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Audience 88 Newsletter

**by David Giovannoni
(24 pages)**

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AUDIENCE 88

NEW PORTRAIT OF PUBLIC RADIO LISTENERS

Public radio programmers, fundraisers, promoters, and policy makers will soon have a powerful new tool, AUDIENCE 88: A COMPREHENSIVE ANALYSIS OF PUBLIC RADIO LISTENERS.

AUDIENCE 88 integrates conventional audience measurements, demographic and lifestyle information about individual listeners, programming and operational data about the stations to which they listen, and listeners' opinions on a range of matters from programming to underwriting.

The project is being conducted in an interdisciplinary fashion by three public broadcasting consulting firms: Audience Research Analysis, Liebold & Associates, and Thomas & Clifford. The Corporation for Public Broadcasting is funding the work.

The AUDIENCE 88 team will produce a series of reports that translate the research findings into practical advice and strategic recommendations in five areas: programming; underwriting support; membership; advertising and promotion; and policy, planning, and resource allocation.

Starting this month, these major reports will go to all CPB-qualified stations. Newsletters like this one will provide an overview of key findings. Teleconferences and slide presentations at conferences will put forward the data and recommendations in settings that encourage give-and-take. At the conclusion of the project, the database created for the research will be available through CPB to the public radio system to generate information on individual stations or for other systemwide studies.

ABOUT THE STUDY

A study is only as good as the data on which it is based. Great care has been taken to make AUDIENCE 88 data as reliable as possible.

The Stations. The study began with a selected sample of 72 NPR stations in 42 markets across the country. These stations are representative of NPR's full membership with respect to market size, licensee type, and program emphasis. This sample has been used by NPR since 1979 to estimate the national audience for various programs and formats under the Public Radio Audience Profile system.

The Listeners. Arbitron identified 6,315 diary keepers, all at least eighteen years old, who reported listening to one or more of these public radio stations in Spring, 1986. AUDIENCE 88 surveys were mailed to every one of those listeners, and 4,268 came back, an excellent 68 percent return.

The Adjustments. Because some people are more likely to return listening diaries than others, Arbitron statistically weights each diary to assure an accurate reflection of geography, age, gender, and, in some markets, race. AUDIENCE 88 incorporated these weightings, and then made a similar adjustment to the returned AUDIENCE 88 surveys, weighting the responses with respect to the age and gender balance of the initial sample of public radio listeners.

What About "My Station"? Because of public radio's diversity, AUDIENCE 88 tracked all responses by several station-specific factors. This has made it possible to explore whether key findings apply "across-the-board" or only to stations with a certain market size, budget level, or programming emphasis. This additional safeguard improves the reliability of the findings for an individual station.

AUDIENCE 88 reports will be a valuable asset for both the system's audience building campaign and its efforts to increase nonfederal funding from listeners and underwriters.

AN EXTRAORDINARY DATABASE

At the foundation of AUDIENCE 88 is an extraordinary database, a multi-dimensional information matrix that yields the most complete portrait of public radio's listeners ever assembled.

The first data came from the Arbitron Ratings diaries of over 6,300 public radio listeners in NPR's Public Radio Audience Profile (PRAP) system. These diaries showed how these listeners use radio in general, and how they use their public radio station in particular. By tracking what the various public radio stations were broadcasting when these listeners were listening, PRAP translates listening reported by Arbitron to listening to specific formats and programs.

This listening data was then overlaid with extensive information about the listeners themselves. An AUDIENCE 88 survey, completed by 4,286 of these listeners, ascertained a variety of demographic data, such as age, gender, race, occupation, education, income, class, and political outlook.

To these conventional measures were added the three most powerful geodemographic and lifestyle tools commercially available, PRIZM, CLUSTER-PLUS, and VALS. Each of these analytical systems was used to segment the public radio audience into groups of people based on *where* they live (geodemographics) or *how* they live (values, lifestyles, and psychographics).

The geodemographic analyses, PRIZM and CLUSTER-PLUS, simply required segmenting the listeners by their address. The more complex values and lifestyles analysis, VALS, required each person to answer twenty-two "values" questions, which were then scored under a system developed by the Stanford Research Institute.

AUDIENCE 88 is the first time these geodemographic, values, and lifestyles tools have been applied to a national sample of public radio listeners.

These standardized techniques were complemented by AUDIENCE 88 questions designed to explore the listeners' relationship with their public radio station. Listeners were asked such questions as how they first learned about the station, whether they have made a contribution, what they think about underwriters, and how important the station is to them and to their community.

The portrait was completed with data about the public radio stations themselves: their market size, the airtime they devote to various programs and formats, and using data that stations report to the Corporation for Public Broadcasting, their income and expenses, and their budget growth rate over a multi-year period.

POWERFUL ANALYSIS

Using advanced statistical techniques, the AUDIENCE 88 team is analyzing public radio's audience and applying their findings across a wide range of station operations and system-wide concerns.

For the system's managers and policy-makers, the data will provoke important questions about program development, training, minority service, and system expansion. What kinds of investments will yield the best return in service to listeners? What strategies will generate additional system support? How can public radio best reach unserved audiences? What are the implications for development of new national programming?

For programmers, there will be close scrutiny of the audience appeal of various programs and formats, searching out the likely compatibilities and conflicts in station schedules. Who does the most listening? Which programs reach their intended audience targets? Where are the best prospects for audience growth?

Development and promotion staff will receive a wealth of information. Which programs have the best audience for particular underwriters? What kinds of listeners are most likely to contribute, to what do they listen, and what kinds of pitches might be most effective? What are the best opportunities for on-air cross-promotion? What are the best media for advertising?

THE AUDIENCE 88 TEAM

AUDIENCE 88 brings together a team of public radio professionals with expertise in planning, programming, marketing, finance, and national policy. Working together from design to final reports, the AUDIENCE 88 team has adopted an integrated approach to translate research findings into practical solutions for stations and the public radio system.

David Giovannoni, one of public radio's leading researchers and program strategists and former Director of Audience Research and Program Evaluation at National Public Radio, initiated the AUDIENCE 88 project and serves as its overall director.

Giovannoni, through his consulting firm, Audience Research Analysis, advises public radio stations, as well as commercial clients such as Arbitron Ratings and the CBS FM group. While at NPR, he helped design and fine-tune network programming, and created the Public Radio Audience Profile (PRAP) system to generate national audience estimates for NPR's audience.

Public Radio Listeners: Supporters and Non-Supporters, Giovannoni's 1985 study of why listeners contribute to public radio, is a basic reference in the field. His "Radio Intelligence" columns are a regular feature in *Current*.

Linda Liebold brings extensive expertise in marketing, fundraising, promotion, and advertising to AUDIENCE 88. Her consulting firm, Liebold & Associates, works with numerous public radio and television stations, virtually every national public telecommunications organization, and several commercial clients.

With the Development Exchange, Liebold developed the *Business/Corporate Support Handbook* and the *Tune-In Advertising/Marketing Handbook*. The company also developed a station underwriting kit for the National Federation of Community Broadcasters. Most recently, Liebold developed the CPB *Maximizing Your Markets* handbook, a tool to aid stations in their efforts to target under-served markets.

Liebold was formerly Associate Director of Corporate Support for the Public Broadcasting Service, and Associate Director of National Underwriting for public station WETA.

Planning, policy, and financing implications of AUDIENCE 88 will be examined by **Tom Thomas** and **Terry Clifford**, partners in the consulting firm Thomas & Clifford. Thomas & Clifford helped organize and provides continuing support for the Station Resource Group, has undertaken major studies for the Corporation for Public Broadcasting, and provides a range of consulting services to individual public broadcasting stations.

Tom Thomas and Terry Clifford are co-authors of *The Public Radio Program Marketplace*, an overview of the sources, funding, and uses of public radio's national programming, and *The Public Radio Legal Handbook*. They were president and vice president of the National Federation of Community Broadcasters from 1975 to 1984. In 1987, they received CPB's Edward R. Murrow Award, public radio's highest honor.

COMING SOON...

The first AUDIENCE 88 report will apply the research findings to underwriting: how listeners perceive public radio underwriters, how to use the exceptional audience reach of public radio to make the case for underwriting support, and how to match prospective underwriters with your programming and formats.

The report will be mailed to all CPB-qualified stations in January.

AUDIENCE 88

UNDERWRITING REPORT RELEASED

In a few days, stations will receive AUDIENCE 88: UNDERWRITING, detailed information on public radio's audience, with in-depth guidance on how stations can use this information to increase support from local businesses and corporations. The first of several AUDIENCE 88 reports, AUDIENCE 88: UNDERWRITING illustrates how and why public radio is a cost-effective way for businesses to reach an audience of well-educated, professional, and affluent consumers.

AUDIENCE 88: UNDERWRITING provides hard evidence to document public radio's case for underwriting support. Public radio reaches over 25 percent of Americans with college degrees *each week*. Over half of public radio's audience is employed in professional, technical, managerial, or administrative positions and live in affluent suburbs or upper income urban neighborhoods. Some 40 percent of public radio's audience is "Societally Conscious;" these listeners have a "profound sense of social responsibility," attend cultural events, travel often, and enjoy sports and activities.

AUDIENCE 88 data show that public radio listeners not only think more highly of businesses that contribute to public radio, but that these people are more inclined to buy the products and services of companies that support public radio with underwriting. The report also shows that businesses that support public radio benefit from an enhanced "goodwill" image with the public.

AUDIENCE 88: UNDERWRITING also examines segments of the audience, providing detailed information that will help generate underwriting support for specific formats and programs such as classical music, information programming, jazz, opera, *All Things Considered*, *Morning Edition*, *Weekend Edition*, and *A Prairie Home Companion*. Finally, a step-by-step case study demonstrates how the

data can be applied in prospecting and presentation. The case study explains how to analyze the audience of a particular format or program, determine the appropriate companies to call, and develop an effective solicitation strategy.

Your station is entitled to a free copy of AUDIENCE 88: UNDERWRITING, a book that will become a valuable fundraising tool for your station and staff. AUDIENCE 88: UNDERWRITING was written by Linda Liebold. AUDIENCE 88 is a project of Audience Research Analysis, Liebold & Associates, and Thomas & Clifford, with funding from the Corporation for Public Broadcasting.

HIGHLIGHTS

- Public Radio listeners are well educated—sixty-two percent have college degrees.
- Over half of public radio's listeners hold professional, technical, managerial or administrative positions.
- Almost two-thirds of public radio's listeners live in households with annual incomes of \$30,000 or more.
- Half of public radio's listeners are between the ages of 25 and 44.
- Seven out of ten listeners say a company's support of public radio has a positive influence on their decision to purchase that company's products and services.
- Eighty percent of public radio's listeners hold a more positive image of companies because they support public radio.

AUDIENCE 88, YOGURT AND ME

In 1971, the unusually entrepreneurial station at which I worked regularly asked businesses to help support the station, either through outright grants or by giving our listeners discounts at their stores. Such activities were necessary to our survival, but we were separated from the mainstream of public radio, which at that time rarely sought donations from listeners, never mind the business community.

I remember sitting in the office of a large corporation that sold a variety of dairy products, including a new line of yogurt. Up to that point, our approach to a business assumed that the owner would give to our station because he or she was a loyal listener. The business donation or product discount was really just another way of making a listener contribution. But our approach to the dairy products corporation was radically different.

You should give us money, we said, because we have great popular appeal to people in their twenties and early thirties, particularly people who are politically and culturally active in our community. (The kind of people we thought probably ate yogurt.) It will enhance your reputation and image with these people if you give money to our station.

Your money will enable us to offer even better programming, which in turn will increase our audience draw, and you will become famous and loved for your association with our radio station.

As we sat in that office, making a pitch that I knew made sense, I knew there was little chance we would get the money. The vice-president we were working so hard to convince liked us well enough. He thought our station did some interesting and important programming; he agreed that his corporation was interested in reaching the kinds of people we were describing. But he wondered about our "theory" as to who listened to our station and about our idea that such an association would enhance his corporation's image. We had only minimal audience data, and even that was open to broad interpretation. Also, the kind of pitch we were making to him was a departure from business as usual in those days.

We didn't get the money.

With AUDIENCE 88 data in hand, I could walk into that man's office and walk out with \$20,000 in underwriting support. Signed, sealed, and delivered.

— Terry Clifford

"THE NPR AUDIENCE" & AUDIENCE 88

The NPR Audience, NPR's examination of the Simmons Market Research Bureau database, has been public radio's primary source of audience information for underwriting purposes. AUDIENCE 88 provides public radio with a new and valuable reference work that complements the earlier study. To *The NPR Audience's* broad overview, based on data gathered primarily for commercial clients, AUDIENCE 88 adds details that focus more specifically on public radio listeners and listening.

The NPR Audience provides a range of demographic, geographic, media usage and product usage data. AUDIENCE 88 data goes further to include what listeners think about public radio, its programming, and its underwriters, as well as how underwriting affects listeners' attitudes toward an underwriter's products and services.

AUDIENCE 88 adds more precision to our understanding of public radio's listeners. *The NPR Audience* data come from some 2,000 listener diaries kept for two-day periods over a two-year span. AUDIENCE 88 uses Arbitron's seven-day diary, and is based on 6,315 diaries kept during a twelve-week period and 4,268 responses to a follow-up survey.

In addition, while *The NPR Audience* segments listeners only by gender and public radio membership, AUDIENCE 88 looks at where listeners live, how they live, and what they believe, allowing us to understand the different audiences we serve.

Designed by public broadcasters for public broadcasters, AUDIENCE 88 augments existing knowledge with a clearer view of how listeners respond to the specific formats and programs of public radio.

PUBLIC RADIO'S APPEAL TO UNDERWRITERS

AUDIENCE 88: UNDERWRITING offers facts about public radio's audience in marketing terms prospective underwriters understand—terms that make the public radio audience a very appealing group of people for many businesses and corporations to reach. It isn't overstating the case to say that public radio is sitting on a demographic gold mine. With college degrees and corresponding high incomes, public radio listeners are attractive to many prospective underwriters. Most are professionals and managers, live in affluent neighborhoods, and are very concerned about their society.

AUDIENCE 88 allows stations to tell underwriters the age, educational level, occupation, and income of their audience, as well as where those listeners live. The data sketch a picture of such traits as purchasing habits, travel and vacation patterns, interest in cultural events, and sense of social responsibility.

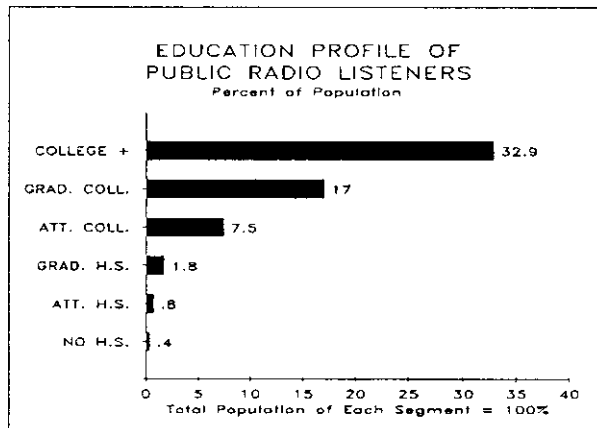
These profiles are obtained by merging demographics—*who listeners are*; geodemographics—the kinds of *neighborhoods in which listeners live*; psychographics—*what listeners think*; lifestyles—*how listeners live*; and putting all this together with information about *how listeners listen* both to public radio and to radio in general.

In addition to providing a general profile of public radio's listeners, AUDIENCE 88 maps information about listeners to several of public radio's most popular formats and programs: information, classical, jazz, and opera programming, plus *All Things Considered*, *Morning Edition*, *Weekend Edition*, and *A Prairie Home Companion*.

EDUCATED, CONCERNED LISTENERS

One theme that binds together the public radio audience is education. Over 60 percent of listeners have college degrees, and while fewer than six percent of all Americans listen to public radio each week, a *third* of those with graduate degrees use public radio each week—a remarkable reach to the country's most educated citizens.

Education is closely linked with occupation and income. Over half of public radio's listeners are



employed in professional, technical, managerial, or administrative positions, and over 60 percent live in a household with an annual income over \$30,000. These statistics tell businesses that public radio listeners are well-educated, professional, affluent consumers. Further, over 50 percent of public radio's listeners live in affluent suburbs and neighborhoods, and share predictable patterns of consumer behavior toward products, services, media, and promotions.

The educated population is weighted toward people in the mid-range for age, and here again the linkage between education and public radio listeners is obvious. Half of public radio's audience is between the ages of 25 and 44. There are more men than women college graduates and this, too, is reflected in listenership—men are slightly more likely than women to listen to public radio.

Values and lifestyle data (VALS) provide further insight. For example, while only 11 percent of all Americans are what VALS terms "Societally Conscious," 42 percent of public radio listeners fall into this category. Such people have a profound sense of social responsibility, and support various social causes. They are knowledgeable, involved, and typically participate in cultural events, enjoy frequent travel, engage in outdoor activities, and read a lot. These listeners usually enjoy the finer things in life and are often the first to purchase sophisticated electronic equipment.

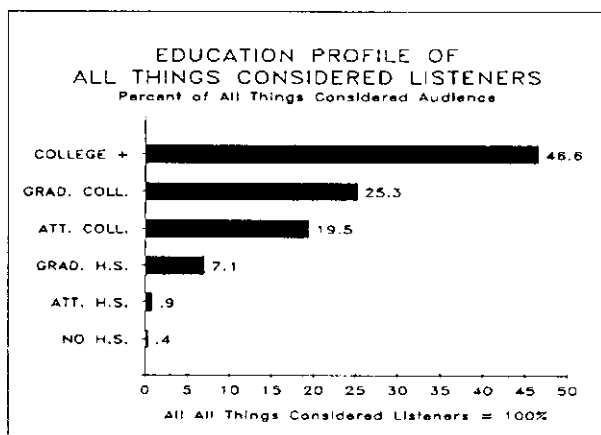
This information practically points a finger at potential underwriters. Businesses that sell or are associated with high-quality stereo equipment, com-

puters, gourmet kitchen items, travel agencies, bookstores, clothing stores that cater to white collar taste, art framing shops, and sport and camping gear stores are all examples.

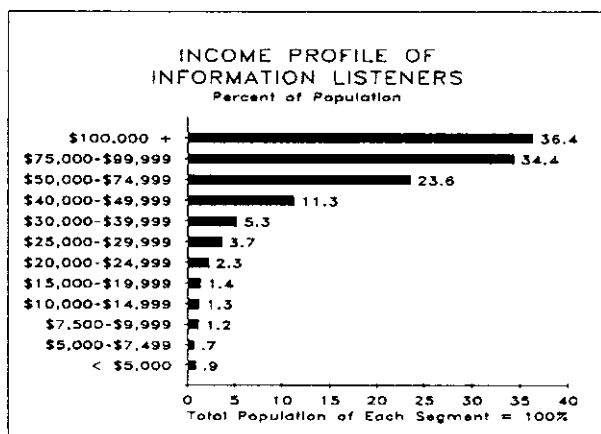
A CLOSER LOOK

AUDIENCE 88 enables stations to generate convincing evidence that underwriting messages reach specific listeners. Let's look at some examples.

All Things Considered and Education. *All Things Considered* offers an exceptional way to reach well-educated individuals. Public radio listeners who have pursued an education beyond college are 24 percent more likely to listen to *All Things Considered* than other listeners. Close to half (47 percent) of its listeners have attended graduate school. Seventy-two percent have college degrees!



Information programming and Income. Over a third of Americans with household income over \$75,000 hear information programming each week.



Classical Music Programming and Geodemographics. Compared to information programming, classical music programming appeals more to listeners in towns and rural areas. Yet audience composition is similarly upscale, with 30 percent residing in the top two socioeconomic suburban neighborhoods and another 24 percent in the next two.

POSITIVE ASSOCIATION

Eighty percent of public radio listeners say their opinion of a company is more positive when they discover the company supports public radio. Some 85 percent of public radio listeners think businesses that support public radio programming do so as a way of contributing to the public interest. And almost three out of every four listeners say that a company's support of public radio influences them to purchase that company's products and services.

These findings confirm the intuitive sense that public radio stations are an effective public relations tool for business. Simply put, listeners have positive associations with businesses that support public radio. That support is viewed as a contribution to their community's cultural and social fabric, and can enhance a company's competitive position.

The detailed profiles of public radio's listeners assembled in AUDIENCE 88 give public radio's management personnel a new and critical tool, particularly in the areas of programming, planning, and station financing. Development and fundraising staff can use AUDIENCE 88 data to both target potential underwriters and to present them with convincing and reliable data that public radio is a desirable vehicle for their message.

UNDERWRITING'S AUTHOR

AUDIENCE 88: UNDERWRITING'S author is **Linda Liebold**, president of Liebold & Associates. With the Development Exchange, Liebold developed the Business/Corporate Support Handbook and Tune-In Advertising/Marketing Handbook. Liebold was formerly Associate Director of Corporate Support for PBS, and Associate Director of National Underwriting for public station WETA.

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.

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THE AUDIENCE 88 DATABASE

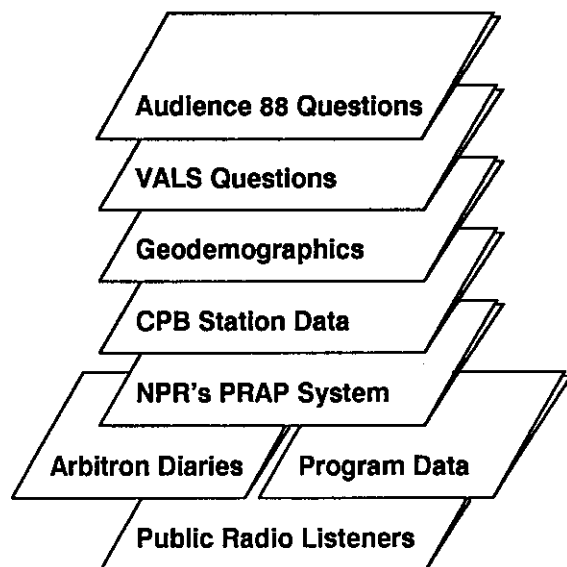
USING THE NUMBERS

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

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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.

AUDIENCE 88

THE CHANGING MEMBERSHIP ENVIRONMENT

Audience growth leads membership growth. When a station experiences a period of rapid audience growth, as many did in the early 1980's, it sees a coinciding new member growth a couple of years later. But when a station experiences a period of little audience growth, or when membership growth outpaces audience growth, the rate at which listeners become members will eventually decline.

This is a mathematical necessity. When audiences increase, the pool of potential members fills; when the potential member pool is drained (by converting listeners to members) faster than it is filled (by getting new listeners) it empties.

Further, as the pool of non-members recedes, the people remaining listen less and consider the station less important than those who have left the pool to become members. These remaining non-members are less inclined ever to support public radio. As demographic, psychographic, and utiligraphic differences between members and non-members widen, public radio will find it increasingly difficult to lure new members from the pool.

ON-AIR FUND DRIVES

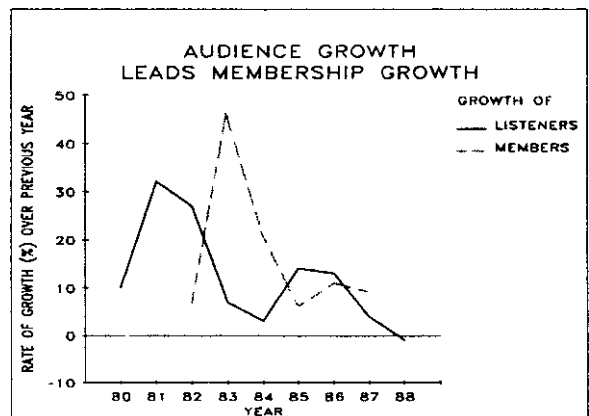
Reach and frequency analysis explains the success of on-air drives, illuminates why members find them so pervasive, and predicts their eventual decrease in effectiveness. Reach is the proportion of an audience segment that hears at least one pledge break. Frequency is the number of times people in this segment hear a pledge break.

Assuming that all listeners tune in a least once per month, on the first day of a pledge drive over half of the station's members hear at least one pitch, compared to only one-quarter of those who have never been members. It takes four days of pitching—two breaks per hour, 18 hours per day—to reach half of all never-members with one break.

By the end of seven days, almost two-thirds of all listeners who have never been members have heard an average of 11 breaks. This long reach and high

AUDIENCE LEADS MEMBERSHIP

This graph compares the annual audience and membership growth rates for CPB-qualified stations over a nine-year period. Audience rates are based on the system's average audience as estimated by Arbitron's Nationwide studies; membership rates are based on data produced by CPB's Annual Financial Reports (1988 data are not available at this time).

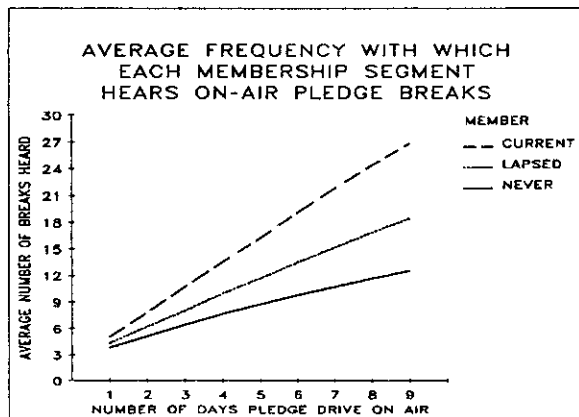
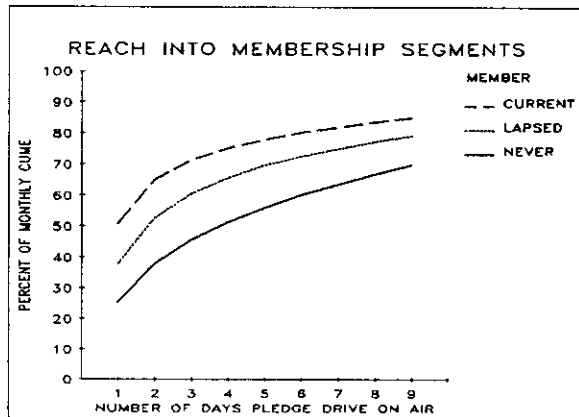


frequency are the reasons why on-air drives bring in the number of new members that they do.

On-air drives have an even longer reach and higher frequency among members. By the end of seven days, five out of six current members have heard an average of 22 breaks. While some members hear fewer, others hear more. In a number of recently conducted focus groups, public radio members report that they tune to other stations or turn off their radios to avoid on-air drives.

As the ratio of members to non-members rises, on-air drives escalate their levels of member disruption while declining in their ability to reach non-members with sufficient frequency.

Reach estimates assume that all listeners hear at least one pledge break per occasion for drives between 1 and 9 days long. Frequency estimates assume two pledge breaks per hour, 18 hours per day.



REACHING NON-MEMBERS

Acquiring new members requires reaching listeners who are not already members. People who don't listen have no reason to support public radio. People who are members are already committed. The remaining group—people who listen to public radio but who are not members—is the prime target for membership acquisition activities.

The effectiveness of on-air efforts to turn non-members into members depends on success in reaching these particular listeners. Because the mix between members and non-members differs throughout the day, a strategy for reaching listeners who are not members requires an understanding of how formats are related to non-membership.

While non-members account for 75 to 80 percent of a typical station's weekly audience, AUDIENCE 88 estimates that about half of public radio's AQH audience is composed of non-members. This is because non-members use public radio much less than members do. A more conservative estimate which assumes that more listeners report that they are members than is in fact the case still leaves us with the assumption that at least one of every three AQH listeners is already a member.

The ratio of two non-members to one member is actually an average across all types of programming. AUDIENCE 88 finds that certain formats and programs are more likely than others to attract and serve people who are not yet members. Some programming will reach the target of listening non-members better than other programming will. The member percentages of the audiences for various programming are included in the *Membership* report.

CRAFTING MEMBERSHIP MESSAGES

AUDIENCE 88 *Membership* moves beyond the documentation of the demographic, utiligraphic and psychographic traits of public radio's listeners and applies these same segmentation systems to listeners

Continued on page 4.

WHY DO LISTENERS BECOME MEMBERS?

Programming makes a person a listener, but what turns a listener into a member? AUDIENCE 88 finds that a listener's decision to become a member is first and foremost based on use of the service and a sense that the service is important.

- Listeners who use public radio's programming regularly and often are much more likely than others to be members.
- Listeners who feel that public radio is important in their lives are much more likely than others to be members.
- A listener's ability to afford a gift to public radio is important, but only in the context of how well programming is serving the listener.
- Listeners who feel that public radio is important in their lives are both psychographically and demographically different from people who do not consider it so.
- These differences extend to the kinds of listeners who are attracted to the distinctive formats and services that public radio offers.

Two reasons are generally offered to explain why listeners become members. The first holds that people support public radio because it is important to them. The second states that they support it out of a sense of importance to others. These are, respectively, the personal importance and altruistic importance theories of public radio support.

The personal importance theory states that people consider public radio important in their lives because they use it. The more people use a station, the more it becomes entwined into their daily routine; the more a station is part of a daily routine, the more a person considers it personally important.

This theory holds up when tested by AUDIENCE 88's data. Listeners for whom public radio is personally important are twice as likely as other listeners to be current members. These listeners pay for public radio because they use it—just as they pay for a theater seat, a magazine subscription or an airline ticket.

The altruistic importance theory states that people support a public station because they believe it is a "public good." Perhaps they consider it to be a community resource, something important for other people.

AUDIENCE 88 finds no direct link between altruistic importance and membership. This is not to say that members do not consider their public station to be an important community resource—they do. But an altruistic attitude toward public radio is most strongly correlated with use of its service by well-educated listeners who place public radio in the same category as such community resources as symphonies and other community cultural resources.

This discovery has important ramifications for how and why programming may be done at stations. Programming tactics that maximize listener satisfaction and encourage using the station are the most critical controllable factors turning listeners into supporters.

Another important ramification is that listeners pay for the use—not the availability—of programming. AUDIENCE 88's data refute the theory that the availability of highly targeted programming that doesn't get much listening or pledging causes people to give because that programming is perceived as a public service.

Stations should design membership messages based on the fact that listeners are themselves using and enjoying the program service—not that they are subsidizing a public good for other listeners. Membership messages should reflect the characteristics of the listening non-member audience and, when delivered on-air, the messages should be scheduled for maximum impact.

AUDIENCE 88 data indicate that the ability to support becomes a factor only after the desire to support is apparent. Many non-affluent listeners support public radio, just as many affluent listeners do not. A listener's ability to afford a membership is important only after his or her use of public radio and its resulting personal importance are taken into account.

Continued from page 2.

who are members and listeners who are non-members. Just as listeners to different formats and programs differ significantly, non-members differ significantly according to what they listen to.

For instance, half of the non-member audience for opera is over 50 years old, compared to fewer than one in five *Morning Edition* non-members. *All Things Considered's* non-member audience is more likely to be Inner-Directed, Societally Conscious than jazz's non-member audience, which is composed more of Outer-Directed listeners. Classical music's non-member audience is evenly split between Inner-Directeds, most of whom are Societally Conscious, and Outer-Directed Belongers and Achievers.

A station's premiums should vary according to the kind of listener that the station is trying to convert to a member. Premiums for Inner-Directed, Societally Conscious listeners might include theatre tickets, hiking equipment, airplane tickets, or subscriptions to such magazines as *Harpers* or *National Geographic*. Premiums attractive to Belongers, who are home-loving and family-oriented might include kitchen utensils, subscriptions to home and gardening magazines, and how-to books. Premiums for Outer-Directeds would include tickets to spectator sports, business-oriented audio and video tapes, and airplane tickets.

Other components of a station's messages take into consideration the kind of non-members listening to particular formats and programs as well.

CONSEQUENCES

How stations use the information presented in the *Membership* report depends on their situation. For stations enjoying consistent and significant audience growth for the last few years, there is less urgency to examine alternative techniques. Applying the reach and frequency mechanics of on-air drives, stations should work to make their messages more sophisticated, intelligent, and "listener-sensitive" in order to minimize disruption of member listening.

But if a station has not significantly increased its audience in the last year or two or three, it is

poised for serious declines in new-member rates—especially if it relies heavily upon on-air drives.

Public broadcasters who aspire to higher levels of listener support have three broad options:

- Substantially reshape the appeal of the station's programming to reach new groups of listeners who are likely to become supporters.
- Fine-tune the appeal of current programming to increase listening and perceptions of importance by existing listeners and other people like them.
- Work smarter and harder at mining the receding pool of listening non-members.

The first option assumes a station's listeners do not find its programming important enough to support it, or that the station is programming to too small a group of people to meet the station's financial needs. The further a station ventures from its current appeal, the more it will be "starting from scratch" in establishing the patterns of use and personal importance that ultimately translate to membership support.

The second option assumes that with marginal changes to strengthen appeal and increase accessibility, a station can become more important to current listeners and other people like them. This option reaps immediate membership rewards by building on the existing listener base and moving more listeners across the threshold to membership.

The third option highlights the continuing challenge faced by public radio. It requires continued experimentation with and fine-tuning of prospecting, pitching and renewal techniques.

AUDIENCE 88 *Membership* was written by David Giovannoni.

This AUDIENCE 88 UPDATE was written by Tom Thomas and Terry Clifford.

AUDIENCE 88 is funded by the Corporation for Public Broadcasting.

AUDIENCE

88

MAKING CHOICES: STRATEGIES & TARGETS

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

Issues & Implications, AUDIENCE 88's final report, returns to this central concept of programming appeal for an in-depth look at the different kinds of listeners who respond to public radio's programming, and at the different listening patterns found within the public radio audience. Using this analysis, the report explores two critical issues: the feasibility of significantly increasing the number of listeners served by public radio and the challenge of targeting who those listeners will be.

FORMATS AND LISTENER TYPES

AUDIENCE 88's *Programming* report introduced the concepts of core public radio listeners, people whose favorite station is a public station, and fringe listeners, who spend most of their listening time with another outlet. Core listeners give the best reading of public radio's overall appeal.

We applied this same approach to the listeners of public radio's major formats. There are listeners for whom information programming, for example, is their favorite public radio format—they use it more than any other. These listeners are information programming's core audience, and they provide the clearest sense of that format's appeal. We also identified core listeners for classical music and jazz, and a special group that makes heavy use of two or more formats—mixed format listeners.

Information core listeners are Inner-Directed, Societally Conscious people clustered around the 35-to-44-year-old bracket. They are better educated and more affluent than classical or jazz listeners.

Classical core listeners are older than other listeners. More Inner-Directed and Societally Conscious than the U.S. population, compared to other public radio listeners they are more Outer-Directed, with many in the Belonger values-and-lifestyle type.

Jazz core listeners are younger. Like classical listeners, they are more Outer-Directed than information listeners. They have less education, and are less affluent, than listeners to other formats.

The fascinating group is the mixed format listeners. They tune in public radio two to three times as often as other listeners, their listening time averages three to four times greater than other groups, and they are very loyal to their public station.

Mixed format listeners are public radio's most Inner-Directed, most Societally Conscious, best-educated listeners. They are as affluent as news listeners, and are concentrated in the 35-to-44-year-old group. They believe their public station is very important to them and their community. A *majority* say they are current members.

The mixed format listeners, almost all of whom come to public radio for both information and music, are only a quarter of public radio's listeners but they account for 54 percent of all listening. Mixed format listeners are important financially. They are 39 percent of public radio's members, and provide 42 percent of stations' listener income.

Mixed format listeners vividly demonstrate that public radio's strongest audience appeal transcends genre and may, in fact, be dependent on such transcendence.

AUDIENCE DOUBLING: REALISTIC GOAL?

Public radio's audience-doubling goal has proved more elusive than many had hoped. The national AQH audience has been essentially flat for the past two years, and four years after the goal was adopted, NPR reported that its members' audience had grown by only 26 percent. Is the goal realistic?

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

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

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

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

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

Increases in numbers of listeners must be accompanied by increases in the amount of listening by both current and new listeners. Public radio lis-

teners spend a little less than 8 hours per week with their public radio station, considerably less than the 9 to 12 hours per week that the major adult formats generate on commercial radio.

AUDIENCE 88 developed a model for the kinds of growth in listeners and listening that would be required to meet the audience-doubling goal:

- Increase weekly reach to graduate school attendees from 38 to 53 percent.
- Increase weekly reach to Americans in the 35-to-44 age bracket from 8 to 13 percent.
- Increase weekly reach to Societally Conscious listeners from 20 to 33 percent.
- Increase average listening time by 15 percent (1 more listening occasion per listener per week).

These are very ambitious but not impossible targets. They suggest that the audience doubling goal is realistic but that achieving it with programming that matches current appeal will be difficult.

PROGRAMMING STRATEGIES

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

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

Let Content Shape the Appeal

The traditional focus of public radio program decision making has been to define service almost exclusively in terms of content. Guided by a com-

bination of mission and a desire to provide an alternative to commercial programming, a station would select the genre or genres of programming that, in turn, would shape its schedule.

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

A principal virtue of this strategy is its relative simplicity. Once one decides a particular genre of programming is, or is not, a part of the mix, a host of other decisions fall into place.

The principal limitation of a content-based strategy is that it may not result in a target of sufficient clarity to compete effectively in the radio marketplace. Given the diverse interests of most stations and their licensees, there is a continuing danger of presenting a diffuse, even incoherent image to prospective listeners—a consequence almost certain to result in less listening.

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

Such knowledge might be used to rearrange the program schedule, eliminating the most egregious shifts in appeal—what the AUDIENCE 88 *Programming* report called “appeal seams.” An appeal analysis can inform on-air cross-promotion strategies, such as selecting combinations of programs to promote from and to that are closely matched in appeal. Awareness of appeal can also enhance membership drives, highlighting the approaches that will be convincing to the different kinds of listeners who are attracted to different kinds of programming.

Appeal-Based Strategies

Appeal-based strategies for service shift the emphasis from *what* is being presented to *whom* is being served. For some, the notion of an appeal-based strategy implies programming designed to

appeal to a single audience segment. Many of the proponents of appeal-based programming have just such a focus in mind.

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

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

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

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

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

There may be a general reluctance on the part of both stations and national organizations to make explicit audience-targeting decisions. An important contribution of AUDIENCE 88, however, is to highlight the extent to which targeting decisions are *already* embodied in programming and funding decisions at the local and national level. The challenge ahead begins with taking responsibility for choices already made. The next step is deciding whether to affirm those choices or change them.

SELECTING TARGETS

In seeking to reach particular audience targets it is critical to explore whether the listener characteristics one hopes to achieve play a role in why people listen or only describe those who do. If it is the latter, the target one seeks to achieve may not be the key factor on which to focus.

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

Some demographic factors are clearly of major importance in targeting radio. Commercial stations, for example, target principally on the basis of age, sex, race, and attitudes. But demographic factors that are useful in describing radio listeners may contribute little to an understanding of why those listeners listen.

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

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

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

The central point is that changes in audience composition must be achieved through a focus on the

factors that truly affect listening. A related implication is that efforts to achieve a particular demographic outcome through changing a key variable may produce a cascade of other consequences because of all the other factors that are linked to that variable.

Targets That Make Sense

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

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

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

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

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