



From the *ARANet* On-Line Library
of Public Radio Research

**A Long View of Public Radio's
National Audience Growth:
Availability and Accessibility Revisited,
Parts 1 & 2**

by David Giovannoni
(9 pages)

Originally published as:

Giovannoni, David. "Radio Intelligence: A Long View of Public Radio's National Audience Growth, 1970-1983. The Service Grows Through Availability, Then Through Accessibility." Current, Volume 11, Number 3, February 1992.

Giovannoni, David. "Radio Intelligence: A Long View of Public Radio's National Audience Growth, 1983 to Today. Major Factor Has Been Programming's Greater Accessibility." Current, Volume 11, Number 5, March 1992.



aranet.com

Copyright © 1992
Corporation for Public Broadcasting
Copyright © 1999
David Giovannoni, Audience Research Analysis
All rights reserved

A LONG VIEW OF PUBLIC RADIO'S NATIONAL AUDIENCE GROWTH: AVAILABILITY & ACCESSIBILITY REVISITED

Part 1: 1970 to 1983

by David Giovannoni

As measured by the number of listeners, 1983 marked the year that the system of NPR member stations emerged from a condition of relative obscurity into a network of marginal significance.
— *NPR Research & Evaluation Report, June 1985*

Public radio serves more Americans today than ever. Each week, 16 million people tune in to CPB-supported stations and listen an average of eight hours. More people will hear a single story on today's *Morning Edition* or *All Things Considered* than listened to public radio in a whole week in the early 1970s.

Although quite an accomplishment, audience growth hasn't been steady. At times it surged at amazing rates; at others it flowed more modestly. In one notable year audience was even lost. This irregularity is the result of the waxing and waning of forces that have driven national audience growth for the last 20 years.

Public radio has progressed through at least three phases of national audience growth — each characterized by shifts in the forces causing people to listen. This and the next column will track these forces over time. Armed with some knowledge of how some of these forces changing today, we can even anticipate the next phase of audience growth.

Two forces explain much about the growth of public radio's national service:

- *Availability* — the ability of a potential audience to receive public stations' signals.
- *Accessibility* — the extent to which programming encourages listening, thereby turning a potential audience into an actual audience.

Availability and accessibility ask: Can a person hear a public radio station, and is its programming listenable? Introduced by NPR in a June 1985 *Research & Evaluation* report, these concepts continue to explain the growth of national audience.

Phase One: 1971-1980

“Public” radio's first decade was marked by the amalgamation of “educational” stations and the construction of the basic public radio system. National audience grew from 1.3 million listeners per week in 1971 to 5.3 million in 1980 — increasing at a relatively steady rate of 450 thousand weekly listeners per year.

Programming remained relatively stable in the seventies compared to later years. Na-

tional audience growth was caused primarily by the increasing *availability* of programming — not so much by big changes in its *accessibility*. Availability took several forms during this period. Public radio became available *where people lived* (coverage), available *when they listened to radio* (hours on-air), and available *on the band they used* (FM).

Coverage. The number of stations supported by Community Service Grants grew from 80 in 1970 to 200 in 1980. Most of these stations provided cities and towns with their “first service.” This translated directly into more Americans being able to tune in a public station — from roughly one-third in 1970 to two-thirds in 1980.

During the first part of the decade, CPB’s CSG program encouraged stations to strengthen their signals and expand their reach. Until 1975 any FM station wanting CSG support could get by with only 250 watts at 500 feet HAAT; in 1975 this requirement was upgraded to 3,000 watts at 300 feet.

Hours on Air. Putting a station into a market is only part of making it available — turning it on is another. Obviously, a station can serve listeners only when it is on the air. Less obvious to many in the early seventies were the radio prime times during which audiences could be best served. Many stations didn’t go on the air until late morning or early afternoon. Some even went dark during school or staff holidays.

Encouraging regular operation was a primary goal of CPB’s CSG program between 1971 and 1976. In 1971, a station could get CPB support and be on the air only eight hours per day, six days per week, forty-eight weeks per year. In 1976 the standards were raised to continuous operation fifty-two

weeks per year, seven days per week, eighteen hours per day.

FM. Had spectrum been reserved for “educational” radio on the AM band instead of on FM, the public radio system as we know it today would be facing extinction. Just like AM. In fact, the public radio system as we know it today probably would never have served significant numbers of listeners.

The FM band has been the right place to be during the last 20 years. In 1970 Americans spent only one hour with FM for every four spent with AM. Ten years later FM had overtaken AM as America’s band of choice. Many people discovered public radio when they discovered the FM band. Public radio became available to more people because it was on the right band at the right time.

Phase Two: 1980-1983

1980 marked a new era of explosive audience growth. Between 1980 and 1983, public radio’s national audience grew from 5.3 million listeners per week to 8.7 million — a phenomenal three year growth rate of 63 percent. Even more significant was the doubling of the average quarter-hour audience.

Geographic expansion and the shift of listeners to FM continued to enlarge public radio’s potential audience during this period and, indeed, throughout the 1980s. But in the early 1980s its programming changed so radically that *accessibility* eclipsed *availability* as the primary force driving audience growth.

Programming changes were driven by a number of factors precipitated, in great part, by efforts sponsored by CPB and NPR. Throughout the 1970s, CPB and NPR had

worked together to track listening to their stations. By the turn of the decade the role of audience research and researchers had changed from passive to active. Tom Church at CPB and Larry Lichty at NPR vigorously advanced the notion that public stations take seriously how well programming served listeners. They suggested how programs — in fact, entire programming schedules — could be made more *accessible*, more listened-to, and more of a public service.

Some stations had already figured this out for themselves. At others, the idea that more listeners could be served without sacrificing programming ideals was a difficult one to accept. In the late seventies and early eighties licensees' "mission statements" — many forged by educational institutions in the days of educational radio — were revisited, reinterpreted, and in a few cases adjusted to allow stations to operate in a competitive marketplace instead of a captive classroom.

Many on-air positions staffed by students and volunteers were upgraded by training, tighter managerial control, and in many cases replacement by full-time professionals. Research at NPR documented changes in program schedules as well. The use of discrete programs gave way to consolidated blocks of single-genre programming. Reducing the number of "seams" in this way served to stabilize the station's appeal, identity, and ability to serve listeners from one minute, hour, and day to the next.

Morning Edition was the national service that most embodied public radio's conceptual shift toward audience service via accessible programming. It encouraged stations

to be on the air in radio's prime time with strong national programming augmented by the best material they could produce. In almost all cases, *Morning Edition* served many more listeners than the programming it displaced. Even more important, *Morning Edition*'s "format" concept served as a model for many stations replacing discrete programs with larger programmatically-coherent blocks.

Of course, more listening by more listeners meant more audience support — a fact not lost on public broadcasters facing reductions in governmental and institutional funding in the early 1980s.

These accessibility forces caused on-air hours to increase beyond CSG minimums, thereby contributing an additional availability factor. *Morning Edition* encouraged many stations to push forward their sign-on to 5:00 or 5:30 a.m. to get a running start on prime time. At the other end of the day, stations were pushing back their sign-off until 1:00 or 2:00 a.m. and even beginning 24-hour operation.

This golden age of audience growth was interrupted by a financial crisis. Between the Spring of 1983 and the Spring of 1984, public radio's attention turned away from audience, and its audience turned away from public radio.

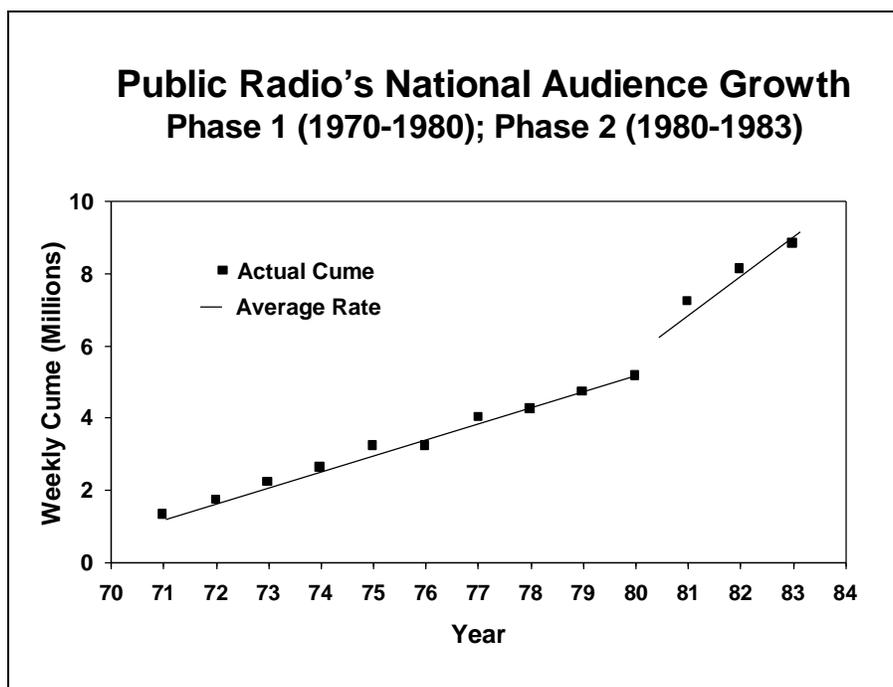
David Giovannoni heads Audience Research Analysis, an independent firm specializing in radio audience research. The Corporation for Public Broadcasting funded this report. Opinions expressed in it are the author's and do not necessarily reflect opinions or policies of the corporation.

Annual Broadcast Hours Per Week

Year	CPB CSG Requirement	Average Annual Hours per Station
1970	2,304	--
1972	3,744	--
1974	5,096	--
1976	6,552	--
1978	6,552	6,773
1980	6,552	6,795
1982	6,552	6,892
1984	6,552	6,968

Encouraging regular operation was a primary goal of CPB's CSG program between 1971 and 1976. In 1971, a station could get CPB support and be on the air only 8 hours per day, six days per week, 48 weeks per year. By 1976 the standard had been raised to continuous operation 52 weeks per year, 7 days per week, 18 hours per day.

—Source: SRG, CPB Katzman Programming Reports



Public radio's national audience grew from 1.3 million listeners per week in 1971 to 5.3 million in 1980 —increasing at a relatively steady rate of 450 thousand weekly listeners per year. Between 1980 and 1983, public radio's national audience grew from 5.3 million listeners per week to 8.7 million — a phenomenal three-year growth rate of 63 percent.

— Weekly Cume Persons 12+. Source: CPB; Arbitron Nationwide

A LONG VIEW OF PUBLIC RADIO'S NATIONAL AUDIENCE GROWTH: AVAILABILITY & ACCESSIBILITY REVISITED

Part 2: 1983 to Today

by David Giovannoni

If [public radio] is to double its audience between 1984 and 1989, it must return its attention to maintaining the availability and increasing the accessibility of its programming.
— NPR Research & Evaluation Report, June 1985

Public radio has progressed through at least three phases of national audience growth — each characterized by shifts in two factors causing people to listen:

- *Availability* — the ability of a potential audience to receive public stations' signals, and
- *Accessibility* — the extent to which programming encourages listening, thereby turning a potential audience into an actual audience.

From the time the Public Broadcasting Act of 1967 was signed into law until 1980, the increased availability of public radio served as the primary cause of its national audience growth. Nearly a half-million listeners per year discovered this new service throughout its first decade. As the 1970s came to a close, public radio programming was serving more than five million listeners each week. One station per market was the rule.

By 1980 nearly two-thirds of all Americans could receive a public station signal. With this critical mass in place, attention turned to making programming more “listenable,” or accessible. As a result, public radio enjoyed an unprecedented era of audience growth

beginning in 1980 — increasing its weekly audience by nearly two-thirds and doubling its average quarter-hour audience in a three-year period. In 1983, 4.4% of all Americans over the age of 12 listened for at least five minutes in a typical week, and 1.5% of all radio listening in America was to public stations.

National Public Radio's financial crisis of 1983 put an unfortunate end to this extraordinary growth. Between the Spring of 1983 and the Spring of 1984, public radio's attention turned away from programming and audience, and audience turned away from public radio programming. A third phase of national audience growth began.

Phase Three: 1983 and Beyond

Public radio's first phase of audience growth was caused primarily by making public radio available. Its second phase was marked by an explosive increase in the accessibility of programming. This third phase — since 1983 — has been driven by a combination of availability and accessibility factors.

Accessibility. In 1984 Tom Church, head of the newly formed Radio Research Consor-

tium, called for a doubling of the national audience in five years. Embraced at first by stations and later by NPR's Audience Building Task Force, the audience-doubling theme refocused attention on programming and its impact on audience service.

“Audience doubling” has been the underlying theme of numerous training and professionalization efforts sponsored by CPB, RRC, the Public Radio Programming Directors Association, regional organizations, NPR, and others. It has proven to be an important characteristic of public radio's third phase of national audience growth — one in which programming accessibility has been steadily increasing.

National audience has yet to double. And although listening at some stations has in fact doubled, tripled, even quadrupled during this time, most growth at most stations has been incremental. Many stations made their fundamental programming changes in the late seventies or early eighties. And although some relatively minor changes precipitated seemingly huge public outcries, most stations spent the rest of the 1980s fine-tuning rather than drastically overhauling their programming.

Producers of national programming have also begun to “think audience” — inspired in great part by CPB's Program Fund. Begun in 1986 to promote new national programming endeavors, the Program Fund's management has focused attention on listener response to the programs it funds. It has even encouraged producers to take their concepts to listeners before producing or distributing the first hour of programming.

Availability. Geographic expansion has also been a continuing theme throughout the eighties. Today nine in ten Americans live under a public radio signal, up from seven in

ten at the start of the 1980s. Much of this increased reach is attributable to the upgrade of existing facilities and the expansion by public radio licensees who already had a public radio operation. Translators extended reach economically, and local or statewide networks realized economies of scale.

In fact, the eighties were to second service what the seventies were to first service. Today most Americans can receive at least two public radio stations.

The eighties also marked the continued abandonment of AM. FM now accounts for nearly four in five hours spent with radio — the reverse of the FM to AM ratio of twenty years ago.

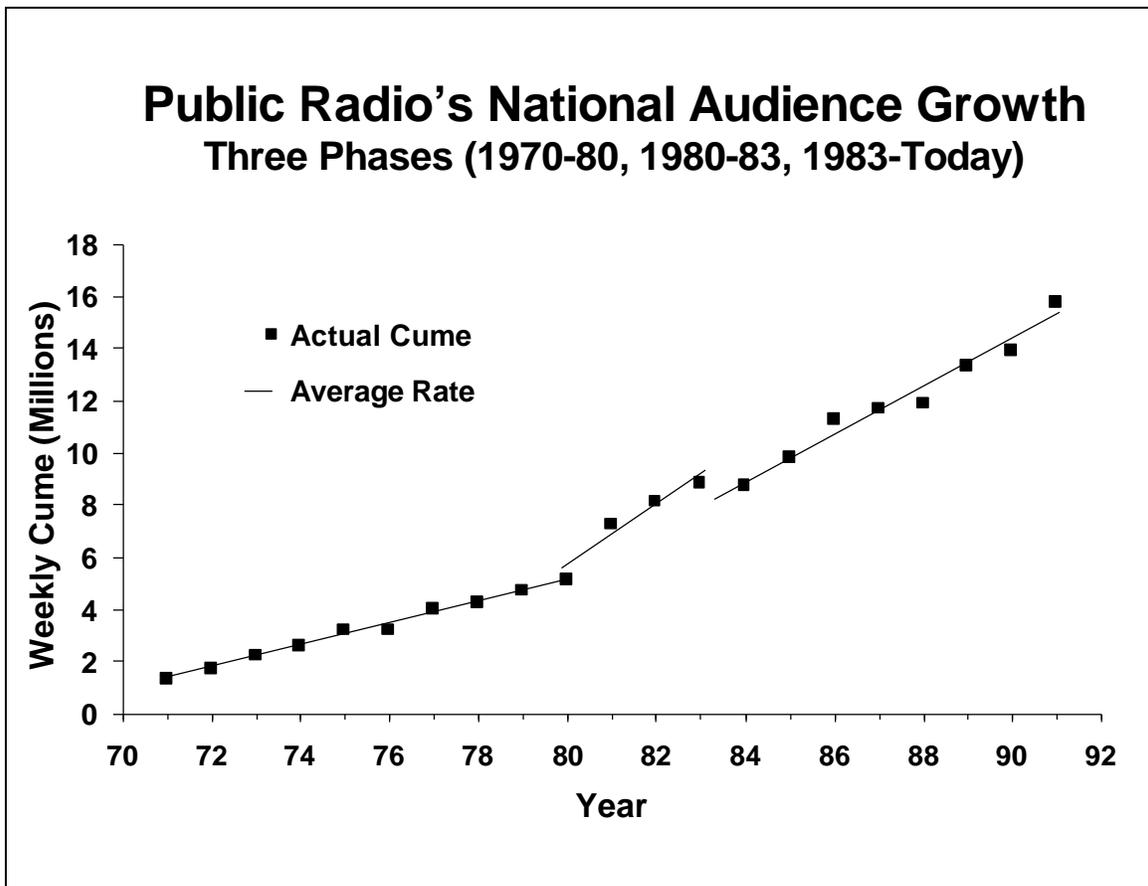
Geographic expansion and the audience's migration to FM have made public radio more available than it ever has been. Indeed, public radio is about as available as it ever will be. The flow of audience is still to FM, and geographic expansion into unserved markets also continues, but the capacity of each to increase national audience service has never been smaller.

Having ridden the wave of listeners to FM, and having expanded its signal to nine-in-ten Americans, public radio can no longer count on these basic availability forces to fuel its audience growth. Population growth will be the primary availability-increasing factor left by the end of the decade, and even it will not support the audience growth rates that public radio has come to expect over the last twenty years.

If and when public radio enters a fourth phase of national audience growth, it will be fueled primarily by other forces. “Appeal” will join accessibility and availability as a third driving force. Audiences will be better served by stations who focus on a consistent

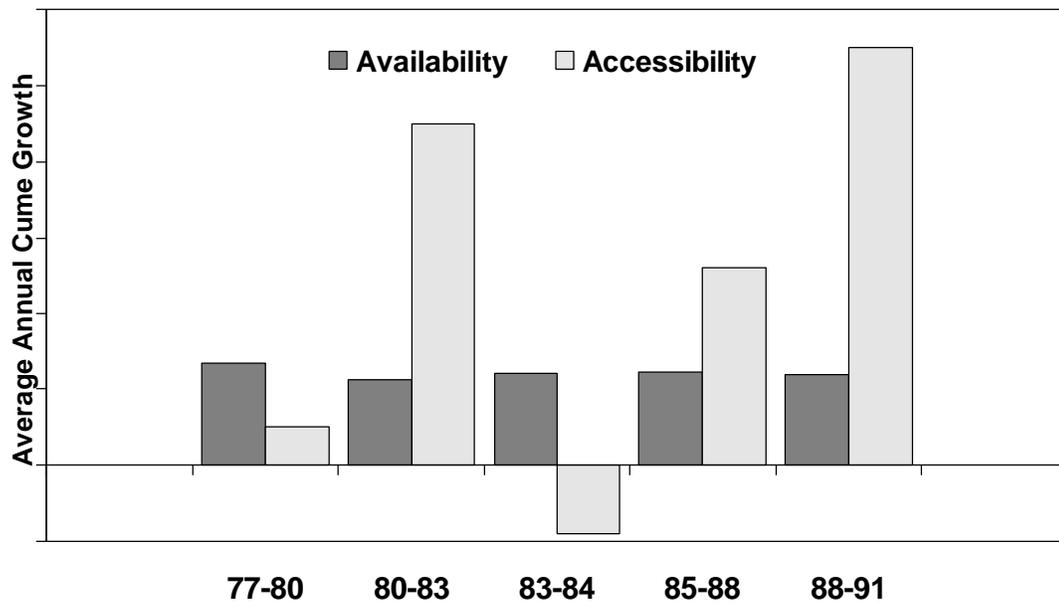
range of programming that is done very well. In fact, public radio may have already slipped into this fourth phase without fanfare — just as it has slipped through the first three.

David Giovannoni heads Audience Research Analysis, an independent firm specializing in radio audience research. The Corporation for Public Broadcasting funded this report. Opinions expressed in it are the author's and do not necessarily reflect opinions or policies of the corporation.



Public radio's history of national audience growth is marked by three distinct phases, as shown on the top graph. In the first phase, through 1980, people entered the national weekly cume as public radio became available to them. Changes in programming made public radio much more accessible in the second phase (1980 to 1983), which caused an explosive increase in listeners and listening. This is seen in the steeper slope of the line, which indicates a much higher rate of growth. Since 1983, growth has been driven by a combination of availability and accessibility factors.

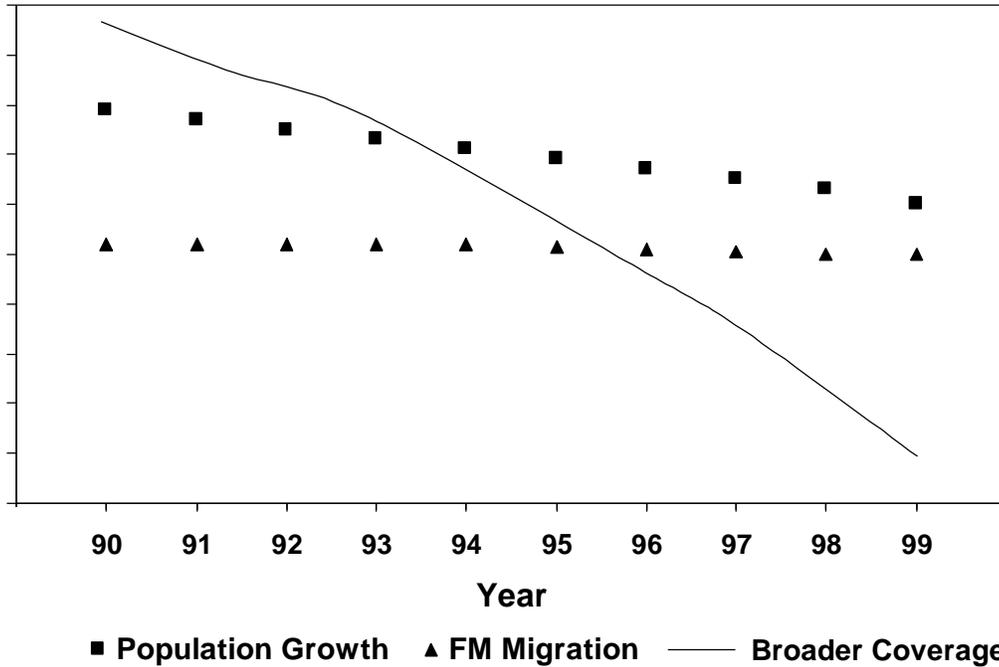
Public Radio's National Audience Growth Listeners Gained/Lost Each Period From:



The middle graph estimates the relative numbers of listeners gained in each period due to availability factors (population growth, migration to FM, and increased coverage) compared with other factors, assumed here to be caused primarily by greater accessibility.

Through 1980, increases in availability drove audience growth. Between 1980 and 1988, increases in accessibility caused people to turn to public radio at unprecedented rates. Between 1983 and 1984 the audience that was gained by increases in availability was lost by decreases in accessibility. Since then, accessibility has surpassed all three availability factors in its relative contribution toward growth in national audience service.

Importance of Availability Factors Contributing to National Audience Growth



The audience gained by bringing a first public radio signal to more Americans (coverage) will soon diminish to relative insignificance, even given the most optimistic assumptions. Population growth, and to a lesser extent continued migration to FM, will be the dominant availability forces through the rest of the decade.

Overall, as the incremental effectiveness of availability factors wanes, a new phase of growth will be marked by increases driven primarily by accessibility and perhaps other factors.