



3.

Rounding Up the Usual Suspects

Does public radio appeal to the children of Baby Boomers? Is public radio serving racial and ethnic minorities? Will classical music's older listeners die soon? And if so, will they take classical music with them?

Like *Casablanca's* police prefect Louis Renault, AUDIENCE 98 rounds up these usual suspects, knowing full well they aren't the genuine culprit.

Public radio's audience is a virtual community of **educated** Americans drawn by the values, beliefs and interests of its programming. Age and sex, racial and ethnic background, income and social status – each and every one is a phony suspect – a beard, a shill – subservient to the real mastermind: education. Education lurks behind the answer to every question about the audience.

The usual suspects, however, continue to distract us. Once again, it's time to line them up and expose them.

Public Radio's Minority Audiences

The most important thing to understand about public radio's minority audience is this:

There **is** one.

In fact, **there are many**.

One-in-seven listeners identify themselves as being other than white. That's over three million minority listeners tuning in each week – double the number of 10 years ago.

The second most important thing to understand is what serves these listeners:

Most listen because of their interest in public radio's hallmark programming.

Efforts to “target” minority audiences are not without merit or success. But public radio serves more minority listeners – and generally serves them better – with the news, information, and entertainment programming for which it is best known by **all** of its listeners.

The remaining point to take away is this:

Public radio's minority audience will continue to grow because the college-educated minority population will continue to grow.

In sum: Public radio's service to minority audiences has never been greater. All signs point to even more minority listeners seeking what public radio does best: programming that transcends racial and ethnic differences, programming that embraces the values and attitudes of an educated citizenry.

Two Service Strategies

To address the future, we must understand the two distinct strategies through which public radio attracts and serves minority listeners today.

The first strategy ignores demographic distinctions of age and sex, race and ethnicity. In its

best moments it **transcends** racial and ethnic differences. It focuses on virtual communities of listeners who share the values and attitudes formed by their educational experience.

The second strategy **targets** listeners who share certain racial or ethnic characteristics. It focuses primarily on persons with these characteristics.

The Strategy To Transcend

Thirty years ago, public radio set forth a beacon of public service to advance understanding among people of good will; to unite rather than divide; to include rather than exclude; to transcend races and creeds, origins and situations.

The mission embodied in this strategy holds as self-evident that a person's character, values, and attitudes are more relevant than one's racial or ethnic background. It emphasizes the similarities among people rather than their differences.

Most public radio programming embraces this mission. And it serves minority listeners well. Indeed, most minority listeners are drawn to public radio for its hallmark news, information, music, and entertainment programming.

When measured by their character, public radio's minority listeners have more in common with other public radio listeners than with non-listeners who share their ethnic or racial backgrounds.

Formal education sets them apart.

So do their attitudes and values – most clearly viewed through the VALS 2 personality types.

Indeed, **character, attitudes, and values are at the heart of this transcendent appeal**. As

we move forward with policy and programming initiatives:

- We would be right to accept that most public radio listening is to programming that seeks to transcend. This is as true for minority listeners as it is for others.
- We would be wrong to compromise this programming's appeal by bending it toward the strategy to target. These two strategies are incompatible in the same program stream.
- We would be right to assume that the strategy to transcend is well aligned with powerful demographic trends among America's minority populations.

The Strategy To Target

Other minority listeners are served by a strategy that beckons to people of specific racial or ethnic backgrounds.

Targeted policy and programming initiatives are at the heart of this strategy – adjusted through the years as we've learned how best to implement it:

- We were right to create programming to address the needs and appeal to the values, attitudes, and lifestyles of these listeners.
- We were wrong to broadcast this programming on stations that serve other listeners most of the time (i.e., stations employing the strategy to transcend).

- We were right to encourage full-time services to these listeners – especially in markets with several public stations.

A Powerful Combination – A Powerful Contradiction

In geographic communities where stations seek to serve different audiences, the two strategies offer a viable public service combination. However,

the strategy to transcend racial heritage and the strategy to target it are at direct operational odds.

They serve such vastly different audiences that they **do not** and **cannot** serve the public when implemented on a single station.

The strategy to transcend racial heritage and the strategy to target it are at direct philosophical odds.

The targeting strategy emphasizes **differences in our racial and cultural backgrounds**. The transcendence strategy emphasizes **similarities in our characters**.

Is one strategy **better** than another? AUDIENCE 98 cannot inform this philosophical and political debate.

However, AUDIENCE 98 **can** tell us which strategy is currently **more effective**.

– Frank Tavares
– David Giovannoni

Public Radio's Minority Audiences

Triangulating on Today's Minority Audiences

Measuring minority listening poses a number of challenges, as many Americans are mixtures of race, ethnicity, and cultural heritage.

No two sources agree on an exact number of minority public radio listeners. However, by triangulating on several points, we conclude that **12 to 15 percent of public radio's listeners – about one-in-seven – claim membership in a racial or ethnic minority group.**

Triangulation: Point 1. "Profile 98" – published by National Public Radio and based on Simmons' Spring 1998 "Study of Media and Markets" – estimates that 14.7 percent of public radio's listeners identify themselves as something other than "White."

Triangulation: Point 2. From Arbitron's Fall 1996 survey (upon which AUDIENCE 98 is based):

- At least 8.8 percent of all public radio listeners say they are "Black."
- At least 3.5 percent of all public radio listeners say they are "Hispanic."

Source: Public Radio Recontact Survey, starting sample.

These numbers are **minimums**. Arbitron measures and reports all listening by all people, but it does not ascertain every listener's race or ethnicity. Therefore, some radio listening by

Black/African American and Hispanic/Latino listeners, and all listening by Asian/Pacific Islander and Native American/Indian listeners, is recorded but simply not tagged as such.

Triangulation: Point 3. The Public Radio Recontact Survey (upon which AUDIENCE 98 is based) finds many people defined as "Black" or "Hispanic" in the Arbitron survey **refine their self-identification** as "Other/ Mixed." Across this wide and representative sample,

- Five percent identify themselves as "Black/African American"
- Two percent identify themselves as "Hispanic/Latino"
- Two percent identify themselves as "Asian/Pacific Islander"
- Less than one percent identify themselves as "Native American/Indian"
- Three percent identify themselves as "Other/Mixed"

Source: Public Radio Recontact Survey, responding sample.

These independent measures triangulate on a 12-to-15 percent range of public radio listeners who identify themselves as something other than "White/Caucasian."

– Jay Youngclaus
– David Giovannoni

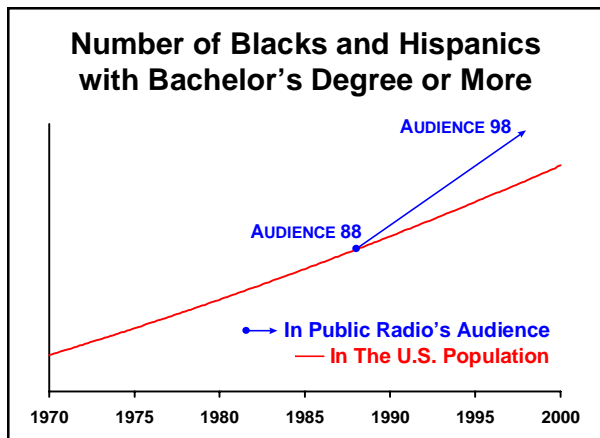
Public Radio's Minority Audiences

Populations Trends

Driven by the strategy to transcend, the single most defining characteristic of public radio's audience today is its college education. If it remains so into the future, **public radio can expect to serve even more minority listeners tomorrow.**

As the number of well-educated minority citizens grows, so grows public radio's minority audience.

The graph below shows the number of black and Hispanic Americans who have earned at least a bachelor's degree – a number that has increased nearly **six-fold** in the last 30 years.



The upward trend is evident, and demographers expect it to continue.

The growth in public radio's black and Hispanic audience over the last 10 years is calibrated to the population line (AUDIENCE 98 compared to AUDIENCE 88).

Clearly, public radio's service to black and Hispanic audiences is growing even faster than the

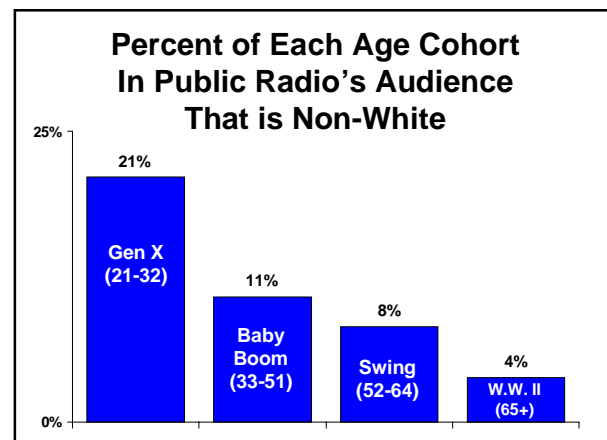
college-educated minority population.

The conclusions are obvious.

- Powerful population trends are certainly contributing to public radio's minority service, and there is every indication that they will continue to do so.
- Public radio has gotten better and more readily available in the last 10 years, thereby causing a **rate of growth in minority service that outstrips even the most powerful demographic trends.**

Whether we continue investing in these improvements and enhancements is up to us. The cost of riding the demographic trend is free.

The graph below shows the combined impact of these forces in a snapshot of today's audience. Younger listeners, like younger Americans, are most likely to claim membership in a racial or ethnic minority group.



– Jay Youngclaus
– David Giovannoni

Public Radio's Minority Audiences

You Get Who You Play For

It's true. Programming causes minority audiences the same way it causes people of any kind to become listeners.

People who visit public radio seek the values imbued in its programming. This is every bit as true for **public radio's minority listeners – who are more like other listeners than their families and friends who don't listen.**

That's a significant statement. Because it reminds us that **listeners are best understood by what draws them to us – and not by where they come from.**

Two distinct programming, distribution, and policy strategies draw them to us – the strategy to **transcend** distinctions of racial and ethnic heritage, and the strategy to **target** them.

Today the strategy to **transcend** serves more minority Americans than does the strategy to **target**. However, the success of each strategy must be assessed in its own terms.

The Strategy to Transcend

College education is the single most defining characteristic of public radio's audience. We often forget, ignore, or misinterpret this fact when we assess our public service to minority listeners.

Do minority listeners use public radio? Yes, they do. Like American citizens in the majority, those who have been to college are far more likely than others to listen to public radio's dominant program services.

Are minority listeners represented in the same proportions that they exist in the general population? No, they aren't. Radio doesn't work that way. Each radio station must serve a demographic segment of society – a niche – if it is to compete in the highly fragmented medium. So by definition, no station's audience can

or should "represent" the entire population.

Do we expect minority listeners to be under-represented? Yes we do. When gauged against the general population, minority listening to public radio reflects long-standing educational inequities that are still being overcome. But these disparities diminish significantly when minority listening is gauged against the college educated minority population.

Is this what we want? Well, it's what we set out to do 30 years ago – to provide a beacon of public service that places character over color.

The character of this beacon is **transcendent**. It transcends geography with a "sense of community" engendered across vast physical distance. It transcends age and sex. And by operating in the enlightened dimension of education's values and attitudes, it transcends color through its very indifference to it.

The Strategy to Target

Most public radio stations employ the strategy to transcend. But some of the more than 600 stations seek to serve minority listeners by opening additional doors to them.

Far from transcending racial and ethnic distinctions, these stations target them directly by defining their service, their niche, and their audience in terms of race, ethnicity, and/or languages other than English.

Do minority listeners use these stations? Yes, in great concentrations – albeit not always in great numbers.

Are minority listeners represented in the same proportions as in the general population? No, they're **over**-represented, for reasons already stated.

Do we expect minority listeners to be over-represented? We would certainly hope so; they are, after all, the types of people these stations strive to serve.

Is this what we want? Well, it's what we set out to do – to serve even more minority listeners with our programming.

– Frank Tavares
– David Giovannoni

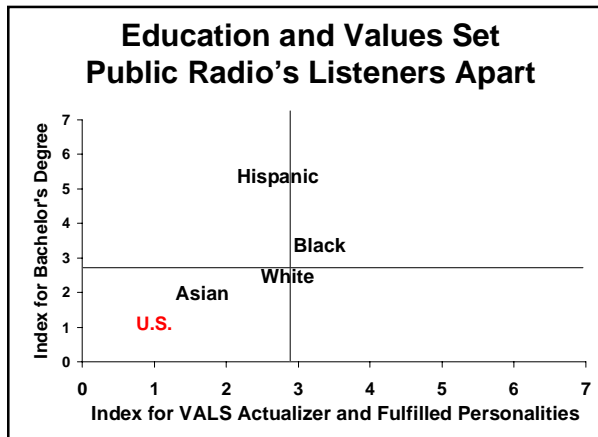
The more education one has, the more likely one is to listen to public radio.

But it's more than that. Public radio's listeners seek and reflect the values imbued in its programming. The best known system for identifying these values is VALS – specifically, the Actualizer and Fulfilled personalities.

The graph below indexes public radio listeners against the U.S. population (“U.S.”) to demonstrate that listeners of **all types** distinguish

themselves from their non-listening peers. The cross-hair shows the average for all public radio listeners. Segments of the audience are shown individually.

- Asian/Pacific Islanders who listen to public radio are nearly **twice** as likely to have college degrees than their non-listening peers. They are also twice as likely to have Actualizer or Fulfilled personalities.
- Public radio's Black/African American listeners are more than **three times** as likely as their non-listening peers to have Actualizer or Fulfilled personalities and to have earned a bachelor's degree.
- Hispanic/Latino listeners are nearly **five times** as likely to have college degrees than their non-listening peers.



The levels of education, and the concentrations of Actualizer and Fulfilled VALS types in public radio's audience, are incomparable to any other mass electronic broadcast channel in American society today. These attributes define public radio's position on the media landscape.

Public Radio's Minority Audiences

Transcendence Is An Unmet Need, Too

As a means of cultivating minority listening, public radio's strategy to transcend has gone virtually unnoticed within our industry.

In fact, public radio's college-educated minority audience is an untold success story to be celebrated.

The Unmet Needs Of Unserved Audiences

The desire to serve the "unmet needs" of "unserved audiences" resonates strongly in public radio's collective conscience and mission.

It is an explicit objective of many services now targeting listeners on the basis of their racial and ethnic characteristics.

But a survey of commercial radio begs the question, "What about the needs of the college-educated population – particularly those of the college-educated **minority** population?"

The radio needs of college-educated Americans would be virtually unfulfilled were not public radio currently meeting them through its strategy to transcend.

Like their white counterparts, whom they

strongly resemble in interests and values, educated minority listeners rarely find what they're listening for on the right side of the dial, or on the AM band.

They are naturally drawn to public radio in numbers that reflect their percentage of the American population. They are served by hallmark programming that assumes that one's character and beliefs are more relevant than his race or ethnic background.

In this way public radio is truly unique and **successful** in meeting the needs of college-educated minority citizens.

As we seek to address "unserved" audiences, we must recognize that **educated minority citizens are unserved too**, and that their radio needs differ from others in their racial cohorts.

Given the projected boom in the number of minority children going to college, public radio is poised to serve **this** minority community for decades to come.

Just by doing what it does best now.

– Leslie Peters
– David Giovannoni

Public Radio's Minority Audiences

A Glass Half Full and Rising

*When one door closes, another opens.
But we often look so regretfully upon the closed
door that we don't see the one which
has opened for us.*

– Alexander Graham Bell

Public radio reaches more Americans – white and non-white – than ever. And minority listeners are a larger portion of this audience than ever.

Our success is a direct result of our programming – programming that causes audience.

To appreciate how far we've come, we have only to revisit the years immediately following the Carnegie Commission Report and Public Broadcasting Act of 1967.

Few of us understood at the time what that report presaged. Indeed, many of us radio types working in those heady days had no concept of “public” radio.

Any questions we asked about the audience had anecdotal answers. We imagined hundreds – if not thousands – of disenfranchised radio users from dozens of different ethnic and racial groups flocking to our oasis for that 15-minute-a-week block program.

Then about 20 years ago, audience researchers like Larry Lichty, Tom Church, and David Giovannoni hinted that we might be overestimating the effectiveness of our reach.

We ignored them, of course, focusing intently on our own “research” – the letter and the phone call and the note under our windshield wiper.

It took time to realize how very blurry our picture of the audience was. And how unfocused we were in understanding how people use radio – especially those who happen to be Black/

African American, Hispanic/Latino, Asian/Pacific Islander, Native American/Indian, or some undefined mix.

Over time we learned to use the tools our research friends have crafted for us. We learned that listeners – minority and non-minority – will not tune to a radio station unless its programming as a whole appeals to them.

We also learned that not everyone will be attracted to the magnet of public radio programming. It's not that people are white or black or Hispanic or Asian or “other” – but that **public radio's service has an attitude that most Americans simply do not share.**

That's not good or bad.

It's just how radio works.

With these lessons, we have revisited our missions, reassessed our value, and learned to create programming that consistently serves an audience of our choosing. As a result, we have dramatically increased the numbers of listeners among **all** groups regardless of race or ethnic background.

With the bifocals of AUDIENCE 98 helping our aging hindsight, it's easier to see a glass half full. It's easier to appreciate how far we **have** traveled, whom we **do** reach, and the doors through which those listeners – both white and minority – enter public radio.

And we're only 20 years in.

During the next decades the numbers of public radio listeners who identify themselves as other than white will continue to grow. They'll surely grow because the demographics of the American public are moving in our direction. But they'll also grow because we'll continue to apply the

programming lessons and strategies we've learned...and will learn.

The charts, graphs, and paradigms of AUDIENCE 08 and AUDIENCE 18 will reflect that growth – and demonstrate our continued faith as broad-

casters pledged to serve the needs of **all** of our listeners.

A glass half full and rising.

– Frank Tavares

Public Radio's Generation X Audience

When we think of the people best served by public radio's programming, we think first of Baby Boomers – the most highly educated segment of American society today. We also think of older listeners served by public radio's mix of classical music, information, and entertainment.

We often forget that their 21-to-32 year old children and grandchildren are also listening.

There is no shortage of these Generation X listeners in public radio's audience today. Nearly three and one-half million of them listen to public radio each week.

But these are not your stereotypical Gen Xers. They distinguish themselves from their contemporaries in the same way that older listeners distinguish themselves from others in their age cohort.

Gen Xers who listen to public radio are better educated than their peers. They are more than twice as likely to have a college degree.

Most are Actualizers or Fulfilleds – VALS types associated with mature values. Public radio's Gen Xers are three times more likely to be Actualizers and five times more likely to be Fulfilleds than the general Gen X population.

Many have grown up with public radio, and all have grown into it.

In fact, **Gen X listeners have more in common with older public radio listeners than they have with their peers.** The reason, of course, is programming – the service we provide to listeners of all ages.

Two Programming Paths

Public radio's programming embodies certain social and cultural values that distinguish it from other stations on the dial. These characteristics distinguish its listeners from their cohorts who don't listen – whatever their age may be.

That said, **Gen Xers enter public radio through two distinct programming paths.** Each path attracts a different Gen X character.

The first path is paved with programming highly identified with public radio – primarily news and information, and to a lesser extent classical music and jazz.

The vast majority of Gen X listeners arrive via this path of hallmark programming on “mainstream” stations.

Both Gen Xers and older listeners spend half their time with public radio tuned in to music. However, while classical music dominates listening by older persons, other types of music are more attractive to Gen Xers.

In fact, music less commonly associated with public radio offers an alternative pathway for some Gen X listeners.

Stations with high concentrations of Gen Xers typically offer schedules devoid of news and loaded with “alternative” forms of music far from public radio's norm.

Gen Xers tuned into these stations are less likely to have college degrees. They're less apt to be Actualizers; Fulfilleds are nearly nonexistent.

What we see here is just another manifestation of the old maxim: **programming causes audience.** If we play for them and play well, they will come.

Yet the great majority of Gen Xers come to us via our hallmark programming. **Programming differences cause audience differences.**

It is unknown whether these two paths can ever find confluence. It **is** known, however, that doing so on “mainstream” public stations would

have a negative impact on the vast majority of current listeners and givers.

– Jay Youngclaus
– Leslie Peters
– David Giovannoni

Public Radio's Generation X Audience

Basic Principles

I shall never believe that God plays dice with the world. The Lord God is subtle, but malicious he is not.
– Albert Einstein

AUDIENCE 98's Gen X findings are like Einstein's powerful "mind experiments". **Every result follows from basic principles.**

Look at the main findings.

- Our programming currently serves significant numbers of Gen Xers. In fact, they're growing into our audience as fast as their Baby Boom parents did at their age.

We could have predicted that. Education is the primary determinant of public radio listening, and the Gen X cohort is becoming the best-educated in history. Why wouldn't the most basic law of public radio appeal apply to them?

- The Xers who tune to public radio are in tune with its social and cultural values – values that tend to blossom with high levels of formal education.

There's no surprise here. Every station, program, and personality attracts those most in tune with its social and cultural values. The values may be Cokie Roberts' or Don Imus' – each resonates with those who choose to listen.

- The Xers who tune to public radio are different than those who don't – just as Boomers who listen are different than those who don't.

While other stations target a certain age, sex, or race of listener, public radio operates in a different dimension: **education**. We distinguish ourselves from our peers; and so our listeners distinguish themselves from their peers.

- The Xers who enter the audience for music of their young lives are different from those who enter for public radio's hallmark programming.

The most basic of principles: programming causes audience, and different programming causes different audiences.

Today, public stations provide the programming of choice for educated Americans. We dominate this niche. So far we **own** it.

We can build on this strength in preparation for the day our position will be challenged.

Or we can program for Gen Xers.

We can't do both on the same stations without alienating the eight-in-nine listeners who aren't Gen Xers.

This too follows from basic principles. We don't need to conduct the actual experiment to verify the outcome.

Basic Principal

Replace "Gen X" with any other group of people. The results of the mind experiment are the same. When those in our industry proclaim we should serve more Gen Xers, minorities, or whomever, I say, "That's terrific. Go forth and multiply."

- Multiply the number of programs it will take to serve this audience 24 hours a day, 365 days each year.
- Multiply the number of stations it will take to devote one in each market to this audience.
- Multiply the dollars it will take to pay for this programmatic and systematic expansion.
- Multiply the effort, focus, and expertise it will take to own this niche. That's the only way this service will be viable in our highly competitive medium.

Amidst all of this multiplying, we can't forget to subtract resources from stations and programming that might better serve the current audience or strengthen our existing position.

So before we divert resources to focus on Gen Xers or minorities or whomever, let's acknowledge and accept that we already serve the **well-educated** component of each of these cohorts. Strengthening our current service will better serve more people of any well-educated stripe.

In fact, when we say we want a different audience, we're really saying we want an au-

dience that isn't so highly educated. We leave our area of expertise. We may even compromise deeply held ideals and highly esteemed standards.

No value judgment expressed or implied. Just a reminder of basic principles.

– David Giovannoni

Public Radio's Generation X Audience

How Generation X Uses Public Radio

Public radio's Gen Xers are slightly lighter radio users than older listeners, listening about two fewer hours per week. Because they use more stations, Gen X listeners are more radio active while being less radio dependent.

Gen Xers **rely less on public radio than do older listeners**. They tune in less frequently and are less loyal. They are also less likely to listen during both weekdays and weekends

	Occasions per Week	TSL (HR:MM/wk)	Loyalty	Listen Both Weekends and Weekdays
Generation X	5.6	6:18	29%	42%
All Listeners	7.0	8:31	36%	48%

AUDIENCE 98 offers evidence that these listeners are "growing into" public radio.

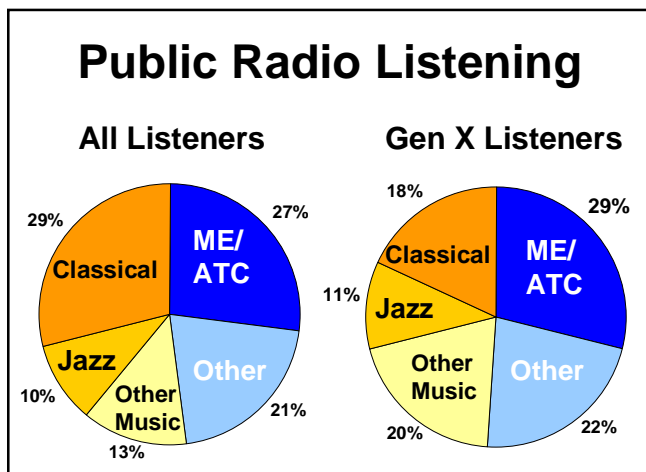
Three-in-four Gen X listeners say they are using public radio more in recent years.

Most public radio listening is to classical music, *Morning Edition*, *All Things Considered*, and jazz. This hallmark programming generates most of the listening by Gen Xers, with one notable exception:

Gen X listeners are not as attracted to classical music as older listeners.

Public radio's Gen Xers spend roughly the same amount of time as other listeners tuned to jazz. The largest block of their public radio music listening is to alternatives such as AAA, blues, rhythm & blues, and rock.

– Jay Youngclaus
– Leslie Peters



Public Radio's Generation X Audience

Cases From the X-Files

The niche market of radio is defined and differentiated by programming. You can't schedule something for everyone and serve anyone well.

Unfortunately, this cardinal truth can vanish mysteriously in public radio's debate about attracting listeners we perceive we don't have now, or don't have in sufficient numbers.

In our industry and elsewhere, Gen Xers have been generalized into one demographic lump. But they are no more all alike than they are space aliens.

AUDIENCE 98 returns to radio's fundamentals by demonstrating that Gen X listeners – like public radio's overall audience – **differ from each other, depending on the appeal of the programming to which they listen.**

X Marks The Spots

In evidence are the cases of stations with the most and the fewest Gen Xers in their weekly audiences.

In the first group are four stations with the **biggest Gen X cumes**, all with NPR-style news and information formats: WBEZ Chicago, WBUR Boston, WAMU Washington, and KQED San Francisco. These stations, with Gen X cumes of 75,000 or more, we dubbed **Big X** stations.

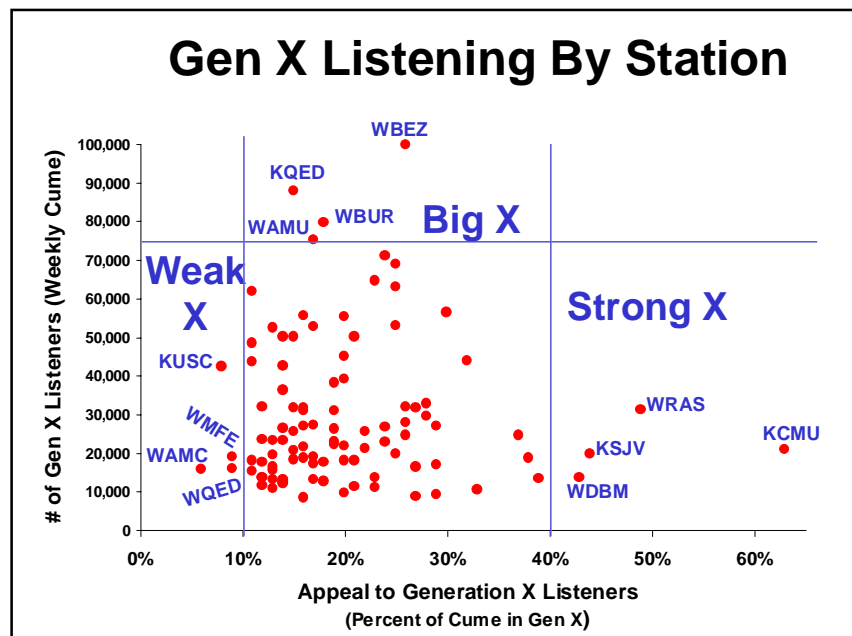
Four stations have **40% or more Gen Xers in their audiences**. As it happens, they are not among the system's largest cume stations: KCMU Seattle, WDBM East Lansing, WRAS Atlanta, and KSJV Fresno. With the exception of bilingual Latino KSJV, these high concentra-

tion Gen X stations broadcast alternatives to alternative rock. All **Strong X** stations carry ethnic music – from salsa to ska.

Four public FM stations have **fewer than 10% Gen Xers in their cumes**. (We ignored AM because that band is a barrier to attracting younger listeners.) That left WMFE Orlando, WQED Pittsburgh, KUSC Los Angeles, and WAMC Albany – the **Weak X** stations.

With one exception, **classical music prevails at the Weak X stations**. WQED and KUSC air mostly classical music, while WMFE's format is NPR news and classical. WAMC – with a pastiche of programming that includes NPR news, classical, other music, local talk, children's programming, and syndicated public affairs – has no dominant format, as well as no appreciable Gen X audience.

One hundred public stations with sizable Gen X Arbitron samples are arrayed above by the number of Gen Xers in their cumes and the concentration of Gen X listeners in their audience.



Big X, Strong X, Weak X

Of the three station groups we studied,

Gen X listeners to Big X stations are the most highly educated. Four-in-10 have advanced college degrees.

Six-in-10 are Actualizers. **Of our three Gen X groups, listeners to Big X stations are also the most likely to be in their public station's core audience.**

At classical-dominated Weak X stations, Gen Xers are mostly college graduates, though they are **less likely to have advanced degrees** than Big X listeners. A third are Actualizers. Another three-in-10 are Experiencers, characterized as young, variety-seeking experimenters who savor the new and abandon it just as quickly. Unsurprisingly then,

Gen X listeners to Weak X stations are the most radio-active and radio-reliant of the three Gen X groups. They use more stations, tune in on more occasions and listen for slightly shorter durations.

They are also the least likely of the Gen X groups to be in their public station's core.

The greatest contrast among Gen X listeners is found at Strong X stations.

Among our three groups, these are the youngest Gen Xers tuned to public radio, and the least educated.

Slightly less than half of the Gen X listeners to Strong X stations are not college graduates.

Slightly over half are Actualizers, with the rest scattered among various VALS 2 types. However, **nine-in-10 agree that the public radio station they listen to reflects their values** – whatever those values may be.

Education, the most powerful predictor of listening to public radio, is once again the prime connection between programming and audience.

Gen X listeners to Strong X stations don't look as much like public radio's overall audience because

the programming aired on Strong X stations doesn't have the same education-level appeal.

It also doesn't **sound** like the programming that most of 21 million public radio listeners tune to each week.

As these cases demonstrate, the number and concentration of Gen Xers tuned to any particular station depend on the programming aired. That's hardly paranormal: **Programming causes audience – whether that audience is Gen Xers, Baby Boomers, or any other group** broadly defined by a single characteristic like age. Each group slices into smaller segments according to programming appeal.

Those who suggest that public radio doesn't draw younger listeners with its current programming are wrong. Public radio, right now, counts millions of Xers **of the educated kind** in its weekly audience. The truth is out there.

– Special Agent Peters

Public Radio's Generation X Audience

I Am Not A Slacker

There are a lot of people interested in my age group, the so-called Generation X. It seems like everyone, from product marketers to demographers to program directors wants to pigeon-hole who we are.

We're supposedly cynical, unresponsive, politically apathetic, vidiots. They say we're leeches who live with and off of our parents; are bored by anything not about us; have an attention span of 30 seconds; and are MTV and Howard Stern junkies. The list goes on and none of it is positive.

This is not me. These are not public radio's Gen X listeners. We are not slackers!

AUDIENCE 98 shows us that **public radio's Gen Xers aren't all that different from our parents or any other generation of listeners.** We too are well-educated and share the same social and cultural values – the two characteristics that predict anyone's attraction to public radio. Okay, so we don't make as much money as Baby Boomers but give us time and we'll get there.

AUDIENCE 98 also tells us that **three-in-four Gen X listeners say they're listening to public radio more in the last few years.** That's what I find among my own friends. Not only are they listening more, they're also referencing public radio in conversations. It's an important information source in their lives.

As supported by AUDIENCE 98's data, the majority of us know that the news on public

radio is unique and we won't find its equal on commercial stations.

Some people in our industry assume that doing more stories about Generation X, or playing the Smashing Pumpkins, will result in an influx of younger listeners.

That's not only flawed thinking, it's pretty insulting too.

I'm just as interested in the General Motors labor struggle and what's happening in Kosovo as your other listeners. I even enjoy the news from Lake Wobegon. And I like my *Morning Edition*, *Marketplace* and *Car Talk* just fine the way they are.

The best way to serve Gen X listeners, as with all listeners, is to give us the best programming possible. Programs created "just for us" effectively tell us that we aren't ready for grown-up radio. And they also tell your other listeners to go away.

Public radio, we love you – so I hope you don't mind a little advice from one satisfied Gen X listener:

- You've already got us – not all of us, but those of us who share the education and values of your older listeners.
- Remember that we tune in now for a service we can't find anywhere else.

Stick with what you're doing and make it even better, and we Gen Xers will stick with you.

– Ingrid Lakey

Public Radio's Generation X Audience

I Want My NPR

Editor's note: *We asked this report's Gen Xers – Core Team member Jay Youngclaus and Associate Ingrid Lakey – to tell their stories of how they came to public radio. Coincidentally, a large part of the credit goes to Terry Gross.*

Ingrid Lakey, 27

I can't remember a time when public radio wasn't a part of my life. I was born the same week that *All Things Considered* went on the air. The fact that I know this just about says it all.

I grew up in Philadelphia where my father listened to WHYI constantly. It was part of the daily ritual of life. I remember the first time that I understood what this thing called public radio meant to him and would come to mean to me.

We were at the beach; I was 12. My dad was very excited about a program called *Fresh Air* and an interview by Terry Gross with a waitress about what it was like to be a waitress. I didn't understand what was so special about this, and told my dad so. He explained that *Fresh Air* recognized that every job is important and every worker has a story to tell. For him, public

radio was activism. Now it is for me too.

Jay Youngclaus, 29

I credit Terry Gross and *Fresh Air* with making the traditionally unbearable teenage years a little more enjoyable. For several summers during college, my mother and I commuted together to Boston, sharing the confined car space for over an hour each way. It's not what most young men relish.

What format let us to pass the time in peace? Not classic rock or Music of Your Life – but public radio, the perfect medium.

Fresh Air was always part of the afternoon ride. Having Terry Gross and her interesting parade of guests in the car was like having a group of really entertaining friends accompany us home.

While we didn't talk much during those long, hot car rides through rush hour traffic, my mother and I shared a great deal. Without saying a word she imparted her delight in "meeting" articulate people with unique backgrounds and experiences – and the joy of a lifetime relationship with public radio.

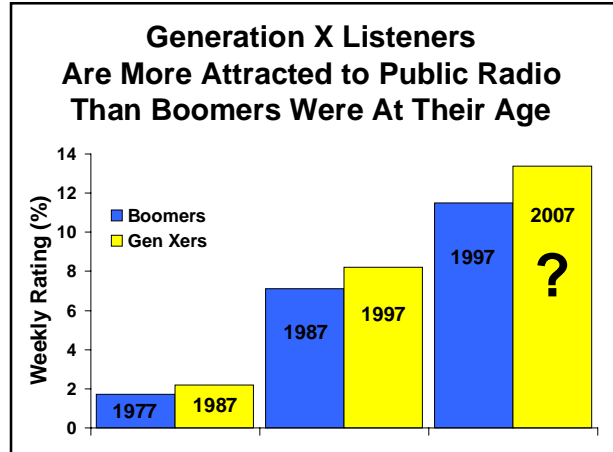
Public Radio's Generation X Audience

Wait 'Til You're Old Enough

Just like certain Boomers before them, certain Gen X listeners "grow into" public radio as they are educated and mature.

In fact, public radio serves Gen X listeners a little better than it served Boomers at the same age. Today more than eight percent of all Gen Xers tune to public radio each week. If the trend continues, public radio's reach into the Gen X population will exceed 10 percent at the turn of the century and approach 14 percent in 10 years

– David Giovannoni



Source: Arbitron Nationwide 1977, 1987, 1997; NPR stations

Public Radio's Older Audience

Many in our industry are quick to take for granted our older listeners. Programming that serves them is dismissed as a dead end, with a presumed life expectancy as limited as its listeners.

Concern is often focused on younger listeners, as though the older audience had already outlived its usefulness.

The fact is, not only is public radio important in the lives of many older listeners, **these listeners are important to the life of public radio.**

They Are Prevalent

When we open our collective mike,

nearly half of our adult listeners were born before or during Franklin Roosevelt's presidency.

These are the "Swing" and "World War II" generations – the parents and grandparents of the Baby Boomers. Nearly one-quarter were born between 1933 and 1945, and one-fifth before 1933.

Together these groups comprise 39 percent of public radio's national adult cume and 44 percent of its AQH audience.

Classical music programmers know them well: **They are the substantial majority of the classical music audience.** One-in-four listeners to a classical piece is between 53 and 65; and one-in-three is 65 or older.

They Are Different

Older listeners distinguish themselves from their contemporaries in the same way younger listeners distinguish themselves from theirs:

They are much better educated.

The education gap between older listeners and their peers is even greater than for younger listeners and their age cohorts.

Fifteen percent of all Americans in the WWII generation have earned at least a bachelor's degree. Compare that to 50 percent of public radio's WWII audience, and 62 percent of its Swing audience.

More pointedly than younger listeners, **older listeners demonstrate the common denominator of public radio's appeal – higher education.**

They Are Loyal

Older listeners rely more on public radio than any other cohort of listeners. They are more loyal, listen longer, and most likely to listen on both weekdays and weekends.

The fact is, older listeners rely heavily on our service. And because they do, **they're as likely to give as Baby Boomers, and more apt to contribute than Generation X listeners.**

Here Today, Here Tomorrow

Older listeners' loyalty and support are assets that aren't about to die away. Actuarial tables tell us that serving this audience will pay off for many years to come.

Half of today's 65 year-olds will live to be older than 82. Half of today's 75 year-olds will live to be older than 86. Given their resources our well-educated listeners are likely to live even longer.

Thought of another way,

In 2015 half of today's listeners over 65 years-old will still be of this world.

It's a little too early to worry about format obso-

lescence through audience attrition. And it's certainly premature to jettison classical music because younger listeners are currently less interested in it – especially since they seem to grow into it with age.

More important, though, is recognizing the primacy of public radio's older listeners. There's

more listening, more loyalty, and more life in this audience than many would assume.

Our older listeners plan to be with us for some time. We can plan on that, too.

– David Giovannoni
– Jay Youngclaus
– Leslie Peters

Public Radio's Older Audience

Willing and Able To Give

Public radio's older generation is not only loyal in listening, it's also dependable in giving. **Age is no barrier to climbing the Stairway to Given.**

In ascending each of the five steps, older listeners keep pace with Baby Boomers, and sometimes leave Generation Xers behind.

Swing generation listeners are at the peak of their earning power, and their gifts equal those of Boomers. WWII listeners, now mostly retired, have lower incomes – closer to those of Gen Xers. Still, they are more apt to give than the youngest listeners, whom they lead substantially in reliance on public radio, and personal importance of the service in their lives.

As a group, WWII listeners give smaller gifts – not a factor of their age but of their ability to afford.

Or it is?

AUDIENCE 98 doesn't measure the net worth or personal financial value of the audience. But other sources tell us that older Americans, especially the best educated, own a large portion of all financial assets – the result of a lifetime of work, earning, and saving that younger groups simply haven't had.

Eventual access to this accumulated wealth is what public radio's nascent planned giving activities strive to gain.

But these efforts can only succeed if our programming continues to serve their interests well.

– Leslie Peters
– David Giovannoni
– Jay Youngclaus

Public Radio's Older Audience

The Old Folks At Home

Help! I've fallen and I can't turn off the opera.

– Public Radio Programmer Humor

I've heard every tasteless senior citizen joke on the planet. I'm even responsible for a few.

But programming to older listeners is serious business. I did it for ten years at WMFE in Orlando. We did fine, with audience and fundraising numbers many in similar-sized markets would envy. But one concern always dogged our success:

Sure, the audience is okay now, but what happens in 10 years when they're dead?

AUDIENCE 98 reminds us how important public radio is to older listeners, how important older listeners are to public radio, and just how much life they have left.

I certainly wouldn't write them off yet.

The parallels between this and the Gen X report are striking – especially the notion that we

can hurt ourselves by the incautious seeking of younger or older listeners.

Older persons who share public radio's values are already attracted to our programming – and it didn't require tributes to Frank Sinatra, nursing home remotes, or canes and walkers as pledge premiums.

The best way to serve listeners **of any age** is to provide the best program service possible. That's because the appeal of public radio programming stems from factors beyond age. Education and values are much stronger predictors of listening. Intellectual curiosity knows no age boundaries.

I'll be a geezer (52) in just seven years! I still plan to be listening then.

That is, if I can still twiddle the Philco at that terribly advanced age.

– Peter Dominowski

Getting to More with the Concept of Core

If you could pick only **one measure** of success - one measure, under your control, that reports your station's public service **and** financial stability - it's the number of core listeners in your audience.

That's why the Public Radio Program Directors Association (PRPD) initiated The Core Project. The project challenges stations to grow their core cume by four percent each year, through the year 2000, by focusing on the appeal of their programming.

What do these savvy programmers know about the value of core cume? AUDIENCE 98 can explain.

Why We Care About Core

Listeners become part of your core audience when they make you their favorite spot on the dial – that is, they spend more time with you than with any other station.

Like any other relationship, spending time together can strengthen ties. Over time, your core listeners become your station's best friends – more apt to stick by you and support you.

The concept of core is closely intertwined with loyalty, the measurement which tells you when and how much listeners in your cume are listening to you.

The size of your core depends on how well your programming appeals to your cume listeners in the hours they use radio.

If you consistently inform and entertain in a way that reflects their beliefs and values, they'll turn to you first whenever they flip on the switch.

What We Know About Core

One way they set themselves apart is the number of days they listen to public radio.

Core listeners use public radio five days a week on average, twice as many days as fringe listeners.

Another prime distinction between core and fringe is the number of tune-in occasions.

On average, core listeners tune in three times more often to public radio each week than the fringe.

The duration of occasion for each group is about the same.

A third, significant way the core defines itself is by listening both weekdays and weekends.

Two-thirds of the core use public radio during both parts of the week. Almost half of all people in the fringe listen to public radio only on weekdays, though they are tuning in to other stations on weekends.

That information supports our industry's focus on improving weekend programming. Getting listeners to tune in again on Saturdays and Sundays is a strategy to strengthen and increase the core.

What else do we know about these listeners?

Almost half of the core are Actualizers, the high income, principle-centered, community activist VALS2 type that makes up about a third of public radio's overall audience.

Perhaps for this reason core listeners are a bit more apt to be imbued with "a sense of community" regarding public radio - that is, slightly more likely than the fringe to consider public radio personally important, unique in its news and music programming, and in harmony with their own social and cultural values.

Significantly more than fringe, core listeners are likely to seek out public radio when they travel or move – signifying it as an important element in their lives.

The personal importance they place on their public radio station, combined with their reliance on its service and their ability to give, make core listeners prime supporters.

Just under half of core listeners are current givers to a public radio station.

But since just over half are **not** giving, core's pledge potential is far from exhausted.

What We Can Do About More Core

Despite their differences, core and fringe still look a lot alike – and that's a big advantage when considering how to convert fringe to core. Useful, too, is the fact that **fringe listeners are heavier users of radio, spending about a third more time listening each week than core listeners.**

If you can serve them better, the fringe may spend more of that time tuned into your public station. They may even make you their favorite. Because you choose the programming on your station, turning fringe into core is something you can strongly influence.

Remember that most fringe listeners tune in to public radio to hear the programming that's most popular with the core – like the NPR newsmagazines, *A Prairie Home Companion*, *Car Talk* and *Marketplace*. That's unsurprising because, as noted, core and fringe have a lot in common.

When you “superserve” your core listeners with

more programming that's highly focused on their beliefs, interests and lifestyles, you create a more powerful schedule that attracts fringe listeners more often. It may also increase TSL and personal importance among the non-giving core - enough to make them supporters.

But don't rely too much on national producers to create those programming magnets. **Half of all listening to public radio is to local programming.**

Eight-in-10 core listeners consider local programming personally important, as do seven out of ten fringe listeners.

Your success at creating more core listeners may be determined by a mix of canny national program choices and skillful leadership of your local announcers and producers.

In many ways core is a proxy measurement for public service. Your ability to serve your station's best friends and most loyalty listeners is reflected in the concept of core.

The more listeners in your core audience, the more effective your public service. The more valued your public service, the more likely your station will attract the financial support that will make you - and public radio - a strong force among media, now and in the future.

– Israel Smith

The Rotten Core

We know that core listeners are much more likely to financially support public radio than are fringe listeners.

And as the Stairway to Given shows, we know why:

- they rely on their public station;
- it is personally important in their lives;
- and they believe that contributing listeners support it.

However, not all core listeners are givers. What's with this "Rotten Core"?

Although a public station is the favorite of all core listeners, those in the Rotten Core do not rely on it as heavily as do those in the Giving Core.

Comparing these core listeners on their steps up the Stairway to Given proves this.

- The Rotten Core tunes in less frequently, listens four and one-half hours less each week, and is significantly less loyal than the Giving Core.
- While both are likely to say that public radio is important in their lives, those in the Rotten Core are much less likely to have a "strong" Sense of Community with public radio.
- The Rotten Core is also less likely to possess the proper combined funding beliefs that are associated with giving to public radio.

Stairway to Given (For most-listened-to Public Radio Station)		Giving Core	Rotten Core	Fringe
	Percent of Listeners	23	25	52
	Percent of Listening	43	36	21
	Percent of Givers	68	0	32
	Percent of Giving	74	0	26
Steps 1&2 Reliance on Public Radio	Percent in Core	100	100	0
	Loyalty	77	69	14
	Years Listening to Station	12	9	9
	Percent with “Strong” Reliance on Public Radio	97	89	7
	Percent who listen both Weekdays and Weekends	80	65	30
	Occasions (per week)	14	10	4
	TSL (HR:MN per week)	17:25	12:56	3:34
	Step 3 Personal Importance	Percent who agree Public Radio Station is Personally Important	98	93
Percent with “Strong” Sense of Community		80	59	43
Step 4 Funding Beliefs	Percent who have Beliefs Associated with Giving to Public Radio	41	34	34
Step 5 Ability to Afford	Average Annual Household Income	\$80,000	\$58,000	\$62,000

The lesson here is clear:

Being a person’s favorite radio station is a wonderful gauge of service and a key indicator of one’s propensity to support public radio. **But it is not sufficient to create a giver.**

The importance of the station’s programming in listeners’ lives, and their beliefs about how

the station is financed, remain key steps that must be taken up the stairway to giving.

– David Giovannoni
– Carla Henry
– Jay Youngclaus

Note: *The Stairway to Given is explained in detail on pages 115-116.*

Getting to More with the Concept of Core

A Matter of Choice

One of the most commonly asked questions among programmers is,

How do we turn fringe listeners into core listeners?

The answer is simple:

Become the station they choose most often when they turn on their radios.

The tune-in, or “occasion,” is the basis of all radio listening, and it results from the choices you and your listeners make. The tune-in is the point at which public service begins. It happens when your programming is more compelling than any other station’s. And it happens at the listener’s convenience.

What do tune-ins have to do with core and fringe? Listeners don’t just happen; individuals choose to listen, or not. When they choose your station at least once in a week, they enter your fringe. They enter your core when they choose your station’s programming more than any other’s.

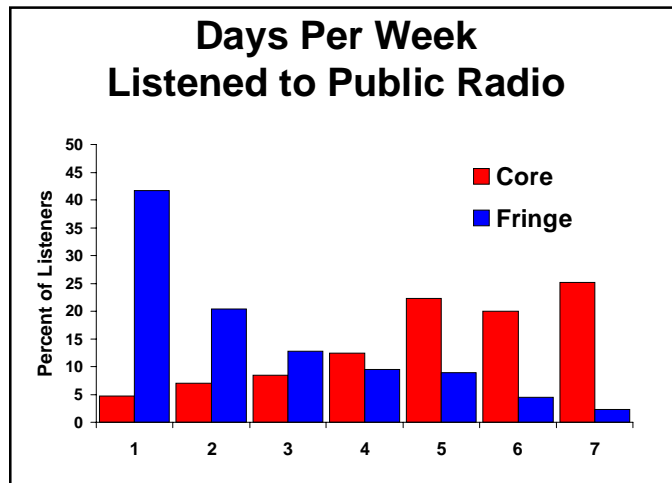
Their choice is made when they turn on their radios. And what they hear is your choice

The below graph shows the extreme behavioral difference between public radio’s core and fringe listeners. Half of all core listeners tune in to pub-

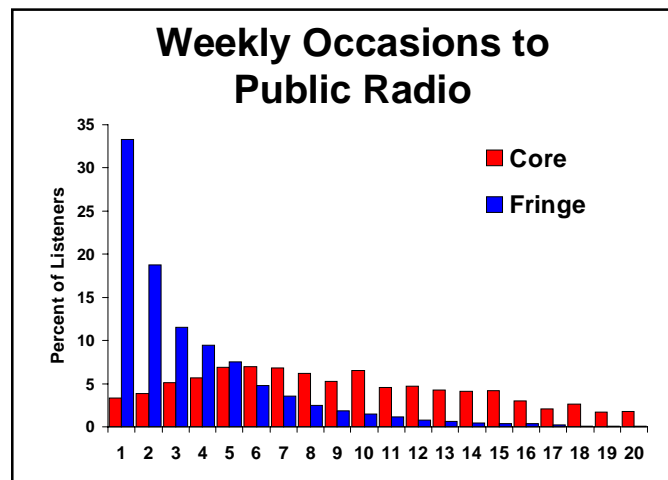
lic radio ten or more times each week. But half of all fringe listeners tune in only once or twice per week.

Occasions turn fringe listeners into core listeners.

It’s the listener’s choice. And your programming decisions directly affect this choice. For instance, you can choose to serve the same listener across the week, or you can choose to serve some listeners only on the weekend.



The above graph suggests the ability of these two programming options to move people into your core and fringe.



Two-thirds (67%) of all core listeners tune into their public radio station five or more days each week. Compare that to the two-thirds of fringe listeners (62%) who listen only one or two days per week.

In sum, **choice is what this core and fringe thing is all about.** You choose the programming; people choose the station. The more appropriate and compelling your choices, the more frequently they listen.

And that’s how to turn fringe into core.

– David Giovannoni