



4.

The More Things Change...

It's been 10 years since public radio's last comprehensive national audience study. In media-years that's a lifetime; maybe two or three.

Since AUDIENCE 88, information and entertainment options have multiplied exponentially. Cable television puts 60 video channels within remote reach of the average American. Eight-in-10 own a VCR.

No development has been more astonishing than the Internet. Ten years ago it was an obscure conduit for academic research. Today its growth is phenomenal. In fact, since AUDIENCE 98's data were collected, Internet penetration has doubled. It is such a part of life that it's changing fundamental social concepts.

But the Internet is just the latest in a continuum of communications technologies that annihilate distance and physical boundaries.

Public radio, through its network news programming, has long been the focus of a "virtually community" and has helped redefine "local" among its audience of self-perceived "global citizens." And radio still dwarfs the Internet in audience reach. While half of all households has a computer, the average American home has **seven** radios.

The following three AUDIENCE 98 reports consider some effects of changing media on public radio and its listeners.

A Question of Place

The Carnegie Commission's poetry that defined public radio 30 years ago waxes eloquent about the "bedrock of localism." Yet while all public radio stations are local, all public radio programming is not.

Two questions keep emerging as managers wrestle with local programming investments.

Do listeners appreciate the geographic localness of programming as much as many of us do?

Do listeners consider it important that their public radio stations reflect their geographic communities?

While the answer may vary from station to station, AUDIENCE 98 finds several clues strongly suggesting that

geographic localism is a more compelling concept among many public broadcasters than it is among most listeners.

No single statistic tells us this conclusively. But we do see a number of consistent indicators.

Listening

In terms of sheer hours on the air, local programming dominates the schedules of most public stations across America.

But there's as much listening to network programming as there is to local – principally to NPR news magazines and a short list of major, nationally distributed shows.

Most listening to network programming happens when the available radio audience is at its peak. But placement alone does not account for its over-contribution to listening.

The audience's loyalty to network programming is 32%. Compare this to its loyalty of 26% to local programming.

Public radio's network programming clearly exerts a stronger pull. On the measure of

loyalty it serves our own audience better than our local programming does.

We might guess that this is, at least in part, a function of the higher quality of major network programming. But we don't know for sure.

Personal Importance

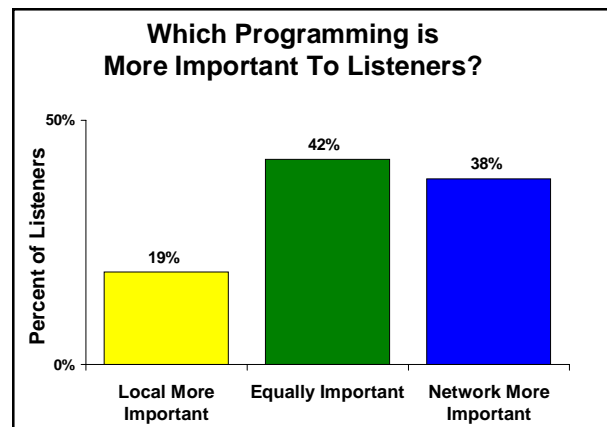
Listeners are more likely to consider network programming more important in their lives than local programming.

For every five public radio listeners,

two consider network programming more personally important than local programming;

one considers local programming more important;

and two rate network and local programming the same.



Individuals' assessments of programming's personal importance are strongly influenced by their listening. For instance, those who don't listen to local programming are unlikely to consider it important in their lives. Similarly, those who listen heavily are much more likely to consider it important.

However, something more than sheer **use** is

involved in a listener's assessment of personal importance.

That something is "uniqueness."

Programming Uniqueness

Listeners who consider network programming more personally important than local programming believe strongly that "public radio's news is unique, not available on commercial stations."

But those who say local programming is more important than network programming are **not** more likely to say "the music on public radio is unique...."

Are listeners telling us that **network news** is unique and **local music** is not? Because the questions were not posed this way, this conclusion is speculative. But it's quite logical, as most listening to network programming is to news, and most listening to local programming is to music.

We do know for sure that

the personal importance listeners attribute to network programming includes a component of "uniqueness," while their assessment of local programming does not.

"Local" Versus "Community"

The definition of what is "local" has changed significantly in 30 years. New communication technologies have created the "global village," bringing the world's news and culture into our homes as a daily reality.

Most of public radio's educated listeners have adapted easily to these changes. They have become, as Bill Siemering once imagined, "citizens of the world."

For them, "community" has transcended geographic boundaries to mean an association of **shared beliefs and interests**.

Listeners with a "sense of community" – a concept introduced in the "Givers" report – feel a strong resonance with public radio's social and cultural values and seek it out when traveling

or moving residence. They are also more likely to be givers.

Given their world view it should come as no surprise that

listeners who say network programming is more important share a stronger "sense of community" than do listeners who prefer local programming.

In other words,

a person's use of local programming does **not** contribute to this sense of community; his or her use of national programming **does**.

Unfortunately, because of how the questions were asked, we do not know from this study whether it is the "news" or the "national" component of network programming that contributes most to this sense of community.

More Questions Ahead

So – do listeners appreciate the geographic localness of programming as much as many of us do? And do they consider it important that their public radio station reflects its geographic community?

Not only is network programming generally a stronger audience draw, it is more important in the lives of many more listeners.

The personal importance people place on network programming transcends their listening. They find it unique, and through it share a virtual community defined by values, beliefs, and interests.

Given the information at its disposal, AUDIENCE 98 can find no evidence that listeners feel this way about programming produced locally.

These findings are clear, but far from the last word. They offer strong guidance for further research and additional thinking.

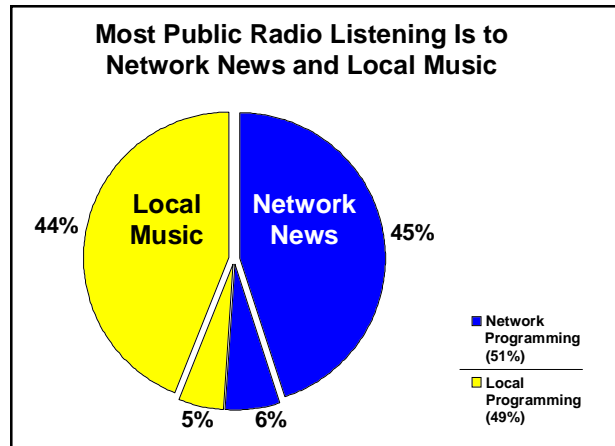
– David Giovannoni
– Jay Youngclaus
– Leslie Peters

A Question of Place

What Do Listeners Think When They Think of “Local” and “National” Programming?

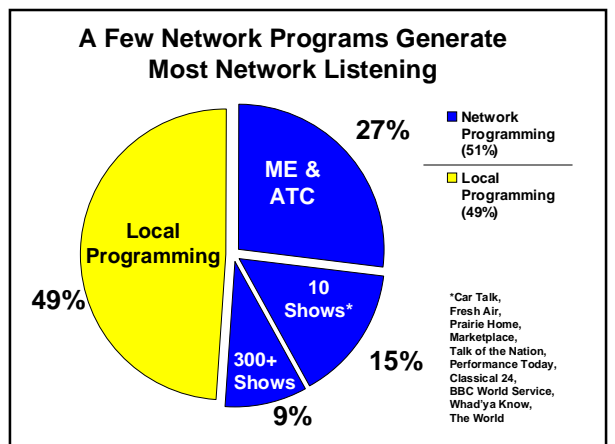
To consider a type of programming important a person must listen to it.

Based on listening, “network” almost inevitably equals “news” while “local” is nearly always associated with “music.”



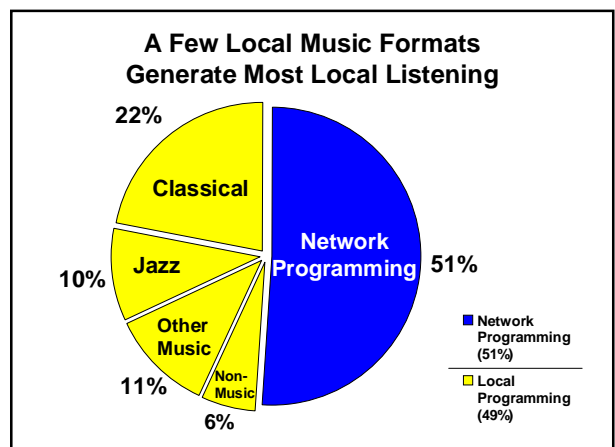
The overriding prevalence and power of *Morning Edition* and *All Things Considered* is shown below.

For many listeners these two programs define not only the network experience, but the public radio experience as well.



Music, primarily classical and jazz, generates most listening to locally-produced programming. Music, not local news, defines the “local” public radio experience for most listeners.

- Jay Youngclaus
- Leslie Peters
- David Giovannoni



A Question of Place

A Place In Question

At 7:32, on an ordinary Thursday morning, tragedy forever transformed the wooded, hillside community of Springfield, Oregon. The shooting deaths of two students and the injuries to another 22 at Thurston High shocked, stunned and eventually renewed a town KLCC calls its local community. The stories that were told would resonate across America and the world. That day the place in question was ours.

The events unfolding then and through the following week amplified the changing role of local service in public radio. While the national press was flying in, our KLCC volunteer reporter was already on the scene. We pre-empted our music programming for a live call-in within four hours of the shooting, to help begin the public process of examination and grief.

To us, this was not just another national tragedy. This is our home, and the people involved are our friends and neighbors.

We like to think we did our best to serve the very pressing and real needs of our audience – that, on this day in May, our local programming was personally important in the lives of our listeners.

Unfortunately, AUDIENCE 98 tells us that, on any other day, our listeners are more likely to find our national programs more important. They engender more loyalty and a stronger “sense of community” than our local programming.

Why don’t our listeners share the value of localism that many of us bring to our jobs? First is a difference in mindset. But second is a failure of priority.

The definition of “local” has changed over the years, both for our listeners and for public radio stations. Listeners are now defining themselves by their shared interests, as signal expansion is extending our services beyond city, county and state lines. Our experience of the world has grown larger, while the corner store, neighbor-

hood tavern and ward politician have diminished in importance.

Under the wider umbrella of our signals listeners who prefer network programming (chiefly news) have found social and cultural values that match their own. The same cannot be said for those who prefer our local programming. AUDIENCE 98 tells us that listeners who do find local programming more important listen mostly to music – and say that music on public radio is not particularly unique.

AUDIENCE 98 did not ask any specific questions about local news, so we still need to ask: What value does local news have in our listeners lives?

That brings us to priorities – the second reason localism may not be as important to our audience as it is to us.

Over almost 30 years the national networks have succeeded in bringing an audience to our radio stations. With resources and efficiencies unmatched by any station they deliver a quality, consistent product that is preferred by our listeners. No wonder that our listeners have formed a community of shared values, beliefs and interests around these programs.

We have failed, for the most part, to develop an equal local franchise to serve that community of interests.

AUDIENCE 98 suggests to me, as a journalist, that I must acknowledge that my news operation may not be up to the network mode. Other program directors can make their own assessment of their own shops.

AUDIENCE 98 also suggests strongly that if our listeners are to find our local service important, we must refine our mission and editorial content to serve their needs and interests at the station level. And spinning discs with personality may not be enough to accomplish that.

If public radio stations are to survive in a future of increasing globalism, digital transmission and converging technologies, we must be willing to invest in local talent to improve the quality and meaning of that which only we can provide – truly local content.

KLCC once considered itself a community radio station because it tried to serve many communities with a checkerboard of programming. AUDIENCE 98 tells we already serve a community of interests in public radio – one audience with many different needs.

When this community searched for the information and support it needed at the time of the Springfield tragedy, I hope they found in KLCC a personally important source. But I also know they relied heavily on NPR, television, cable news, and two local newspapers. If I want my listeners to consider our programming valuable,

my service must always match the quality of theirs.

When your local community needs you will you be prepared to serve it well?

Do you have the staff and programming in place to respond to an incident of high, local impact?

Do we really know what our audience might want if we asked them about local service?

AUDIENCE 98 is not the Holy Grail. It can't tell us whether to add the new network show, or which local program to develop. But it should serve to remind us that **what a program does is more important than where it comes from.** It can grow a community.

– Don Hein
Program Director, KLCC

It Ain't Net-cessarily So

The amazing growth of the Internet has provoked two primary responses in our industry. Will it compete with public radio? And how can we use it to our advantage?

AUDIENCE 98 offers an unequivocal answer:

The Internet has no impact on public radio listening.

Listeners who travel in cyberspace take public radio with them. AUDIENCE 98 finds no evidence that the Internet is supplanting their use of public radio's news, music, and entertainment programming.

True, public radio listeners are twice as likely as the general public to use the Internet or subscribe to an on-line service. More say they'll do so in the future.

Yet even for public radio's audience,

the Internet is not a universal medium.

In fact, half of public radio's weekly audience does not use the Internet or on-line services at all.

– Michael Arnold
Program Director, WUNC

It Ain't Net-cessarily So

Which Listeners Are Wired?

"The things that you're li'ble to read in the bible."
 – Ira Gershwin

Age and sex are the primary determinants of Internet and on-line use among public radio listeners.

Web surfers tend to be young. Listeners in their 20s and early 30s are the most likely to spend time in cyberspace. Nearly two-thirds are wired.

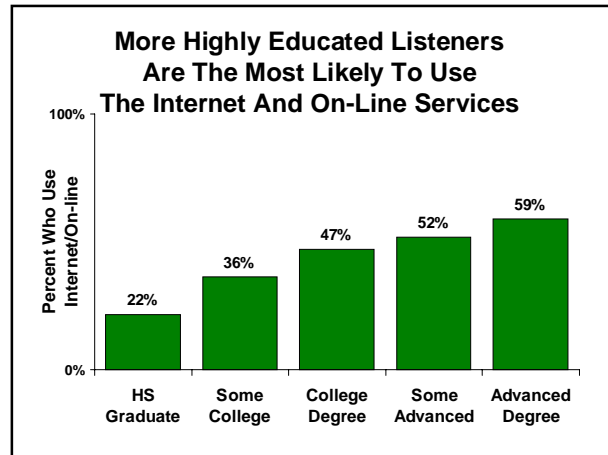
These young, ultra-wired listeners constitute a small portion of most public radio stations' audiences.

Looking for Luddites? Try your older listeners. Listeners born before 1946 steer clear of the information superhighway – especially if they are retired.

These older, non-wired listeners constitute a significant portion of public radio's classical music audience.

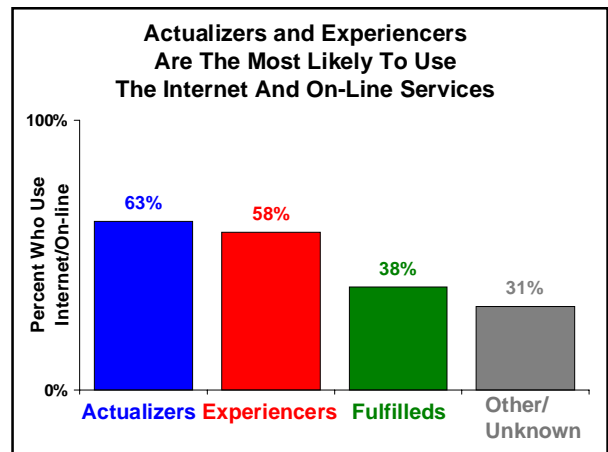
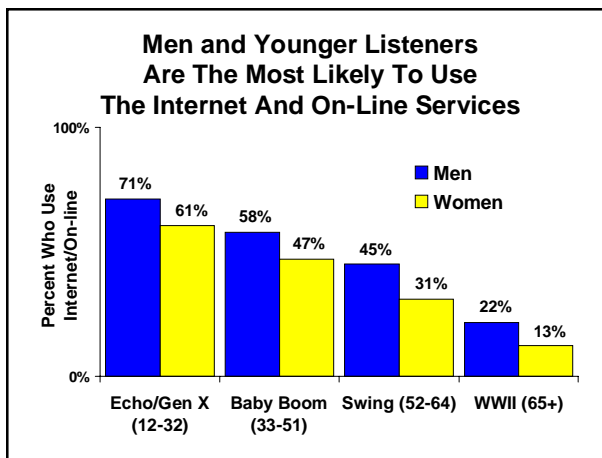
Internet is a guy thing. No matter their age, women are less likely than men to spend time in cyberspace. **Sixty percent of your female listeners don't use Internet or on-line services at all.** In contrast, listening to public radio is split fairly evenly between women and men.

You don't have to be a rocket scientist to use the Internet, but a graduate degree helps. **More than two-thirds of your listeners who use the Internet have a master's degree or more.** Public radio has, on average, a better educated audience than most media. In years of formal schooling, web surfers rank near the top.



Actualizers, the VALS type that constitutes more than a third of all public radio listeners, like Internet the most.

Two-thirds of these well-heeled, take charge, information seekers are on line – compared to one-third of the Fulfilleds, public radio's other dominant VALS group.



Actualizers and Experiencers are the most likely to be surfin' and listenin'. Keep in mind, though, that only five percent of public radio's listeners

are Experiencers, compared to the 35 percent who are Actualizers.

– Michael Arnold

Minding the Old While Mining the New

Human attention has become the most valuable commodity on the planet earth.

—Michael Flaster

The Internet has been likened to the Wild West. Without law or precedent, its settlers are staking their claims while the land is still up for grabs.

It's a weak analogy; the limiting factor is bandwidth, not territory. But it's apt in one sense: any prospector has got to leave the old homestead before he can settle a new one. And therein lies the potential problem.

What Does The 'Net Offer Public Radio?

Public radio's business is public service, and the Internet seems too big an opportunity to ignore. It makes sense to explore how this new medium might enhance your station's or your program's service to the public.

The key questions are:

Can we extend our service to new audiences via the Internet?

Can we augment our services to existing audiences via the Internet?

And if so, at what price and with what effect?

Extending Service

Barriers to entering the new medium are insignificant given its **potential** reach. But as cable television demonstrates, reach does not translate into viewing. Cable offers dozens of channels; the Web allows access to **millions** of pages from all over the world. Competition is fiercer than on any electronic medium.

Even if the Web could deliver your services to new listeners, what is the true cost? What is the true return? And how do its costs and benefits compare to those of your current distribution

medium? In our rush to the 'Net most public broadcasters have yet to answer these questions.

Augmenting Service

AUDIENCE 98 can't tell you **if** or **how** you can win new listeners through the Internet. But it **can** help you decide whether web services for current listeners are worth it.

The Internet is like any other medium. It appeals to certain types of people and not to others. Be sure you understand who's using it. The attached worksheet will help you estimate the number of web-enabled people in **your** audience. The Internet's efficiency at augmenting your on-air service will vary given the age and sex of your listeners.

Internet Economics

How do the economics of supplementing your service via the Internet compare with the economics of running your station or producing your program?

AUDIENCE 98 doesn't have the full answer.

But you do.

The comparisons are easy. Begin with what you know.

Unlike the Internet, radio has a virtually **universal reach**. Radio is quite **effective**: a typical public station serves its core listeners 12-15 hours per week; even its fringe listeners hear three to four hours per week. And radio is extraordinarily **efficient**: the average cost of serving one listener with an hour of programming is only a few pennies.

Ask your webmaster to generate these numbers for your site: How many people are actually using it (cume)? How many are tuned in at any one time (AQH)? What is their average time spent with each page (TSL)? What is the gross

level of consumption in terms of total time spent with the site per week (listener-hours)?

Take these measures and divide them into the full cost of building and maintaining your site.

How efficient is the Internet in serving your listeners?

What would your on-line numbers have to be to match the cost-effectiveness of your station?

Streaming audio? Cool. How many people around the world can you feed it to at one time? What fraction of your station's AQH audience is that?

Taking pledges via your web site? Terrific! Now, divide the cost of that portion of the site into the number of web-based pledges. What's it costing you to bag an electronic buck?

When you have the answers to these questions, you have the information to assess if the Internet is a viable means of improving your public service.

The Future Outlook

No doubt about it: The Internet is booming, and it has the potential to enhance your public service in creative and interesting ways. With half of your listeners wired, you've got the access problem half-solved.

We now know that time spent in cyberspace is not time taken from public radio. That too is good news.

But while the Internet is definitely cool, it doesn't deliver anything like our own medium.

Remember: **No site on the planet provides the level of public service you do every day.** Significant audiences – and significant programming – are yet to approach the standards of public radio. And given the inherent differences in the two media, it's likely to stay that way for a very long time.

The danger lies not in exploring this new territory; it lies in leaving the old homestead unattended.

– David Giovannoni

It Ain't Net-cessarily So

How Many of Your Listeners Are Web-Enabled?

The World Wide Web is an intriguing medium through which you might reach and serve your listeners. And just like any other medium, its ability to serve your listeners can only be assessed if you know how many are web-enabled.

Fill in the blanks below with Arbitron estimates to calculate just how many of your listeners might take advantage of a service provided on the web. You can calculate these numbers for

any daypart, program, or format for your station. All you need are the corresponding Arbitron audience numbers.

The resulting cume number estimates how many listeners to the daypart, program, or format are web enabled. The resulting AQH number estimates how many web-enabled listeners will hear any given on-air reference.

– David Giovannoni

Calculate Web-Enabled Cume

Demographic	Cume Persons Who Listen	Multiplier	Cume Persons Who Are Web-Enabled
Men 12-24	_____	.7227	_____
Men 25-34	_____	.6971	_____
Men 35-44	_____	.5710	_____
Men 45-54	_____	.5664	_____
Men 55-64	_____	.4188	_____
Men 65+	_____	.2098	_____
Women 12-24	_____	.6113	_____
Women 25-34	_____	.5859	_____
Women 35-44	_____	.4615	_____
Women 45-54	_____	.4432	_____
Women 55-64	_____	.2840	_____
Women 65+	_____	.1306	_____
		Total	_____

Calculate Web-Enabled AQH

Demographic	AQH Persons Who Listen	Multiplier	AQH Persons Who Are Web-Enabled
Men 12-24	_____	.7763	_____
Men 25-34	_____	.7197	_____
Men 35-44	_____	.5936	_____
Men 45-54	_____	.5687	_____
Men 55-64	_____	.3870	_____
Men 65+	_____	.2223	_____
Women 12-24	_____	.6531	_____
Women 25-34	_____	.5882	_____
Women 35-44	_____	.5090	_____
Women 45-54	_____	.4929	_____
Women 55-64	_____	.3170	_____
Women 65+	_____	.0951	_____
		Total	_____

What's the Buzz About the Internet?

*"Just because you're paranoid
doesn't mean they're not after you."*

– Observed by many, including Kurt Cobain
shortly before he shot himself.

A few years ago I was talking with a colleague about the Internet. He suggested that increased use of cyberspace is a boon to public radio. He painted a bright picture of listeners giving up television at night to browse the Web, listening to our stations while they surf.

In this scenario the evening dayparts become more important, as public radio's fortunes rise with those of the Internet.

I've heard less optimistic people suggest that the Internet is replacing conventional news sources, like newspapers, TV and radio. And no wonder: that's the idea you get from reports about the Internet, including stories on public radio.

Theories like these can have a significant impact on how we do our jobs. They can lead us to change our programming or our presentation style. They can cause us to ask ourselves questions like "Should I start airing a show called 'Surf Music' at night for Web browsers?" Or "What do I put in my schedule when the Internet steals my news audience?"

It's easy to go too far in this direction, carried away by the paranoia about competition and enthusiasm about new technologies.

While AUDIENCE 98 offers some unique information about Internet and on-line service use by public radio's audience, the fact is, we already have most of the answers. Just take a look at the research.

Using Arbitron data and analytic tools like AudiGraphics and the Q-system and T-system, we can check out periodically whether serious changes in listening habits are taking place

among our listeners.

Is your station gaining audience after 7 PM? Check the persons using radio (PUR) numbers at night and compare them to past books. See any increase you can't attribute to anything but the Internet theory?

Are you losing news listeners? Take a look at your AudiGraphics. Are *Morning Edition* and *All Things Considered* still your schedule's tentpoles? Is your average loyalty line at the same level? These are pretty good indicators of whether things have changed much.

If those data aren't good enough for you, AUDIENCE 98 can add to your information. For example, **your listeners' use of the Internet has not affected the amount of TV they watch.** So you can probably stow that idea about surf music.

AUDIENCE 98 also tells us that your news listeners are more likely to use the Internet than your music audience – but only by a few percentage points. **The important thing to remember is that neither group is listening less to your station because of time spent in cyberspace.**

If you're fretting about the Internet, you're not alone. Media moguls like Rupert Murdoch and Time-Warner's Gerald M. Levin are too. They've spent millions of dollars on web development and still can't find a way to profit from their investments.

As The New York Times reported, many of these big, traditional media companies are "rushing from mass to niche programming," an approach that appears to be "whittling away the economic underpinnings of their business."

Fortunately, public radio has a niche. And happily, we aren't supported by advertising revenue, which Murdoch, Levin and others see draining away as the public is given more media choices.

Our bills are paid by listeners who benefit most and value most highly from our services.

Our best strategy may be to improve these services.

That's a buzz about the Internet we need to get going. And it's an excellent remedy for techno-paranoia.

– Michael Arnold

Listening, More or Less

Having a bad day? Wondering whether all the hard work is worth it?

AUDIENCE 98 has some good news for you. Your listeners appreciate your efforts and they're showing you in a way that counts:

They're listening more.

Six out of every 10 listeners say they're listening more to public radio today than they were a few years ago.

With the next three-in-10 you're earning the same level of listening as in recent years. And just one in that crowd is spending less time with you (only eight percent of your audience, to be precise).

Though they didn't tell us directly **why** they're listening more, it's reasonable to assume that it's something you're doing.

Perhaps it's your more highly-focused format. Or the improvements in your on-air sound. Or maybe the development of hits like *Car Talk* or *Marketplace* are causing people to listen more.

Whatever the reasons, your programming and public service have earned your station a larger role in listeners' lives.

Who's Listening More?

While increased listening comes from nearly all segments of the audience, **Actualizers are more apt to be spending additional time with you.** These active, ambitious, intellectually curious VALS2 personalities make up more than a third of public radio's cume.

Though Actualizers tend to favor news and information over other programming,

those listening more to public radio are listening more to all major formats, including news, classical music and jazz. Every format is benefiting.

Are you ready for some more good news?

Don Imus may talk to Cokie, but he's **not** stealing your audience. Howard Stern may call himself the "King of All Media" but he does **not** rule public radio's listeners.

Sure, there are a few people who are listening less to public radio and more to commercial radio. But

for every one of these listeners, 12 are spending less time with commercial radio and more time with you.

That doesn't mean your listeners aren't checking out Imus, Stern or other commercial personalities. Most public radio listeners – even those in your core – tune in to other stations during the week. Like a spouse or a lover they may favor you the most, but they don't want to spend all their time with you.

So far, worried speculation about wholesale listener defections is just cocktail party talk.

Fears about commercial radio, including mega-groups taking over your market, have yet to be manifest by listener attitudes and behavior.

In fact, if there is a discernable trend, it's that public radio listeners are spending less time with commercial media.

For every listener who says he's listening less to public radio and watching more commercial TV, 30 listeners say they're spending less time with commercial TV and more time with public radio.

If he watches TV, the typical listener tuning more to public radio is doing his viewing with public television.

Who's Listening Less?

Who **is** that one listener in 10 who says he's

been spending less time with you in the past few years?

Those listening less are more likely to be **retired, unemployed, or have no more than a high school education.**

These attributes fit the descriptions of Strugglers and Believers – the VALS types who tend to be listening less. As the name suggests, Strugglers are constantly engaged in a fight to make ends meet. Believers' attitudes and lifestyles make them, in many ways, the opposites of Actualizers.

But this isn't a big deal: these two groups combined comprise less than 10 percent of public radio's cume.

Why Listen Less?

We don't know exactly what causes people to listen less. Previous studies have identified changes in lifestyle as the primary culprit. Perhaps commercial media's news and entertainment are more attractive to a few folks, especially those outside of public radio's well-educated appeal. It may be both lifestyle and competition, or neither, and it may not be under your control.

We do know this:

The only factor AUDIENCE 98 can find that is directly connected to less public radio listening is your on-air fund drives.

People who are listening less these days to public radio are less likely to stay tuned during on-air fund drives and less likely to agree that on-air drives are easier to listen to than in the past.

If on-air fund drives are driving away the audience, what can you do?

Some professionals in our industry are working on the problem right now. You can help by being open to these new ideas and testing them on your air. As AUDIENCE 98 progresses, information about listeners' attitudes and behavior will inform these experiments.

If you're back to having a bad day, you're missing a very important point.

Because you control what you broadcast, you can find a way to give listeners one less reason to listen less to you.

Or one more reason to listen more.

– Michael Arnold

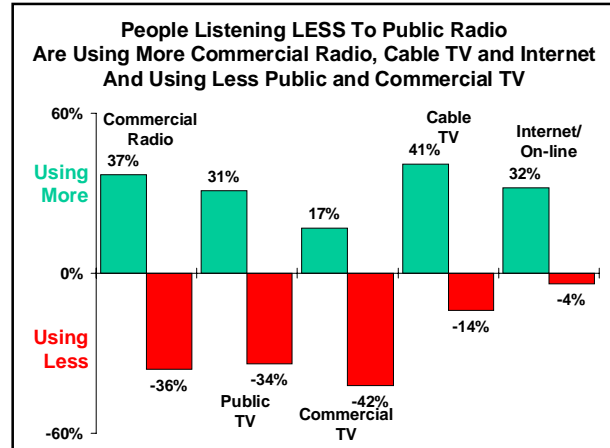
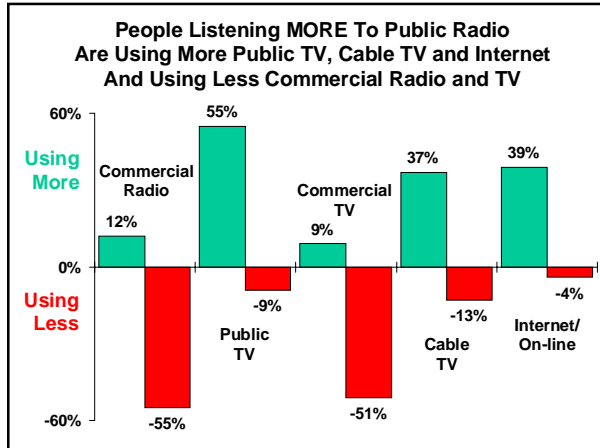
Listening, More or Less

Changes in Electronic Media Use

Persons in public radio's audience who are listening more than a few years ago are using significantly less commercial radio, and more public

television, than persons who are listening less to public radio.

– David Giovannoni



Is Public Radio Getting Too Commercial?

Is public radio getting “too commercial”?

The question has been hovering over our industry for most of its history, usually posed by insiders and media critics. And it arises naturally when trying to understand why a small fraction of the audience is listening less than a few years ago.

AUDIENCE 98 didn’t ask this question. But it did ask about listeners’ perceptions of public radio – and it appears they hear it differently than the insiders and critics.

Actualizers and Fulfilleds, the VALS types who make up the vast majority of our audience, are motivated strongly by their beliefs and ideals. If public radio is betraying its noncommercial principles, it isn’t evident to them.

Eight-in-10 say public radio reflects their social and cultural values.

Even those who are spending less time listening to public radio mostly agree. The secular church has not abandoned its gospel.

But are its hymnals sullied by the taint of advertising – the “creeping commercialism” in underwriting announcements, their increased frequency within programming?

Listeners’ perceptions of underwriting are largely neutral.

Most listeners don’t think that underwriting is becoming more annoying. Those who do aren’t listening less because of it.

This doesn’t mean they are unconcerned about commercialism in public radio. In fact,

half of all listeners who are listening more than a few years ago are wary that businesses supporting public radio may force changes in the programming.

Despite that caution,

two-thirds say they’re tuning less to commercial radio and TV and spending more time with public radio.

Our listeners’ preference for public radio and TV appears to signify the value they place on public service media. Rather than regarding our broadcasts as “too commercial” listeners seem to be using public radio as a refuge from a numbingly commercial world.

– Leslie Peters
– Michael Arnold