeners by their *utiligraphics*, how they actually use public radio.

Continued on p.3

THE AUDIENCE 88 DATABASE

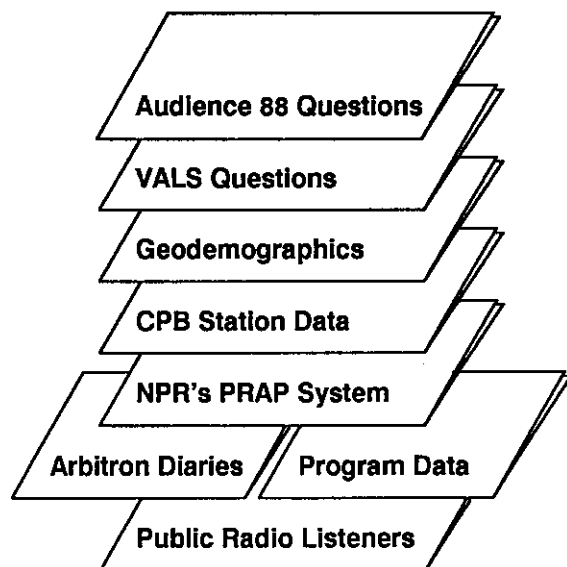
USING THE NUMBERS

AUDIENCE 88 is a national study, and each station will want to use care in applying the results to its local situation. At the same time, it is important to resist the temptation to reject uncomfortable findings with a too-quick conclusion that "my station is different."

At each step of analysis, the AUDIENCE 88 team has scrutinized the data to ascertain whether a particular point applies to all programming or only certain formats, to all stations or only those in certain markets or with certain budgets.

Most listeners in the sample, like most listeners nationally, come from larger markets. But the sample also draws from Eugene, OR, Tallahassee, FL, and the upper Michigan peninsula. Perhaps the two dozen CPB-qualified stations serving markets with fewer than 50,000 listeners should hold the study at arm's length; but most everyone else is accounted for on the basis of market size.

Similarly, the study was confined to NPR members, and many of the results are shaped by the powerful appeal of NPR's news magazines. But most of the 50 CPB-qualified stations that don't use NPR programming present news and music that reaches the same kinds of listeners as their NPR colleagues.



...AND WHERE THEY COME FROM

The database is founded on 6,315 Arbitron diaries kept by listeners to 72 National Public Radio member stations in 42 markets across the country. Representative of licensee types, market situations, and program emphasis of NPR's full membership, this sample is the basis for the national program and format estimates produced in 1986 by NPR's Public Radio Audience Profile (PRAP) system.

The diaries record how listeners use radio in general and public radio in particular. By tracking what each public radio station had on the air when listeners were listening, PRAP produces audience estimates for specific programs and formats.

Since stations operate in different environments, with various levels of resources, information is included about the individual stations, including market size, the amount of time they devote to various programs and formats, and income, expenses, and budget growth rate over a multi-year period.

This station and listening information is overlaid with extensive data about the listeners themselves, beginning with three powerful geodemographic and lifestyle tools—PRIZM, ClusterPlus, and VALS.

Each of these commercially accepted systems segments the audience into groups of people based on *where* they live (geodemographics) or *how* they live (values and lifestyles).

This information is complemented by data gathered in AUDIENCE 88's own survey, completed by 4,268 listeners. The questionnaire ascertains a variety of demographic data such as age, gender, race, occupation, education, and income. To these conventional measures are added questions that explore listeners' relationships with their public radio stations. Listeners disclosed how they first learned about their public station, whether they or anyone in their household have contributed money within the last year, what they think about underwriting and underwriters, and how important they feel the station is to them and their community.

Continued from p. 1

Core and Fringe. One test is whether public radio is a listener's favorite station. How do we know? By his or her listening. If someone listens to a public station as least as much as or more than any other station, we conclude that the public station is that person's favorite, and we call them a "core" listener. If some other station is their favorite, we place them in the "fringe" audience.

Heavy and Light. A second test is how much time a person spends with their public station, favorite or not. We drew a somewhat arbitrary line at six hours per week. Listeners that listen six hours or more are dubbed "heavy" listeners. Others are called "light."

	<i>Percent of Listeners</i>	<i>Percent of Listening</i>
Heavy Core	27.8	66.2
Light Core	9.3	4.4
Heavy Fringe	11.7	14.6
Light Fringe	51.3	14.8

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, the "light fringe," half of public radio's weekly listeners, listen more to some other station, spend less than six hours a week with their public station, and account for only 14.8 percent of all listening.

These are not static constituencies. While some people have stable long term listening patterns, others change their usage over time. When AUDIENCE 88 went back to our sample of public radio listeners nine to twelve months after their listening was first measured, 12 percent said they had not listened to their public station in the past 30 days. Even among the "heavy core," public radio's most loyal listeners, 5.5 percent had, at least temporarily, dropped out of the audience.

Samplers. At the same time some people are moving out of the audience, others are moving in. The weekly cume estimates the total number of listeners over a seven-day period, but how many *new* listeners tune in on the eighth day? By the end of a month? By the end of a year?

Assuming no major changes in programming,

AUDIENCE 88 uses a mathematical projection technique to estimate that public radio's cume will grow by 4 percent on the eighth day, by 42 percent at the end of a month, and by 113 percent by the end of a year.

In other words, over the course of a year, more than twice as many people will listen to public radio as those that we capture in the seven-day snapshot of the weekly cume.

The additional listeners, who we have called *samplers*, fall into the same utiligraphic segments outlined above. Not surprisingly, the overwhelming majority of them are "light fringe" listeners. The "light fringe" group grows by 75 percent within a month, and more than triples over the course of a year. On the other hand, very few of the samplers turn out to be "heavy core" listeners; the group expands by only 1.2 percent in a month, and only 3.5 percent over a year.

Building Our Audience. There are some startling implications in all this. Most of those who will find public radio their favorite station, and listen a lot, have already found it and are already listening. In fact, of all people who will give public radio a "heavy core" commitment over the course of a year, 76 percent will be listening the *first day* a count is made!

Estimates of public radio's core listeners are based on current programming. If this group is to expand, listen longer, or listen more often, it will take programming changes to do the job. Strategies to build this core group will be at the heart of the AUDIENCE 88 *Programming* report.

At the other end of the continuum, there are millions of Americans that public radio touches in a light and sporadic fashion. Advertising and promotion techniques aimed at increasing the frequency of public radio use by the "light fringe" and "samplers" is a key concept of AUDIENCE 88's *Advertising and Promotion* report.

Perhaps the most important implication of AUDIENCE 88's utiligraphic analysis, however, is a question it provokes. Why do some people listen so much, others so little, and so many not at all? To get at the answer, we should first look more closely at the listeners themselves.

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 35-44 year old age bracket—America's best-educated age group.

Looking beyond demographics, AUDIENCE 88 has broken new ground by developing values and lifestyle 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 whole, have a strong sense of social responsibility, and act on their beliefs; they are 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.

AUDIENCE 88 also makes it possible to sort out differences *within* the public radio audience. By searching for distinctions along the continuum from "light fringe" to "heavy core," we can further sharpen our knowledge of the public radio audience.

As we move toward public radio's "core" listeners, the Societally Conscious personality profile and a person's education take on even more de-

scriptive power. Over half of public radio's "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 other listeners ("heavy") and are more loyal ("core"). Over 70 percent of public radio's "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.

A SPECIAL KIND OF APPEAL

What prompts public radio's "different kind of listener" to respond when others do not? The answer, simply and overwhelmingly, is public radio's programming: its content, form, and style of presentation.

Each format and program sounds a complex chord—an explicit and implicit mix of vocabulary and syntax, genre and allusion, politics and poetics—that resonates with some listeners and rings hollow with others. In fact, AUDIENCE 88 shows that each strand of public radio programming has its distinctive *appeal*, its unique resonance with a particular constituency of listeners.

A few examples make the point. Classical music appeals to Inner-Directed listeners, while opera is stronger with Outer-Directed listeners. Opera and classical music draw public radio's oldest audience, while jazz has its greatest appeal for listeners under 34 year of age. Or cutting it very fine, *Morning Edition* has a somewhat greater appeal for the 35-44 age bracket, and somewhat less appeal for older listeners, than its NPR companion, *All Things Considered*.

The foundation of programming strategy is the shaping of program appeal into a sound, a viewpoint, an attitude that reflects the station's mission and that speaks to listeners with a compelling and coherent voice.

The Demographics of Utiligraphic Segments.

Listeners for whom a public radio station is their favorite (core) are better educated, more likely to hold professional or technical jobs, and live in higher income households than people for whom a commercial station is favorite.

	Percent of each Utiligraphic Segment:			
	Heavy Core	Light Core	Heavy Fringe	Light Fringe
18-24 Years Old	4.9	1.9	2.8	6.4
25-34 Years Old	23.4	22.2	24.4	25.8
35-44 Years Old	29.6	34.1	27.3	21.5
45-54 Years Old	14.6	15.2	15.6	13.8
55-64 Years Old	12.7	14.5	16.9	14.4
65 Years Old or Older	14.9	12.2	13.0	18.1
Did not Graduate H.S.	2.7	2.2	1.7	4.4
Graduated High School	6.4	7.4	14.1	15.1
1-3 Years College	19.8	14.9	28.6	25.2
Completed College	24.6	20.6	22.9	24.5
Attended Grad. School	46.5	54.9	32.8	30.8
Professional-Technician	48.4	49.9	38.1	38.6
Manager-Administrator	10.3	10.5	11.3	11.2
Other Employed	13.7	13.7	23.2	20.9
Homemaker	6.7	10.2	7.5	9.0
Student	6.4	3.2	5.7	4.9
Retired	14.4	12.6	14.1	15.4
Less than \$10,000	8.2	5.2	7.1	10.7
\$10,000-\$19,999	13.7	6.9	13.4	13.0
\$20,000-\$29,999	15.8	15.9	12.7	18.1
\$30,000-\$39,999	15.1	16.5	21.3	14.5
\$40,000-\$49,999	15.0	16.5	14.8	13.5
\$50,000-\$74,999	17.7	24.4	21.4	19.7
\$75,000 or More	14.7	14.6	9.2	10.7

The Values and Lifestyles of Utiligraphic Segments.

Core listeners are more likely to be inner-directed—particularly Societally Conscious.

	Percent of each Utiligraphic Segment:			
	Heavy Core	Light Core	Heavy Fringe	Light Fringe
Need-Driven	13.4	12.8	16.2	21.0
Survivor	1.7	1.0	1.9	1.3
Sustainer	.5	.9	1.2	.8
Belonger	11.2	10.9	13.1	18.9
Outer-Directed	23.3	24.2	31.4	30.9
Emulator	2.2	.7	4.0	3.2
Achiever	21.1	23.5	27.4	27.7
Inner-Directed	63.4	63.0	52.3	48.0
I Am Me	3.6	1.6	2.0	4.8
Experiential	7.8	4.9	6.1	10.0
Societally Conscious	52.0	56.5	44.2	33.2

THE "ELITISM" ISSUE

AS AUDIENCE 88 findings filter through the public radio system, we are hearing concerns about how narrow a segment of society is found at the core of public radio's audience, and about how "elite" public radio's audience appears. How did this come to be? Is it a problem? And if change is desirable, what are the opportunities?

PROGRAMMING DEFINES THE AUDIENCE

Public radio has been guided 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.

Even as programmers have become "audience aware," 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.

AS AUDIENCE 88 makes clear, however, 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 audience response that AUDIENCE 88 is now reporting.

What AUDIENCE 88 is reporting is the audience 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 here. America's public radio system was built on a foundation of stations licensed to colleges and universities and staffed by the people drawn to these institutions. Journalism, music, and cultural choices were filtered

Continued on p. 8

ADVERTISING AND PROMOTION

CRAFTING AN INTELLIGENT INVESTMENT

When discussion turns to advertising and promoting public radio, the focus is usually on the method. Should we go with the newspaper or buy billboards? Should we try a concert or do a booth at the street fair? Do we want slick copy pushing national news stars or more folksy pictures of station staff? And how much should we invest, or, more often, is this all we can afford to spend?

AUDIENCE 88 tells us that other issues may be much more critical.

While the *how* of advertising and promotion is important, the more fundamental concerns are *what* your advertising and promotion efforts can realistically accomplish, and with *whom* you can achieve an impact that justifies the effort. Approach, style, and budget are key—but these decisions follow, rather than lead, an effective advertising and promotion strategy.

Effective targeting—reaching the right people with the right message—determines the success of any advertising and promotion effort you undertake.

TARGETING

AUDIENCE 88 finds that some people use public radio a great deal (the "core" audience); that other listeners tune in only occasionally and for limited periods (the "fringe" and "samplers"); and that most people will never listen to public radio's programming because it simply has no appeal to them.

This sorting of listeners is the foundation of an intelligent advertising and promotion investment.

Working from the "outside" toward the "core," we must begin by eliminating true non-listeners from our sights. No amount of advertising or promotion will persuade them to listen to something they don't want to hear. They haven't the slightest inclination to listen—they really prefer something else.

Accepting this fact, we can get to work on investing public radio's scarce advertising and promotion dollars on an effective, targeted effort to affect the millions of listeners for whom we do, in fact, have something to offer.

The occasional listener, found in the "fringe" and "sampler" groups, is the prime target for *advertising* and *off-air promotion of specific formats and programs*. The goal is to hasten the listener's next tune-in.

The regular listener, now at the heart of public radio's constituency, is the target of most *on-air promotion* and *promotional events*. The goal of *on-air promotion* is to increase this listener's time spent listening. The goal of *promotional events* is to strengthen this listener's relationship to the station in order to encourage his or her support.

Linking advertising and promotion techniques to specific purposes helps us to understand their strengths and limitations. It is an important step toward making our activities as intelligent and as cost-effective as possible. AUDIENCE 88 takes another stride by detailing the demographics, values, and lifestyles of the people we want to reach for each purpose.

THE OCCASIONAL LISTENER

Occasional listeners, dubbed "samplers" by AUDIENCE 88, already have an inclination to listen, albeit not that often. They tune in less than once a week (and most thus fall outside a station's weekly cume), but at least once a year. Accelerating "samplers'" next tune-in gives your station a head start on making them more frequent listeners.

We cannot realistically expect "samplers" to make the giant leap to the "heavy core," but we have a real opportunity to accelerate the frequency of their sampling. They know who we are and something of what we do, but, like others with a premium product, we need to prod them along: "I could have had a V-8," "Come to think of it, I'll

have a Heineken."

The samplers most likely to be enticed to tune in more often are probably similar to the people who already listen regularly: most are 25 to 44 years of age, well-educated, upscale professionals and managers who place a high value on information, see themselves as thinkers, and are concerned about or play a leadership role in their community and society.

Words and phrases that appeal to such people include: "something special, quality, inspired, important, intelligent, informative, distinctive, unmatched in quality, and attention to detail." Consider images and graphics that reflect the attitudes and lifestyles of public radio listeners. Rich colors and/or striking contrasts would be appropriate. Meaningful, thought-provoking graphics, with symbolic images or famous places and people, should be employed.

As for media placement strategies, advertising in business magazines may be the most effective use of ad dollars in one instance, but not as effective as targeted direct mail or bus and subway cards in another. AUDIENCE 88 not only helps determine what to say and how to say it, but gives us clues as to where to place our advertising messages.

THE REGULAR LISTENER

Of the wide range of promotion tools available to a station, the most effective and least expensive is the station's own programming. Top-rate programming inspires word-of-mouth promotion by loyal, satisfied listeners. It captures people as they tune across the dial. Most important exciting and high quality programming encourages more listening by regular listeners.

On-air promotion of great programming will also increase listening by your regular listeners. By telling listeners about programming of interest scheduled at some other time, you are helping them use your station. But they will not respond if the programming you promote holds limited or nonexistent appeal for them.

AUDIENCE 88 identifies what programming to cross-promote, and when. For example, information programming's prime appeal is to highly educated,

upscale people between 35 and 44 years old. Roughly half of the audience is composed of Inner-Directed, Societally Conscious people; another quarter are Outer-Directed, Achiever individuals. Opera's appeal, in contrast, is to listeners 65 years or older, with a far greater spread in terms of education and income. Most notably, opera appeals to public radio's most Outer-Directed listeners, with Belongers, Emulator's, and Achievers composing well over half of its audience.

In short, information and opera programming appeal to two different types of people. This knowledge indicates how relatively ineffective it would be to cross-promote an opera program in the middle of *All Things Considered*.

Looking at a different example, *Prairie Home Companion* listeners have demographic and psychographic profiles running right down the middle of public radio's news and information audience. Cross-promotion between these two seemingly disparate program elements would make a lot of sense.

AUDIENCE 88 confirms that most people discover public radio by scanning the radio dial or heeding the advice of a friend or colleague. AUDIENCE 88 also confirms that programming, not a sense of community importance or "snob appeal," is the reason people listen to public radio. Further, member support is most directly associated with listeners' use of programming and their sense of its importance to them.

For these reasons, promotional events have very little chance of getting people to tune into a station, or to contribute to it, because of the event itself.

Effective promotional activities, however, can encourage loyal listeners to become members—by giving them a closer connection to the station. Concerts, street fairs, food drives, and other *promotional events cement the ties between a station and people who already listen.*

The most compelling reason to invest in these activities is to turn listeners into members by "softening them up" for the next time you pitch on the air or send them a direct mail piece, or even by convincing them—on-the-spot—to write a check.

THE "ELITISM" ISSUE

Continued from p. 5

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 those institutions were indelibly imprinted on the resulting service.

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.

IS THERE A PROBLEM?

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

And for all the upscale tilt of those who listen, public radio is available to 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 speaks of programming for "all Americans."

There are numerous constituencies that can rightfully claim that public broadcasting offers their best, if not only, hope for responsive service from the broadcast media. As important, the capacity to define what constitutes "the best" in cultural and information programming is not the province of academic institutions alone.

THINKING ABOUT CHANGE

If the public radio system wants to change the composition of its audience, it must do so by addressing the factors that shape its programming.

One path is to diversify ownership in the system. By fostering alternatives to the educational institutions that dominate the licensee pool—through changes in current governance structures or the addition of new licensees—public radio can introduce new perspectives to the ongoing discussion of quality and excellence that drives programming decisions.

A related approach focuses on the workforce. The vast majority of public radio's first generation of station staff are educators who brought their culture and personality to the noncommercial airwaves and have drawn listeners much like themselves. Add to this mix a new generation of professionals with other backgrounds, views, and tastes, and public radio's service will develop a different audience appeal.

Finally, stations should consider returning to the basic formulation of their mission, with an eye to incorporating audience targets, and recasting the goals for content accordingly. AUDIENCE 88 gives licensees the information and capacity to think in these terms. It would be a long step from public radio's content-oriented roots, but the one most likely to produce a significant redefinition of the audience.

AUDIENCE 88 will return to these issues in detail in the final publication of the series, *Issues & Implications*.

This AUDIENCE 88 Update was written by Tom Thomas and Terry Clifford, with David Giovannoni and Linda Liebold, and funded by the Corporation for Public Broadcasting.

Coming in June from AUDIENCE 88:
Programming, by David Giovannoni.
Advertising, by Linda Liebold.