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AUDIENCE 88
Advertising and Promotion

by Linda K. Liebold
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Advertising & Promotion

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A COMPREHENSIVE ANALYSIS
OF PUBLIC RADIO LISTENERS

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FOREWORD

There has been a long-standing debate between public radio programmers and promoters as to the value of advertising and promotion in audience building. Many programmers believe the way to build audience is through programming. Many promoters think the way to increase audience is through advertising and promotion.

AUDIENCE 88 suggests both are correct. With proper targeting, programmers can encourage current listeners to listen more often and promoters can hasten the next tune-in of those who listen occasionally. Both programmers and promoters play important roles in audience building.

The purpose of this report is to assist public radio professionals in their advertising and promotion decision making. *AUDIENCE 88 Advertising & Promotion* does not provide a specific promotion prescription to guarantee healthy audience growth, but it should help promoters set realistic goals, target specific markets, and develop appropriate messages to make sure advertising and promotion dollars are spent wisely and effectively.

This report would not have been possible without the efforts of several individuals. First, a special thanks to David Giovannoni for initiating AUDIENCE 88, directing and overseeing the project, and guiding the AUDIENCE 88 team throughout the project. Second, to Tom Thomas and Terry Clifford for sharing their experience, knowledge, and insights. Third, to Ted Coltman and Ric Grefé at the Corporation for Public Broadcasting's Office of Policy Development & Planning for realizing AUDIENCE 88's potential and convincing CPB to invest in it. Finally, to all of the people who have shared their thoughts and concerns as the AUDIENCE 88 findings have been reported.

Linda K. Liebold

Annapolis, MD
July 1988

1.

INTRODUCTION

When it comes to advertising and promoting a public radio station, the focus is often on the *method*. How much can you spend? How should you spend it? Should you go with print ads or billboards? Do you want slick copy pushing national stars, or folksy pictures of staff? Should you try a concert or do a booth at a street fair?

Although the “how” of advertising and promotion is important, it works best when preceded by three other questions.

The first question is “why?” Why advertise and promote? What *objective* do you want to accomplish?

The second question is “what?” What behavior do you want to alter? What attitudes and beliefs do you want to change? What is the message you want to send?

The third question is “who?” Who is likely to respond the way you intended? Who will join your audience? Who will become a member? Who comprises the *target audience* for your message?

With these questions answered, you can evaluate the “how.” How do you craft the content and presentation of your message so it will be accepted by your target audience? How do you choose the proper vehicle to get your message to these people?

Together, these questions make up the practice of *effective targeting* — using the right vehicle to reach the right people with the right message. Effective targeting determines the success of any advertising and promotion effort. This isn’t a new concept among public broadcasters, but AUDIENCE 88’s in-depth examination of public radio’s listeners refines it significantly.

It begins with a basic understanding of public radio’s listeners — and non-listeners.

The Target

Public radio serves many people extraordinarily well. Each week, 2 percent of all Americans 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 a significant number of persons. Over the course of a week, 6 percent of all Americans will listen to at least one public station; 12 percent will listen over the course of a year.

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

Public radio is not unique in this way. Indeed, it’s the nature of all stations to attract certain *types* of individuals and to repel others. Even the most successful commercial stations reach only a portion of the listeners in their community. The average American has dozens of stations from which to choose, yet most will listen to fewer than three in a typical week.

It’s as if public radio were a magnet. It attracts certain types of people very strongly; on others it exerts only a weak or sporadic pull; most people it leaves unmoved. Some are even repulsed by it. The “magnetic” attraction of an audience to a station, or to a particular format or service on that station, is called *appeal*.

Let’s stop here for a minute, because this alone is very powerful information.

Eighty-eight percent of the U.S. population don’t listen to public radio because it doesn’t appeal to them; they like something else on radio better.

TERMS TO KNOW

To gain the most from this report, it is important to understand some basic terms defined below. For more specific information, see the AUDIENCE 88 Terms & Concepts report.

Demographics: Measures of *who listeners are*; age, gender, education, occupation, income, and other personally descriptive measures.

Geodemographics: Measures of *where listeners live*; their neighborhood type according to PRIZM or ClusterPlus definitions.

Psychographics: Measures of *what listeners think*; interests, opinions, values, attitudes, beliefs, lifestyles, personality traits, etc. Based on psychological, as distinguished from demographic, dimensions.

Lifestyles: Measures of *how listeners live*; broad measures include sophistication and venturesomeness; specific measures include purchasing habits, inclination to set or follow trends, and predisposition to try new products and services.

Values: Basic attitudes and beliefs.

PRIZM: A geodemographic approach to consumer market segmentation invented by Claritas, Washington, DC. All U.S. neighborhoods are classified into 40 neighborhood types according to their similarities over precise census measures.

ClusterPlus: A geodemographic approach to consumer market segmentation developed by Donnelley Marketing Information Services, Stamford, CT. All U.S. neighborhoods are classified into 47 neighborhood types according to their similarities over precise census measures.

Reach: The total number of people who hear or see an advertising message.

Frequency: The number of times an advertiser reaches the same person with the same message.

Advertising: A *paid* form of mass communication designed to promote a product or service.

Promotion: Materials, techniques, or activities designed to help “make the sale” of a product or service, exclusive of paid advertising.

Positioning: Setting a product or service meaningfully apart from its competition by stressing its uniqueness in order to attract the target audience.

VALS (Values and Lifestyles): Developed by Stanford Research Institute, Menlo Park, CA, VALS segments persons into nine distinct types reflecting basic attitudes and beliefs.

Inner-Directed: A VALS term describing people who conduct their lives in accord with inner values (the needs and desires private to the individual) rather than in accord with the values of others.

Outer-Directed: A VALS term describing people who conduct their lives in response to external signals. Consumption, activities, and attitudes are all guided by what the Outer-Directed individual thinks others will think.

Societally Conscious: The Inner-Directed VALS type most associated with public radio. Forty-two percent of public radio listeners are Societally Conscious. They have a profound sense of societal responsibility. Their concerns extend beyond themselves and others to society as a whole.

Achievers: One of the Outer-Directed VALS types. Twenty-six percent of public radio listeners are Achievers. They are competent, self-reliant, hard-working, and oriented to fame and success. They are affluent people who influence the system.

Can you imagine someone preferring Madonna to Mozart? Or Paul Harvey to Garrison Keillor? Or big band to progressive jazz? Of course you can. Maybe you're one of them. The fact is, public radio isn't everybody's cup of tea. No amount of advertising or promotion will change people's tastes or persuade them to listen to something they don't want to hear — at least, not for very long.

Short of totally altering the appeal of your station's programming, there is nothing you can do to make these people listeners or members. They are not your target audience. Instead, your target audience is the 12 percent of the population interested, to some degree or another, in what your station airs.

But not everyone in the 12 percent is in your target, either. Whom you target your advertising or promotion to depends on your objective.

Objective: Hastening the Next Tune-In

For instance, advertising and promotion can hasten the next tune-in of a very select group of people. People in this target are those who do not listen frequently enough to be effectively influenced by on-air messages, but who do listen on occasion, because public radio appeals to them in some way for some reason. This segment of occasional listeners constitutes around 6 percent of the U.S. population.

This 6 percent figure may vary from market to market, but the idea of a target group defined in this way holds very true for all stations in all markets. It is arrived at by this reasoning. If 12 percent of the population listens to public radio over the course of a year, and 6 percent listens each week, then the remaining 6 percent listens occasionally, and can take as long as a year to tune in.

Admittedly, it is hard to limit one's effort to reaching only 6 percent of the U.S. population, but why try to spend precious advertising and promotion dollars on the people who don't have the slightest inclination to listen? No amount of advertising or promotion will persuade them to listen to something they don't want to hear.

Instead, dollars should be spent on a targeted effort to affect the listeners to whom you *do* have something to offer. These *occasional listeners* are already inclined to listen, albeit not that often. Accelerating their next tune-in is the first step toward making them more frequent listeners. They already know who you are, and something of what you do; they simply need to be reminded that your station is still there, as good as ever.

Just as there are many premium beers to choose from, there are many radio stations to choose from. Hastening the next tune-in is very much like persuading someone to choose a Heineken over another beer. "I could have had a Heineken" translates to "I could have listened to *Morning Edition*." Coming up with the right *positioning* and the right *message* directed at the right *people* is the key to effective advertising and promotion.

Objective: Turning Listeners into Members

Advertising and promotion can also be used to turn listeners into members. Again, one must ask, "*Who* are the people (the target audience) I want to effect? *What action* do I want them to take? *What message or event* will encourage them to take this action?"

One strategy to turn listeners into members is to strengthen listeners' ties with the station — to "cement the bond." Your advertising, promotional event, or direct mail might encourage listeners to feel like a *member* of a public radio "family"; your message may be that public radio is for *them* and that it needs *their* support.

Concerts are an excellent example of a promotional event that would draw such listeners. An advertisement carried by a local or regional magazine with a demographic profile similar to public radio would reach the target group.

And don't forget the power of your own air. A message along the lines of "The smart people who listen to *Morning Edition* know that information of this caliber takes an extra effort" would reinforce listener values and sense of belonging.

THE AUDIENCE 88 DATABASE

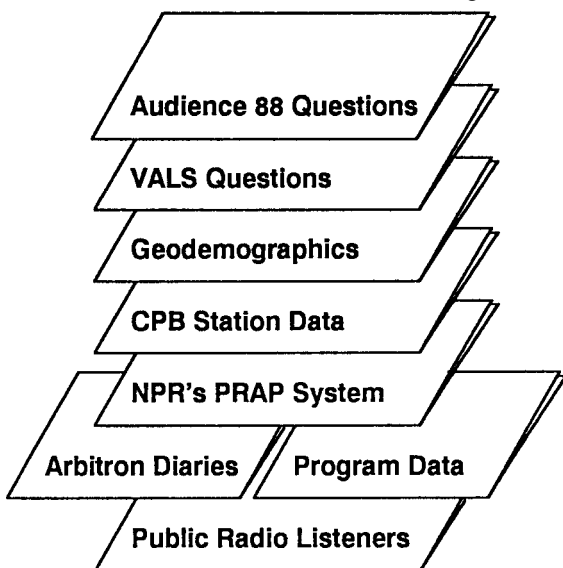
USING THE NUMBERS

Because AUDIENCE 88 is a national study, station personnel will want to use care in applying its results to their 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 the 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 almost 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 reach 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 multiyear 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 *segmentation schemes* divides 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 households 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.

How Can AUDIENCE 88 Work For You?

Objective. Target audience. Vehicle. Message. These are the bases for all advertising and promotion. AUDIENCE 88 will help you set realistic objectives, target appropriate audiences, select appropriate vehicles, and develop effective and efficient advertising and promotion campaigns. Very simply, AUDIENCE 88 will help you answer these questions:

Who? AUDIENCE 88 identifies public radio listeners in rich detail — their demographics, lifestyles, needs, wants, and ambitions. It also distinguishes the differences between listeners of one format or program from listeners of another.

Where? AUDIENCE 88 identifies the types of neighborhoods public radio listeners live in and (if you obtain local market data) their exact ZIP codes.

What? AUDIENCE 88 helps you develop positioning clearly directed at your target audience's values, lifestyles, needs, and wants. It suggests the appropriate words, phrases, tone of voice, and graphics that reflect the characteristics of your target audience.

It will also help you select promotion items, giveaways, and premiums that reflect the values and lifestyles of your target audience. It will help you develop station promotional events and materials that match target audience profiles.

How? AUDIENCE 88 will help you make media-buying decisions based on the lifestyles and media habits of your listeners. It will also help you pinpoint prospective listener neighborhood types for direct mail campaigns.

AUDIENCE 88 identifies target audiences most effectively reached through media other than your station. It shows who these people are, where they live, what they do, and how they think. It suggests what behaviors can be changed, and what message might do it. It shows that advertising and promotion can play very specific and important roles.

In summary, AUDIENCE 88 will help you make wiser advertising and promotion decisions. It will make your efforts more effective and efficient — and in turn, more successful.

Where Should You Begin?

Before embarking on an advertising and promotion campaign, ask yourself, "Is my product of such quality that it is worthy of advertising and promotion?"

When you advertise and promote, you are "selling" your "product," which is your programming. Advertising may *convince a prospect to try your station one more time*; from then on, it's up to the product to make the prospect a regular user.

If your programming is in need of repair, you should not invest in advertising and promotion. Advertising a bad product is worse than not advertising at all.

Provided your programming is of good quality, proper advertising and promotion can help achieve specific objectives among specific groups of people.

AUDIENCE DIVERSITY

Most public broadcasters aspire to provide programming to a wide variety of listeners. AUDIENCE 88's emphasis on a few listener traits (such as age, education, and VALS characteristics) has raised some concern that public radio listeners are a homogeneous group. This concern prompts us to review the study's data and to remind ourselves that, for all they have in common, public radio listeners are still a diverse group of individuals.

As a group, public radio's audience is remarkable for its level of educational attainment. But this does not mean that *all* listeners are well educated. While 85 percent of the weekly audience have attended at least one year of college, 15 percent have not; indeed, 3 percent have not graduated from high school. These are not children; AUDIENCE 88 studies only listeners 18 years old or older.

Similarly, while nine in ten (91%) of AUDIENCE 88 respondents are white, 6 percent are black, 2 percent are Asian, and 1 percent is Hispanic. Public radio's audience is split almost evenly between men and women.

Listeners also show great diversity in the ways they describe themselves. For instance, half (52%) of the individuals in the weekly cume consider themselves middle class; 36 percent say they are upper-middle or upper class; and 12 percent think of themselves as lower or lower-middle class.

Politically, almost half (46%) of the individuals in the weekly cume consider themselves liberal; 26 percent think of themselves as "middle of the road"; and 28 percent say they are conservative.

Listeners who share a common characteristic can be quite diverse in a variety of others. This fact makes it crucial for the reader to distinguish between AUDIENCE 88's segmentation analysis — which by its nature focuses on the similarities of listeners — and stereotypes and cliches. The affluent listener may be black or white; the educated listener may be liberal or conservative; the Societally Conscious art lover may never have gone to college.

2.

PROFILE OF THE PUBLIC RADIO AUDIENCE

The essence of effective targeting is to get the right message to the right people. These people — your target — will be very similar to those now using public radio.

Targeting

Effective targeting is the key to any successful advertising and promotion campaign. A target may be composed of a diverse group of people, but these people share certain dominant characteristics that can be described by demographics (who people are), geodemographics (where people live), and psychographics (how people think). Efficient targeting requires taking advantage of these dominant characteristics.

For example, over half (52%) of public radio's audience live in 4 of PRIZM's 12 neighborhood groups. People in these 4 groups are dominant; they — or people like them — are apt to be the focus of a direct mail campaign. Without this kind of geodemographic information, a campaign would likely be more expensive and less efficient.

Similarly, 42 percent of public radio's listeners are Societally Conscious. These people have a profound sense of social responsibility and care deeply about environmental and consumer issues. Knowing that they compose the largest single group of listeners, which promotional event would be most successful — a series of lectures on organic gardening or a dirt bike rally?

In short, knowing the dominant audience characteristics as described by AUDIENCE 88's segmentation schemes will help you design highly targeted advertising and promotion campaigns. This knowledge will help you aim your message at the neighborhoods where people in your target live. It will

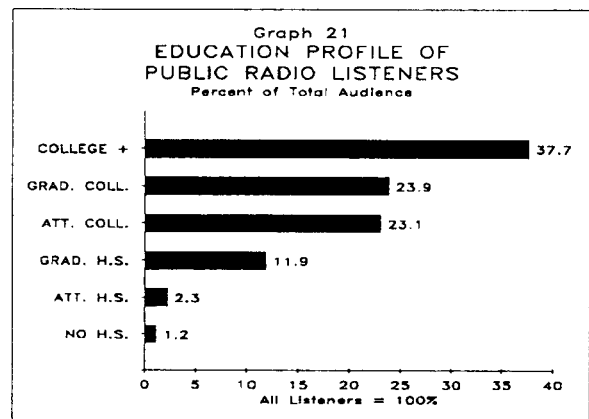
help you develop copy and graphics to which your target can relate. It will suggest successful promotional activities that your target will enjoy.

The characteristics of public radio's listeners are described on the next few pages. Watch for the *dominant* characteristics readily apparent from the graphs. Keep them in mind when choosing targets for your next advertising and promotion campaign.

Education

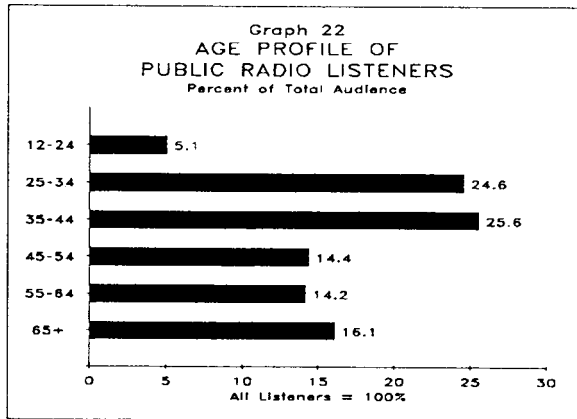
Education is the major characteristic that distinguishes public radio listeners from other Americans.

Nearly two-thirds (62%) of public radio listeners have college degrees. And, while fewer than six percent of all Americans listen to public radio in a week, one-third (33%) of those who have pursued an education beyond college use the service each week.



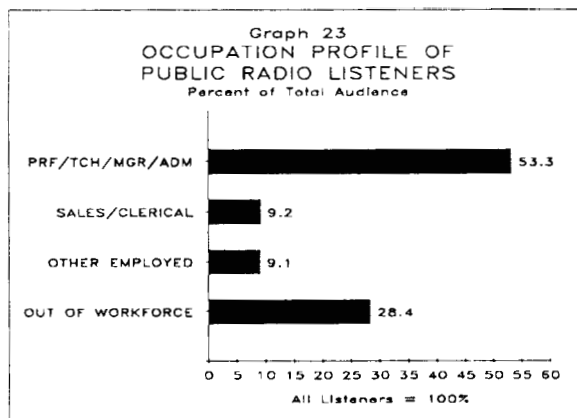
Age and Gender

Public radio's listeners are highly concentrated in the 25- to 44-year-old range, with half of the audience falling in this age bracket. Overall, men are slightly more likely (55%) than women (45%) to listen to public radio. (The AUDIENCE 88 sample includes only those persons 18 years of age and older.)



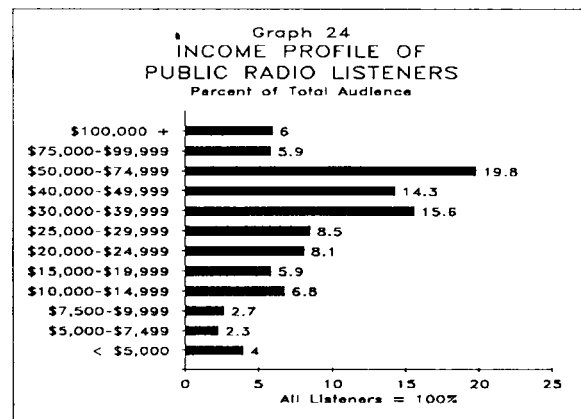
Occupation

Over half of public radio listeners have white-collar jobs. Although one in four (28%) public radio listeners is not in the work force — students, mothers with children at home, and retirees, for example — 53 percent are employed in professional, technical, managerial, or administrative positions.



Income

With such well-paying white-collar careers, it comes as no surprise that most public radio listeners are financially well-off. There is a six in ten (62%) chance that public radio listeners live in households with annual incomes greater than \$30,000. In fact, one in eight (12%) public radio listeners lives in a household with an income of \$75,000 or more. And, half (49%) of all persons in the United States living in these high-income (\$75,000+) households listen to public radio each week.



Geodemographics

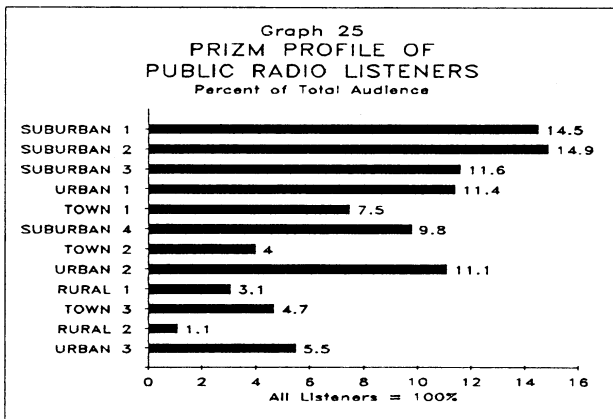
Imagine the kinds of neighborhoods in which public radio listeners reside. Most live in neighborhoods where other well-educated, professional, and affluent people reside. If you refer to AUDIENCE 88 *Terms & Concepts* you will see how geodemographic systems of PRIZM and ClusterPlus divide America into *types* of neighborhoods.

PRIZM and ClusterPlus are similar geodemographic tools. Both are based on the sociological principle that people with similar cultural backgrounds, circumstances, and perspectives cluster in localities suited to their lifestyles. They adopt similar social values, tastes, and expectations. They exhibit shared patterns of consumer behavior toward products, services, media, and promotions. Such behavior is fundamental, predictable, and targetable, and therefore extremely valuable in advertising and promotion decision making. (For specific PRIZM and ClusterPlus data, see appendix A.)

PRIZM

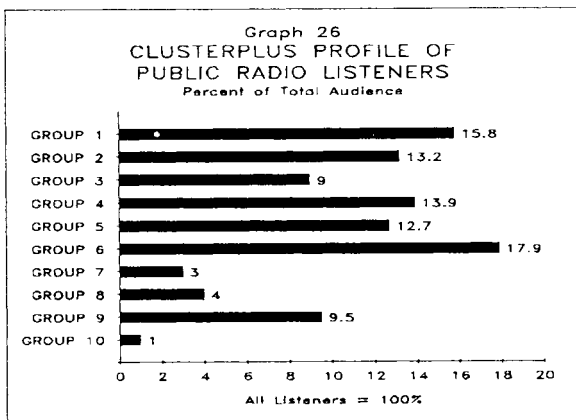
The PRIZM system groups people into 40 clusters, themselves assembled into 12 major groups. (A detailed description of each cluster can be found in the AUDIENCE 88 *Terms & Concepts* report.)

A large percentage (41%) of public radio listeners live in PRIZM’s affluent suburban (S1, S2, and S3) neighborhoods. In fact, public radio listeners are more than twice as likely as other Americans to live in upscale suburbia. Another 11 percent live in upscale urban (U1) areas.



ClusterPlus

ClusterPlus, like PRIZM, is based on geodemographic principles. But unlike PRIZM, it groups people into 47 clusters, themselves assembled into 10 major groups.



Sixteen percent of public radio listeners reside in exclusive Group 1 neighborhoods — about twice the percentage of the total U.S. population. Another 13 percent live in Group 2 neighborhoods, described as upscale urban neighborhoods. And another 9 percent live in Group 3 neighborhoods, where younger, mobile, upscale families reside.

As you can see, PRIZM and ClusterPlus correlate nicely. Although these data are based on a national sample, PRIZM and ClusterPlus data are available for individual markets. For more information on how to obtain geodemographic data for your market, call the Radio Research Consortium, 301/774-6686.

Values and Lifestyles (VALS)

VALS views people from the perspective of developmental psychology. The hierarchical VALS model holds that development begins from a *Need-Driven* state, progresses through *Outer-* and *Inner-Directed* phases, and culminates in an *Integrated* state, a joining of *Outer-* and *Inner-Direction*. The VALS “tulip” (page 10) illustrates this progression.

The VALS system groups people into nine lifestyles clustered into four major categories (Need-Driven, Outer-Directed, Inner-Directed, and Integrated). As mentioned earlier, many public radio listeners are well educated and therefore have good incomes and good jobs. But not all educated people are alike. VALS helps to distinguish them. (Please refer to AUDIENCE 88 *Terms & Concepts* for more details.)

On the one hand, the educated listeners who are Inner-Directed conduct their lives in accord with their inner values. They are concerned with inner growth. Listeners who are Inner-Directed tend to be the *Societally Conscious* and *Experientials*.

On the other hand, those educated listeners who are Outer-Directed live their lives in response to external signals. They are guided by what others will think. Public radio listeners who are Outer-Directed tend to be *Achievers*.

Societally Conscious

The Inner-Directed Societally Conscious make up the largest group of public radio listeners. *Forty-two percent of public radio's listeners are Societally Conscious* compared to 12 percent of Americans.

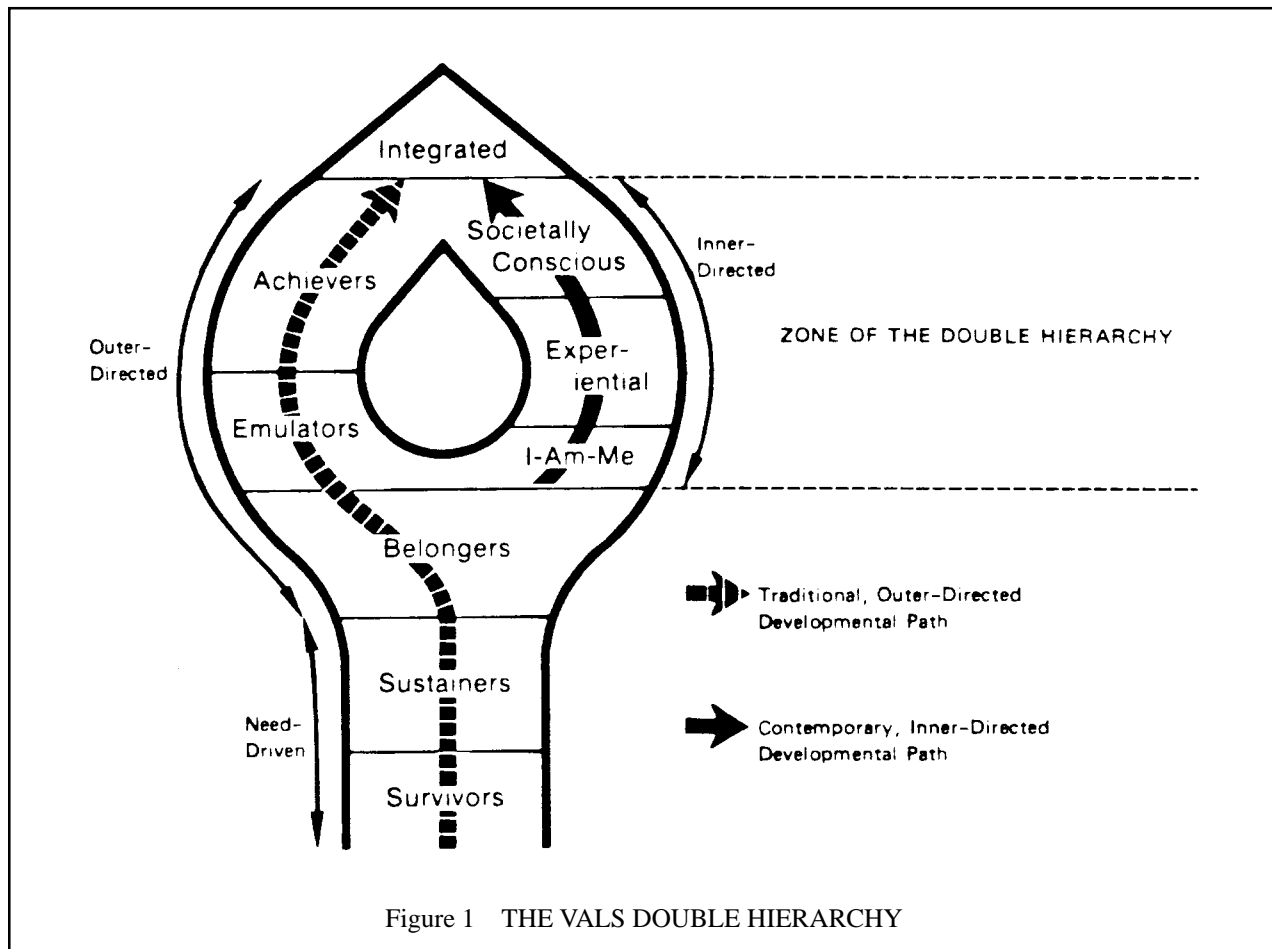
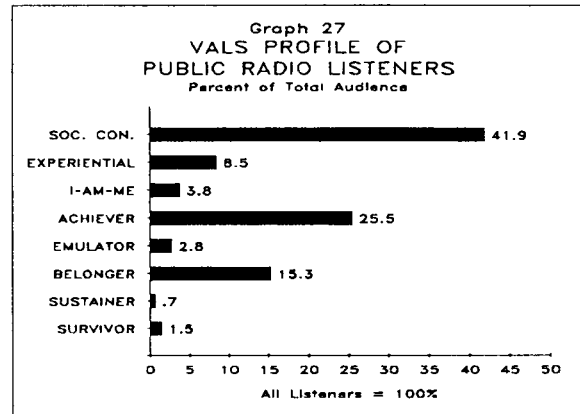
The Societally Conscious tend to have a profound sense of social responsibility and support such causes as environmentalism and consumerism. They may be activists who are impassioned and knowledgeable about the world around them. They may be attracted to simple living.

Being Societally Conscious, they probably participate in the arts and attend cultural events. Most travel often, enjoy outdoor sports and activities such as cycling, jogging, swimming, boating, and camping. Many enjoy intellectual games such as Chess and Backgammon. They are also apt to read a lot.

Concerned with energy conservation, they most

likely own subcompact vehicles. They probably enjoy the finer things in life and are often the first to purchase sophisticated electronic equipment.

Societally Conscious listeners may not watch much TV, but when they do, it's often public television. They also spend less time than others listening to radio, but when they do, it's often public radio.



Achievers

One in five (21%) Americans is an Achiever; yet *one in four (26%) public radio listeners is an Achiever*. Unlike public radio's Inner-Directed Societally Conscious listeners, its Outer-Directed Achievers conduct their lives in response to external signals. Consumption, activities, and attitudes are all guided by what Achievers think others will think. Achievers and other Outer-Directeds tend to be the happiest Americans, being well attuned to the cultural mainstream — indeed, exerting a strong influence on it.

Achievers are competent, self-reliant, and efficient. They tend to be materialistic; hard working; and oriented to fame, success, and comfort. As one might expect, Achievers include many leaders in business, the professions, and government. Achievers are affluent and an integral part of the economic system. As such, they are the defenders of the economic status quo.

Achievers are among the best adjusted of Americans, being well satisfied with their place in the system. They tend to enjoy some of the same activities as the Societally Conscious and have similar buying patterns. But, unlike the Societally

Conscious, they are not very interested in the arts, nor do they find much time to attend cultural events. They also spend less time listening to public radio.

Summary

The insights into values and lifestyles provided by VALS combine with demographic data to provide a much richer profile of the public radio listener than ever before available.

For instance, we've known for years that public radio's audience is well educated, but now we also know that there are at least two types of well-educated listeners: Societally Conscious persons and Achievers.

VALS also adds depth to the geodemographic schemes of PRIZM and ClusterPlus. A majority of Achievers tend to favor life in the suburbs, while 50 percent of the Societally Conscious prefer small towns and rural areas, and another 25 percent live in large central cities.

The following section shows how this understanding of public radio's listeners can be directly applied to your advertising and promotion efforts.

3.

APPLICATIONS: FIVE CASE STUDIES

This section demonstrates how AUDIENCE 88 can assist stations in reaching audience-building goals and objectives through targeted advertising and promotion.

Your product is programming. And you believe it's *good* programming. So what is your overall goal?

AUDIENCE 88 suggests the most realistic advertising and promotion goal public radio stations can expect to achieve is to *hasten the next tune-in* of occasional listeners.

To help you understand how AUDIENCE 88 can work for you, five case studies are presented on the next few pages. Each begins with an objective and is followed by a description of the target audience, suggested positioning, copywriting, graphics, and media strategies based on AUDIENCE 88 data.

TERMS TO KNOW — A REVIEW

Demographics: Measures of *who listeners are*; age, gender, education, occupation, income, and other personally descriptive measures.

Geodemographics: Measures of *where listeners live*; their neighborhood type according to PRIZM or ClusterPlus definitions.

Psychographics: Measures of *what listeners think*; interests, opinions, values, attitudes, beliefs, lifestyles, personality traits, etc. Based on psychological, as distinguished from demographic, dimensions.

Advertising: A *paid* form of mass communication designed to promote a product or service.

Promotion: Materials, techniques, or activities designed to help “make the sale” of a product or service, exclusive of paid advertising.

Positioning: Setting a product or service meaningfully apart from its competition by stressing its uniqueness in order to attract the target audience.

CASE #1

Objective: Increase tune-in by occasional listeners.

Situation

A major-market public radio station wants to increase tune-in by occasional listeners. The station's programming is primarily jazz, with some news and information like *All Things Considered* and *Morning Edition*.

Target Audience

According to AUDIENCE 88 data, men are a little more likely than women to listen to jazz on public radio; and the audience is likely to be 25 to 34 years of age. Many live in upscale urban and suburban areas, and many are single, college graduates, Societally Conscious, and Achievers. Half hold management positions, but a quarter hold sales and clerical positions. Over half have household incomes between \$25,000 and \$75,000.

Because of limited resources, the station decides to narrow the audience by targeting *urban* Societally Conscious and Achiever *males*, aged 25 to 34, with annual household incomes of \$25,000 to \$75,000.

Positioning/Message Direction

After reviewing the demographics, psychographics, and geodemographics of listeners to jazz on public radio, the station decides the following:

- Ads will appeal to the listener's desire to be "hip," yet acknowledge their growing sophistication.
- Copy and graphics will be light and upbeat; colors will be vibrant.
- A sense of "fun" and "entertainment" will be created.
- Words such as *popular*, *worldly*, *sophisticated*, *fun*, *status*, *upbeat*, *on the rise*, and *cool* will be used.

*Media Direction*¹

Public Radio. First, the station will use its own air to reach the target audience. It will cross-promote jazz with information programming since the audience appeal is similar.

Transit. Since a large percentage of the station's jazz listeners live and work downtown, the following transit vehicles will provide good exposure for the station's message:

- Subway car cards
- Subway platform ads
- Bus cards, interior and exterior
- Bus stop posters

Magazines. The Societally Conscious and Achievers are heavy readers of magazines and newspapers. The station decides to use the major *city magazine* plus entertainment-oriented publications geared toward a younger audience (25 to 34 years of age).

Newspapers. Arts and Entertainment or Style sections and the National Sunday Magazine will be used. Since the Societally Conscious and Achievers enjoy the Business and Financial sections of the newspaper, the station may try these sections, too.

Direct Mail. By obtaining local market PRIZM data, the station will target young urban males by mailing to Urban 1 clusters including *Urban Gold Coast*, *Bohemian Mix*, and *Black Enterprise* neighborhoods. (See AUDIENCE 88 *Terms & Concepts* report.)

¹ AUDIENCE 88 describes the characteristics of listeners to certain formats and programs in great detail. For the sake of your campaign's effectiveness, as well as for its efficiency of reach, you will usually target your advertising and promotion efforts at the dominant demographic, geodemographic, or psychographic group(s); you may, however, choose to target less dominant groups. AUDIENCE 88 also informs these decisions.

CASE #2

Objective: Introduce a new program and encourage trial by regular and occasional listeners.

Situation

Based on the success of the program in other markets, this mid-sized public radio station has decided to introduce *Weekend Edition* into its programming schedule. The station wants to encourage regular and occasional listeners to tune in the program.

Target Audience

AUDIENCE 88 data reveal that listeners of *Weekend Edition* are adults 25 to 44 years of age, with a slight skew toward women. They are professionals and managers, and many live in affluent suburban neighborhoods. With over half being Societally Conscious, news and information is important. They want to be in touch with what's happening in the world. In keeping with the national audience profile, the station chooses to target 25- to 44-year-old Societally Conscious women who live in affluent suburbia.

Positioning/Message Direction

Based on AUDIENCE 88 data, the station decides the following:

- Ads will be informational and intellectual. They will appeal to a "hunger for news."
- They will appear upscale, clean, straightforward, and direct.
- They will be thought-provoking and use words such as *intelligent, informative, aware, responsible, and quality*.
- Rich, upscale graphics and clear, clean, crisp black and white or solid colors will be used.

Media Direction

The following will be considered:

Public Radio. The station will cross-promote with other information programs, especially with *Morning Edition*, since its listeners rely on morning news and information and may be able to be "turned on" to weekend information programming. The station will also cross-promote with classical music, since the appeal of both formats is similar.

Newspaper. Ads in the Business, Financial, and Main News sections will introduce the new program.

Magazines. Local business publications and local or regional editions of national news magazines (*Time, Newsweek, U.S. News, Business Week, etc.*) will be selected according to reach and cost per thousand. Epicurean and Home magazines will also be considered.

Public Television. The station will promote *Weekend Edition* around news and information programming, and other programming that appeals to Societally Conscious women age 25 to 44, broadcast on the local public television station.

Commercial Television. The station will trade commercial air time for underwriting credits and will run ads around morning news and information programming. Other commercial programs will be studied to determine the ones that might appeal to the target audience.

Cable Television. The station will trade cable air time for underwriting credits on the Cable News Network (CNN). As with commercial television, other cable networks and programs will be carefully analyzed.

CASE #3

Objective: Increase tune-in to classical music by regular and occasional listeners to public radio information programming.

Situation

This small-market station is perceived by many as heavily information-oriented, too serious and intellectual, and for news junkies only. The station wants to increase tune-in of its classical music programming by repositioning its image.

Target Audience

The station decides to target adults aged 25 to 44. They are well educated, with annual household incomes of \$50,000 or more, and hold professional, technical, managerial, and administrative positions. They live in small towns and rural areas and are primarily Societally Conscious.

Positioning/Message Direction

After studying the demographics, psychographics, and geodemographics of public radio classical music listeners, the station decides the following:

- To acknowledge the audience's intellect, but appeal to their emotions.
- An "artsy," aesthetic approach will help counter the station's "serious" image.
- Images and words will convey the sense of artistic understanding and appreciation.
- Graphics will be clean, but somewhat softer than would be used for the promotion of information programming.

- As for color, black and white with screens (gray) should be used and/or a mix of bold, rich colors and more subtle hues.
- Words such as: *classic, worldly, excellence, perfection, beautiful, and vintage* will be used.

Media Direction

Considering the profile of the target audience, the station makes the following media choices:

Public Radio. The station will cross-promote with information programs to create awareness among "news junkies" of the station's classical music offerings.

Outdoor. Billboards will be placed near or en route to the business district and commercial centers. Boards also will be placed closer to home, in rural and residential areas.

Newspapers. Ads will be placed in the Arts, Entertainment, Style, and Home sections of the newspaper. Because the Societally Conscious and Achievers also tend to read the Business and Financial sections of the newspaper, these sections will also be considered.

Magazines. Ads will be placed in theater and concert programs as well as in selected entertainment magazines.

Direct mail. A direct mail package will be sent to PRIZM's Group T1 Cluster -- educated, young, mobile families in "exurban" satellites and small towns (*God's Country, New Homesteaders, and Towns and Gowns*).

Public Television. The station will place on-air promotions around public television music and entertainment programming that appeals to the Societally Conscious, 25 to 44 years of age.

CASE #4

Objective: Introduce an existing program or format to a new audience segment.

Situation

This station primarily broadcasts classical music, and its image is of a station designed for older, rich intellectuals and musicologists. The station recently instituted some programming changes that it believes will heighten its appeal to younger listeners. The station wants to introduce itself to and increase trial by a younger audience, perhaps not quite so rich and certainly not composed of classical music connoisseurs.

Target Audience

The target audience consists of men and women age 25 to 44 who are well-educated, have household incomes of \$40,000 or more, and live in upscale suburban neighborhoods. Although over half of the station's audience consists of the Societally Conscious the station decides to direct its campaign primarily to Achievers, since there are far more Achievers residing in the station's market area than there are Societally Conscious persons. (VALS reports that 21 percent of the U.S. population are Achievers, as opposed to 12 percent who are Societally Conscious.)

Positioning/Message Direction

After studying AUDIENCE 88 data of listeners to classical music, the station decides the following:

- Ads will focus on it being “trendy” to listen to classical music.
- Ads will play on the Achiever's competitive nature.

- Positioning will convey that “anyone who is anyone” is familiar with and listens to classical music. After all, as an Achiever, one should be culturally aware, shouldn't one?
- Ads will be “upscale” with rich colors and graphics.
- Symbols of the Achiever's lifestyle (luxury items) may be used.
- A challenge may be presented. (Achievers love a challenge.) “Shouldn't *you* be listening to classical music?”
- Examples of famous people (rich, successful, Achiever idols) who listen to classical music may be used. Achievers don't like to be upstaged!
- Testimonials will be considered, since they can be very effective with Outer-Directed Achievers.

Media Direction

The station makes the following media decisions based on the profile of its target audience:

Public Radio. To attract Achievers to a new format, the station will cross-promote classical music with its information programming.

Magazines. Business and Financial magazines, known to be read by Achievers, will be used. News and Sports magazines will also be considered.

Newspapers. Business, Financial, and Sports sections of the newspaper will be selected.

Direct Mail. The station will obtain ClusterPlus data on its market and mail to Group 3 homes (younger, mobile, upscale families).

CASE #5

Objective: Strengthen the bond between listeners and the station.

Situation

A public radio station decides to hold a special event in order to increase membership income by strengthening the bond between listeners and the station. The station's programming is jazz.

Target Audience

According to AUDIENCE 88 data, slightly more men than women listen to jazz on public radio and tend to be 25 to 34 years of age. Many are single, college graduates, and live in upscale urban and suburban areas. The Societally Conscious and Experientials make up close to half of the listening audience.

The station decides to target single, well-educated Societally Conscious persons and Experientials, aged 25 to 34, who live in upscale urban neighborhoods.

The station believes that a summer jazz fest at the city park will draw a large number of jazz listeners.

Positioning/Message Direction

Because the target audience is young and single, the station positions the promotion event as a way for people to enjoy listening to top local jazz bands and a way to meet other single people.

- Playing on the audience's experimental nature and "singleness," ads and promotion materials will focus on the excitement and experiences/opportunities awaiting them at the jazz fest.
- Advertising and promotion materials will be upbeat, lively, colorful, and exciting.
- Copy will be minimal, and graphics will be bold.

Media Direction

The station makes the following media decisions based on the target audience:

Public Radio. The best way for the station to reach its listeners is by promoting the event on its own air. Announcers will be upbeat and excited about the event and relay that energy to the audience. They will stress the fact that the jazz fest will be held outdoors (Societally Conscious persons and Experientials enjoy nature), and that it will be an excellent and fun way to meet new people.

Newspapers. Ads will be placed in the local urban neighborhood newspapers that tend to be read by 25- to 34-year-old Societally Conscious persons and Experientials.

Ads will also be placed in the Weekend Entertainment section of the daily newspaper.

Direct Mail. The station will mail postcards promoting the event to its members who reside in neighborhoods where young Societally Conscious persons and Experientials live.

Promotion. The station will place posters in local record stores and hang banners promoting the event (and the station) on light posts along the main street adjacent to the park where the event will be held.

Summary

These case studies were examples of how AUDIENCE 88 can be employed to help you make more effective and efficient advertising and promotion decisions. The following section reviews public radio audience demographics and geodemographics, gives more detail on listeners' values and lifestyles, and provides suggested advertising and promotion message and media strategies.

4.

PUTTING AUDIENCE 88 TO WORK FOR YOU

AUDIENCE 88 can make your advertising and promotion decisions more effective and efficient, from developing your strategy to positioning, copywriting, design, and media planning. The focus of this section is on developing your advertising/promotion message and choosing appropriate media.

A Quick Review

Your advertising and promotion strategy should take the following audience characteristics into consideration:

- Most public radio listeners are 25 to 44 years of age.
- Close to two-thirds (62%) of public radio listeners have college degrees.
- Most public radio listeners have white-collar jobs.
- Six in ten (62%) have household incomes of \$30,000 or more.
- A large percentage of listeners (41 percent according to PRIZM) live in upscale suburban neighborhoods, and another 23 percent live in mid-to-upscale urban neighborhoods.
- Forty-two percent of public radio listeners are Societally Conscious and 26 percent are Achievers.

Because public radio listeners are well educated, upscale professionals and managers, positioning, copy, and graphics should be developed with high sensitivity to their lifestyles. Your message should be tailored to these groups, but *not* to the exclusion of any others.

VALS data, in particular, are useful in developing your advertising and promotion strategies. The attitudes, activities, and consumption patterns of the Societally Conscious and Achievers are described on page 20.

The Message

When developing advertising and promotion copy for the *Societally Conscious*, you should use words such as these:

natural, historic, technical, artistic, aesthetic, cultural, exotic, masterpiece, imaginative, creative, experimental, liberal

For *Achievers* you should use words and phrases such as these:

excellence, the best, standard of value, successful, decisive, incisive, determined, goal-oriented, logical, practical, conservative

Because public radio broadly appeals to the affluent, well-educated, sophisticated consumer, represented by both the Societally Conscious and Achievers, these two VALS groups may appropriately be combined. In such instances, your promotion should endeavor to not offend either VALS group, but to attract both.

CHARACTERISTICS OF PROMINENT VALS TYPES

SOCIETALLY CONSCIOUS



Attitudes

- Socially responsible
- Interested in the arts and aesthetics

Activities

- Swimming
- Sailing
- Attending cultural events
- Traveling for business and pleasure

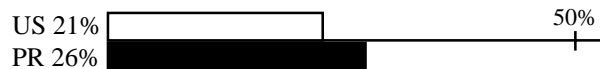
Consumption

- Small cars
- Tennis equipment
- Business and pleasure travel
- Ethnic and natural foods
- Backpacking and hiking equipment
- Photographic equipment

How the Societally Conscious See Themselves

- Share importance of “accomplishments” with Achievers
- Consider growth important: creative, informative, experimental
- Consider professional success important
- Do things to stretch the mind, achieve peace of mind, and have close friends
- Are largely intellectual and artistic
- Consider most cherished possessions: favorite books, antique furniture, art objects
- Tend to believe in liberalism, idealism, and conservatism

ACHIEVERS



Attitudes

- Decisive, direct, driving, and competitive
- Goal-oriented; seeking fame, power, and material success

Activities

- Golf
- Spectator sports
- Eating out
- Business and pleasure travel

Consumption

- Luxury automobiles
- Hi-tech products
- Recreational equipment
- Frozen vegetables and entrees
- Golf equipment
- High margin gift items

How Achievers See Themselves

- Seem relatively calm, in control, and happy
- Are self-confident and self-reliant
- Are logical, aggressive, and practical
- Tend to be planners and like to accomplish a lot
- Are “thinking” people, solid and coherent
- Are leaders, equipped with intellectual and emotional tools required for success
- Consider most cherished possessions: home, things children made, family photos, garden; secondarily: art objects and antique furniture
- Believe success is important

Bar marked US is the percent of the United States population; PR is the percent of public radio’s audience.

Words and phrases listed below should appeal to both groups:

accomplished, something different, something special, timeless in design, flawless in execution, unmatched in quality, authentic, quality, attention to detail, responsible, aware, worldly, conscientious, classic, important, prestigious, intelligent, integrity, informed, impressive, educational, informative, vintage, distinguished, distinctive, inspirational, successful, particular, insightful, classy

Images and Graphics

The images and graphics you develop should likewise reflect the attitudes and lifestyles of public radio listeners. Use rich colors and/or striking contrasts. Use meaningful, thought-provoking graphics that reflect the lifestyle of the public radio listener (famous people and places, symbolic images, sharp, and classy graphics).

Three advertisements that reflect the kind of language and graphics that should appeal to Societally Conscious persons and Achievers alike appear on the following two pages.

Table 41. Affinities Among Formats and Programs. This table symbolically displays the degree to which a pair of formats or programs is compatible, or the degree to which they share “affinity.”

	<u>ATC</u>	<u>Classical</u>	<u>Drama</u>	<u>Info</u>	<u>Jazz</u>	<u>Kids</u>	<u>ME</u>	<u>Opera</u>	<u>PHC</u>	<u>Target</u>
All Things Considered		☺	☺		☺	☹	☺	☹	☺	☹
Classical	☺		☺	☺	☺	☹	☺	☹	☺	☹
Drama	☺	☺		☺	☺	☹	☺	☹	☺	☹
Information		☺	☺		☺	☹		☹	☺	☹
Jazz	☺	☺	☺	☺		☹	☺	☹	☺	☹
Kids	☹	☹	☹	☹	☹		☹	☹	☹	☹
Morning Edition	☺	☺	☺		☺	☹		☹	☺	☹
Opera	☹	☹	☹	☹	☹	☹	☹		☹	☹
Prairie Home Companion	☺	☺	☺	☺	☺	☹	☺	☹		☹
Targeted Programming	☹	☹	☹	☹	☹	☹	☹	☹	☹	

KEY:	☺	Strong Affinity	Operative affinity score greater than .910.
	☺	Moderate Affinity	Operative affinity score between .850 and .910.
	☺	Weak Affinity	Operative affinity score between .500 and .849.
	☹	No Affinity	Operative affinity score between .000 and .499.
	☹	Aversion	Operative affinity score below .000.

SAMPLE ADVERTISEMENTS

INTEGRITY.

There's something different about this kind of radio. **Morning Edition** listeners call it quality. Balanced reporting, attention to detail, and respect for the listener . . . you can hear the difference.

Morning Edition

5:30-9:00 am Central, Weekdays



Integrity: This ad demonstrates the use of crisp, clean, and effective copy. Notice how simple, but eye-catching the Prairie Public Radio headline is. "Integrity" appeals to the Societally Conscious and Achievers, alike. "Something different," "quality," "attention to detail" and "respect" all speak up to the audience and work well with public radio information listeners.

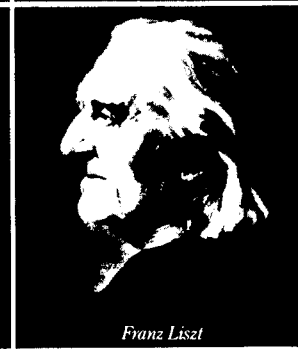
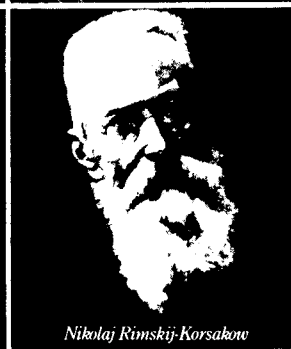
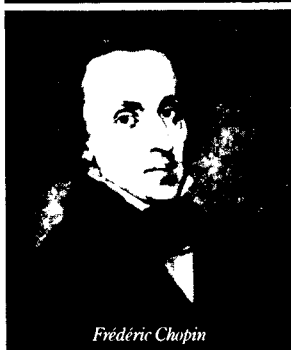
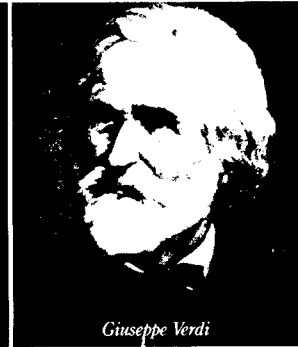
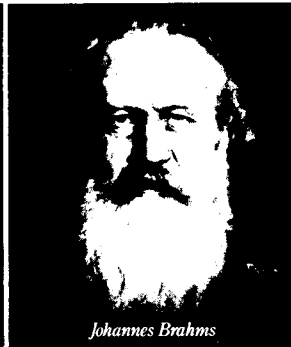
**MIND OVER
CHATTER.**

Mind Over Chatter: Notice Minnesota Public Radio's bold, but simple graphics with striking contrasts. The word "mind" appeals to intelligence compared to "chatter" which has a negative, mindless connotation. (This ad works well as a bus card and billboard poster, too.)

The Brains Behind Our Success: This Minnesota Public Radio ad appeals to intelligence — “brains.” “Success” is important to both the Societally Conscious and Achievers. The copy is simple, direct,

and clever. “Inspired” and “informed” appeal to both groups. The artwork speaks for itself, using few words. The dramatic photos of the composers add class to the ad, too.

RADIO PROUDLY PRESENTS THE BRAINS BEHIND OUR SUCCESS.



Our music leaves you inspired, our news leaves you informed and our sponsors leave you alone.

Media

As we look at the media habits of the Societally Conscious and Achievers, we see they are somewhat similar. Neither group watches much television (although when the Societally Conscious do watch, they tend to watch public television); and they don't listen to that much radio either (although, once again, the Societally Conscious tend to listen to public radio more than other VALS groups). It seems that newspaper and magazine advertising (plus promoting on your own air) may be the most effective nonprogramming means of reaching these two VALS groups.

The following tips should be helpful in developing a media strategy for your station. Please keep in mind that the ideal advertising and promotion campaign is a multimedia campaign, but many stations cannot afford to use all the vehicles suggested in this section. Don't get discouraged. This report attempts to touch on many of the techniques you may wish to try. When choosing, it is important that you narrowly define your own objectives, develop your own strategy, and choose the advertising and promotion vehicles that will work best for your station — and lie within your budget.

Public Radio. Once again, use your own air! Good programming promotes itself. Cross-promote programming that appeals to similar audiences (e.g., information programming with classical; *Morning Edition* with *All Things Considered*). But be careful. Although classical and opera may seem to have similar appeals, the age appeal is vastly different. As you can see from the Affinity Table on page 21, opera's audience is not very similar to any of the other formats or programs studied.

Magazines. The Societally Conscious and Achievers are magazine readers. Choose magazines with high indexes for your target audience. (See appendix B, table 3.) Also consider City magazines and Arts and Performance magazines and programs.

Newspapers. Newspapers are an excellent way to reach the Societally Conscious and Achievers. And newspapers provide an opportunity to get more detailed information to the public. Check appendix B, table 4, before determining which sections of the newspaper will be your most efficient buy.

Public Television. AUDIENCE 88 data indicate that existence of a joint television licensee is highly correlated with listeners discovering their public radio station through television.

If you are a joint licensee, by all means use your public television station to promote your radio programming. But first check the demographic and psychographic make-up of the public television program's audience. Possible choices would be public television news and information programming for *All Things Considered* and *Morning Edition*. *Great Performances* could be an excellent place for you to promote classical music programming.

Keep in mind that the Societally Conscious make up a large percentage of public television viewers. When matched with the appropriate program, you will inexpensively target a group more likely to tune in to your station than viewers of most commercial television programs.

Commercial Television. Although most public radio stations cannot afford to advertise on commercial television, some stations are successful in making trades with commercial stations and others have placed public service announcements (PSAs). Remember that television provides the most reach. But also be very careful to choose the programs that appeal most to your target audience.

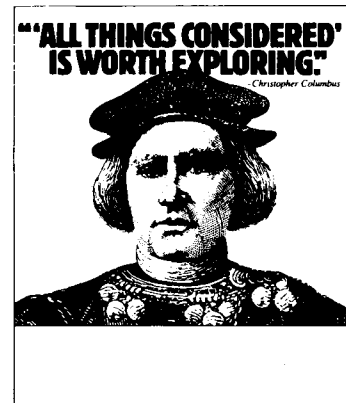
When negotiating with a commercial television station, you can make the case that a commercial station can benefit by leading its viewers to tune in to *public* radio when they get in their cars to go to work... rather than leading them over to a *commercial* competitor.

Advertisements should be placed around those programs whose demographics and psychographics complement those of your listeners. For example, *thirtysomething* could be one of your best choices, if time is available and if you can afford it!

Cable Television. Try trades with local cable stations. If you are not successful, remember that the cost of advertising on cable is usually less than it is on commercial television. The Cable News Network and the Financial News Network are two excellent choices. Both reach the Societally Conscious and Achievers. The Discovery Channel and

SAMPLE COMMERCIAL

Note the Societally Conscious appeal in the :30 spot from KERA-FM, Dallas: "Explore and investigate; nature (sea gulls, etc.)." Also notice the appeal to both the Societally Conscious and Achievers with "intelligent," "informative" programming and "Radio for Big Thinkers" theme line.



VISUAL

AUDIO

OPEN ON NINA, PINTA AND SANTA MARIA BOUNCING ACROSS OCEAN

SFX: SEA GULLS, ETC.

CUT TO CHRISTOPHER COLUMBUS

COLUMBUS: I've always been known as something of an explorer. So one day while I was watching public television, it naturally occurred to me that I should investigate public radio. There I discovered a whole new world, with intelligent, informative programming like Morning Edition and All Things Considered.

COLUMBUS' EYES GET BIG

SFX: CRUNCH

CUT TO LONG SHOT OF BOAT BUMPED UP AGAINST GIANT OLD RADIO IN MIDDLE OF OCEAN

SFX: COMMOTION AND CONFUSION

CREW MEMBER: What is it, Captain, what is it?

COLUMBUS: (PAUSES) India!

FADE TO BLACK. SUPER: "KERA 90 FM. RADIO FOR BIG THINKERS."

CREW: Hooray!

6-30

other cable networks and programs should also be studied to determine appropriate audience demographics and psychographics.

Commercial Radio. Although many commercial stations will not run public radio spots on their air because they see public radio as their competition, some stations in the system have been successful in placing ads. Others have been able to place PSAs.

It is unlikely that you will convince a commercial station to air your spots if you have similar programming, but different kinds of programming can appeal to the same kinds of people. For example, an all-news commercial station could have an audience profile similar to a classical music public radio station.

Outdoor. Outdoor provides a broad reach and can be a very efficient advertising medium. Outdoor is used primarily as a frequency or “reminder” medium, meaning that the target audience will be exposed to your message a relatively large number of times in a given time period.

Because of reach and frequency, outdoor provides a lot of “bang for the buck” and is relatively inexpensive in most markets. Many public radio stations have been successful in making trades for underwriting credits with outdoor billboard companies, or obtaining free space during slow times for the companies.

Outdoor is especially appropriate for public radio listeners since they will see the ads from their cars where they have *immediate access* to a radio: a captive audience!

PRIZM and ClusterPlus data can provide specific information on the geographical areas that are right for outdoor to reach specific targets. You can even select individual billboards, if available.

Direct Mail. Direct mail has several advantages.

- Your message can be personalized or tailored to lifestyles.
- You can provide in-depth information.

- You can get information *back* from the audience (reply device).
- It is very efficient.
- It is very targeted.

PRIZM and ClusterPlus data are valuable in targeting direct mail against clusters of audiences in specific neighborhoods and geographic areas. In addition, you can develop a list of public radio listeners and *potential* listeners through a list broker, or you can purchase names directly. Good list sources for public radio include bank cards, upscale magazine subscribers, country club memberships, patrons of the arts, charity event committees, and environmental groups.

Promotion Strategies

- Consider retail tie-ins. Select retailers whose products match the lifestyles of your targets (e.g., for the Societally Conscious, natural food stores, wine and cheese shops, music stores, travel agencies, local theaters, and cultural centers).
- Also consider give-away products with on-air mentions in exchange for in-store public relations promotion.
- Look into the variety of community events you can hold to draw Societally Conscious and Achiever current and potential listeners. Events are a good way to cement the relationship with listeners and to turn listeners into members.
- Don’t forget to seek free publicity.

Additional Resources

For additional advertising and promotion ideas, refer to the *Tune-In Advertising & Marketing* handbook, published by the Development Exchange, Inc., 1200 15th Street, NW, Suite 210, Washington, DC 20005 and the *Maximizing Your Markets* handbook, published by the Corporation for Public Broadcasting, Human Resources Development Department, 1111 16th Street, NW, Washington, DC 20036.

5.

PROFILES AND APPLICATIONS: FOUR FORMATS

You now know the characteristics of public radio listeners and how to apply AUDIENCE 88 data in your advertising and promotion decision making. But information listeners are unlike jazz listeners. Opera and classical music listeners are different from one another, too. This section highlights the differences between the listeners of information, classical music, jazz, and opera programming. (For more specific data, refer to the AUDIENCE 88 Underwriting report.)

INFORMATION LISTENERS

Education. The better educated a public radio listener is, the more likely he or she is to listen to its information programming. Four in ten listeners have pursued an education beyond college.

Age and Gender. Information programming's prime appeal is to listeners aged 35 to 44. Men are slightly more likely than women to listen.

Occupation. Over half (58%) of public radio's information listeners have professional, technical, managerial, and administrative positions.

Income. Each week, public radio's information programming is heard by more than one-third of all Americans who have household incomes of \$75,000 or more.

PRIZM. Listeners to public radio's information programming live in the most affluent neighborhoods. Thirty-two percent reside in PRIZM's Suburban 1 and 2 neighborhoods and another 23 percent live in Suburban 3 and Urban 1 neighborhoods.

ClusterPlus. Nearly one-third (30%) of information programming listeners reside in the two most upscale clusters. Almost one-fifth (19%) live in younger, single neighborhoods.

Values and Lifestyles. Information programming listeners are more likely than listeners of any of

the other formats studied to be Societally Conscious. One-half of the audience is Societally Conscious. Another quarter of the audience is made up of Achievers.

AUDIENCE 88 Data and Applications

Since information listeners tend to be upscale, well-educated professionals and managers, the advertising and promotion strategies described in section 4 will work well for information listeners.

Consider taking an informational, intellectual approach. Your images and graphics should reflect the attitudes and lifestyles of information programming listeners. When selecting colors, consider gold, deep blue, deep green, or regal colors. As for media, look carefully at the suggestions made in section 3 and the tables in appendix B.

Here are some promotional ideas:

- Ask retail experts to make guest appearances on appropriate informational shows in exchange for in-store promotion of your station or a specific program. (Feature a wine expert on a local information program in exchange for a counter card at his wine store.)
- Also consider promotion tie-ins with local performers and artists, travel agencies, book stores, and record stores.

CLASSICAL MUSIC LISTENERS

Education. Classical music is similar to information in its appeal to educated listeners. One in five Americans with postgraduate educations listens to classical music on public radio each week. Four in ten listeners of classical music on public radio have attended graduate school.

Age and Gender. Half of public radio's classical music audience is between 25 and 44 years old. Classical music has an older audience than information programming, but not as old as opera's audience. Listeners 65 years and older are 11 percent more likely than other public radio listeners to tune in to classical music each week. Classical music and opera are public radio's only major music formats that appeal slightly more to women than to men.

Occupation. Over half (55%) of all public radio classical music listeners hold professional, technical, managerial, and administrative positions.

Income. Public radio's classical music audience is nearly as affluent as its information listeners. One-quarter of all Americans with household incomes of \$75,000 or more listen to classical music on public radio each week. One in eight listeners has a household income over \$75,000, and one in three earns \$50,000 or more.

PRIZM. Classical music programming appeals slightly more to listeners in towns and rural areas than does information programming. Yet the audience is similarly upscale, with 30 percent living in PRIZM's top two socioeconomic suburban neighborhoods and another 24 percent residing in the next two.

ClusterPlus. Like information programming listeners, classical music listeners are likely to live in the most upscale neighborhoods, both urban and suburban. They also appear to be stronger in several of the more rural, older clusters than listeners to other formats.

Values and Lifestyles. Public radio's classical music reaches 11 percent of all Societally Conscious Americans each week; nearly half (45%) of its listeners are Societally Conscious. Achievers compose 26 percent of the public radio classical music audience. This VALS profile is similar to that of information programming listeners.

AUDIENCE 88 Data and Applications

Message and media applications are similar to those described for the general public radio audience and information programming listeners. In terms of content, the messages should acknowledge the audience's intellect, but have a more emotional or aesthetic appeal. Graphics should be clean, but softer than those of information programming ads.

Here are some promotional ideas:

- Do a promotion tie-in with a record store or the classical music department of a record store.
- Invite a classical music expert who is also an employee of the local record store to appear on-air. Receive in-store promotion for your classical music programming.
- Conduct a contest or a drawing. Make drawing slips available at a record store. The winner gets a trip to Salzburg and Vienna for a "Musical Extravaganza." The benefits of this type of promotion are many.
 - You will create awareness through in-store promotion.
 - You will build listenership through on-air progression of the contest. (You should consider having mini-drawings for albums or CDs in between to build excitement, suspense, and listenership.)
 - Drawing slips can provide your station with a list of names of current and potential classical music listeners (drawing slips must include name, address, etc.)
 - Since classical music listeners are big travelers, there may be an opportunity to get a travel agency to donate a trip in exchange for on-air mention of its participation. Classical music listeners are good potential customers for travel agencies!

JAZZ LISTENERS

Education. The educational appeal of public radio's jazz is different from that of other programming; listeners who have not graduated from college are somewhat more likely to tune in than others. Yet, the format's reach into well-educated segments of society is far from short. Over one-third (35%) of public radio's jazz audience has attended graduate school; in fact, one in twelve Americans with a postgraduate education listens each week.

Age and Gender. Jazz programming has the youngest appeal of any major music format on public radio. Nearly one-third of its weekly listeners are 25 to 34 years old. Men are more likely to listen than women.

Occupation. Because they are younger, public radio's jazz listeners are slightly more likely to hold nonmanagement positions, such as sales and clerical jobs. Notwithstanding, over half (55%) hold management positions.

Income. Of the public radio formats studied, there is a greater percentage of jazz listeners in lower and middle income households. Nonetheless, the format's reach into society's most affluent homes is substantial. One in ten Americans with annual household incomes greater than \$50,000 listens to public radio's jazz each week.

PRIZM. Thirty-seven percent of the format's listeners reside in urban (U1, U2, and U3) neighborhoods. This is opposed to the other formats where fewer than 27 percent live in urban neighborhoods.

ClusterPlus. Jazz listeners are primarily found in Group 6 — younger, mobile, single urban areas — and Group 9 — downscale, ethnic, urban apartment areas. (See AUDIENCE 88 *Terms & Concepts*.)

Values and Lifestyles. Jazz is just as efficient in reaching Achievers as classical music and information programming (26 percent composition each), but jazz is less likely to reach the Societally Conscious, although this group still comprises 38 percent of the total listening audience.

Experientials compose 11 percent of public radio's jazz audience. This percentage is higher than any other format for this VALS type.

AUDIENCE 88 Data and Applications

Despite their young age skew, jazz listeners appear to be “on the way up,” since many are educated (college graduates), hold sales or managerial positions, and bring home hefty household incomes. They are on their way to becoming sophisticated and gaining social status, but enjoy the lighter side of life.

If you include Experientials in your target market, keep in mind that these people seek direct experience, personal involvement, and a sense of inner growth. They are highly social and, like the Societally Conscious, attend cultural events. They frequent pop/rock concerts, night clubs, and discos. They also listen to records and tapes. (For more information, refer to the AUDIENCE 88 *Terms & Concepts* report.)

Words and images used in advertising jazz programming to Experientials should acknowledge their growing sophistication and taste in music as well as their love of fun.

Use words and phrases suggested in section 4, but also consider the following:

popular, worldly, intelligent, sophisticated, entertaining, fun, status, “your future,” “on the rise,” upbeat, trendy, exciting, experimental

In choosing graphics, focus on the lighter side. Select bright, vibrant colors that relate to the subject (Jazz!) and a more youthful audience. Less serious graphics than those for information and classical music should be used. Jazz listeners like to have fun. For media suggestions, see sections 3 and 4, and appendix B.

Here are a few promotional ideas:

- Try tie-ins with jazz clubs and record stores.
- Promote free tickets to a jazz concert.
- Invite jazz artists to appear on-air. Promote interviews on your own air.
- Host jazz festivals or co-sponsor festivals with other community groups.

OPERA LISTENERS

Age and Gender. Opera appeals to the oldest age group of any major music format on public radio. Listeners 55 to 64 years old are 37 percent more likely than other listeners to tune in to opera on public radio; those 65 or older are 90 percent more likely. In fact, one-third of opera's listeners are 65 years or older, as compared to the other formats that range from jazz with 11 percent to classical with 18 percent. Women are 14 percent more likely to listen than men.

Education. Although well educated, public radio opera listeners are less educated than information or classical music listeners. The education profile of this format's listeners is more similar to the profile of listeners to jazz on public radio.

Occupation. While jazz attracts public radio's youngest listeners, opera appeals to its oldest. Occupations reflect this difference. While listeners with top-level positions compose the bulk (42%) of opera's audience, 36 percent of opera's listeners are not in the work force, and 15 percent hold sales and clerical positions.

Income. Opera is an upscale format; 14 percent of public radio's opera listeners have household incomes of \$75,000 or more (equal to that of information at 14 percent, but slightly more than classical at 12 percent, and jazz at 9 percent). But because so many in this audience are retired, there are more listeners in the middle to lower-middle income ranges. Listeners in households earning \$10,000 to \$15,000 annually are 89 percent more likely to listen to opera than are other listeners.

PRIZM. Half of the public radio opera audience lives in suburban neighborhoods, with another quarter in small towns and older suburban retirement homes.

ClusterPlus. Like PRIZM, ClusterPlus shows a large proportion of opera listeners in upscale suburban areas and younger urban areas. There is also a tendency for opera to be stronger than the other formats in the older, lower income, rural areas with old homes.

Values and Lifestyles. The more traditional a listener's perspective on life, the more likely he or she is to listen to opera. Opera appeals to public radio's most Outer-Directed listeners. Belongers, Emulators, and Achievers compose well over half of the audience, unlike the other formats. Yet the public radio opera audience is still composed of 36 percent Societally Conscious and 30 percent Achievers.

AUDIENCE 88 Data and Applications

Keep in mind that this audience is very different from the listeners of the previous formats described. Opera listeners may be described in the following manner:

- Older, retired, Outer-Directed
- Traditional, unexperimental
- Family-, home-, church-oriented
- Satisfied with status quo
- Happy, content
- Conservative, conventional
- Nostalgic, sentimental
- Puritanical, conforming

Obviously your advertising and promotion strategies should be different for this format compared to the others!

Consider using words and phrases such as these:

content, satisfaction, tradition, family, pride, reward, sentimental, plus words applying to Achievers (See section 4.)

Graphics should be simple, uncomplicated, and straightforward. They should be self-descriptive with no "deep" or "hidden meaning." You should use soft colors and familiar images. You should appeal to the audience's sense of tradition.

Media choices might include the following:

Newspapers. Place ads in the Business, Financial, and Sports sections of the daily newspaper. Consider local community papers, neighborhood newsletters, and citizens and residents association newsletters. You may also try Home, Food, and Entertainment sections of the paper.

Magazines. Try Business and Financial magazines. Civic and Fraternal magazines also appeal to Outer-Directeds. Sports and Epicurean magazines may be good choices, too. Because of the older age skew, local and regional editions of magazines such as *Modern Maturity* plus home-oriented magazines covering topics such as cooking, home repair, and gardening may also work well.

Direct Mail. Opera listeners are a very good target for direct mail since they are older, frequently at home, and perhaps look forward to the mail as a means of entertainment and diversion. Older people show high readership and a high response rate to direct mail.

Try contests, drawings, raffles, etc. — anything that requires a response — to get audience participation.

Here are some additional promotional activities:

- Offer “A Night at the Opera.” Develop a direct mail package promoting listenership of the station and its programming. The reply device could be an entry to a drawing for opera tickets.

- Do a promotional tie-in with a local record store.
- Place posters in your local opera or symphony hall promoting your station and opera programming.

Conclusion

AUDIENCE 88 certainly doesn’t provide all the answers, but it will help you make the right advertising and promotion decisions. By carefully studying the characteristics of public radio listeners, you will be able to develop appropriate and achievable goals, objectives, and strategies to get the most impact for your efforts.

Before embarking on an advertising and promotion campaign, remember to take a look at your own market, review your past successes and failures, consider your budget, apply AUDIENCE 88 to your situation, and then carefully plan and implement your campaign.

APPENDIX A

TABLE A-1: PRIZM CLUSTER BY FORMAT AND PROGRAM

	PR	INFO	CLAS	JAZZ	OPRA	ATC	ME	WE	PHC
1 God's Country	4.2	4.3	5.0	3.0	5.6	4.8	4.7	3.1	5.0
2 Rank & File	1.6	1.5	1.0	1.7	.7	.9	1.0	2.2	.8
3 New Melting Pot	2.4	2.1	1.1	3.1	1.9	2.0	3.0	6.5	1.4
4 Heavy Industry	1.8	1.8	1.4	1.5	.0	1.5	1.7	2.5	1.3
5 Furs & Station Wagons	7.7	7.8	7.7	6.4	7.1	8.0	7.9	4.6	7.6
6 Hard Scrabble	.0	.0	.1	.1	.0	.1	.1	.3	.0
7 Pools & Patios	6.5	6.7	6.3	5.3	7.5	6.5	7.2	1.5	8.1
8 Money & Brains	3.4	3.4	4.3	2.3	4.1	3.5	3.7	1.5	3.9
9 Hispanic Mix	.9	.9	.5	1.4	.4	1.3	1.3	1.9	.7
10 Back-Country Folks	.7	.4	.6	.5	.4	.4	.5	.6	.8
11 Downtown Dixie-Style	1.3	.9	1.0	2.2	2.6	1.1	.7	.3	1.0
12 Towns & Gowns	1.6	1.7	1.9	1.9	1.9	1.5	1.6	2.2	2.1
13 Norma Rae-Ville	.4	.4	.6	.1	.0	.4	.3	.0	.0
14 Emergent Minorities	1.9	1.4	.9	4.3	1.1	1.7	.9	1.5	.8
15 Tobacco Roads	.0	.1	.1	.1	.0	.1	.1	.0	.0
16 Middle America	2.0	1.7	2.1	2.4	.7	1.5	1.7	1.2	2.4
17 New Homesteaders	1.6	1.5	1.6	1.1	1.5	1.7	1.4	.6	3.1
18 Smalltown Downtown	1.6	1.7	1.4	2.8	1.9	1.5	1.8	2.5	1.4
19 Shotguns & Pickups	1.5	1.4	1.4	2.0	1.5	1.1	1.7	1.9	1.0
20 Young Influentials	7.1	8.5	7.2	5.9	8.2	9.2	9.8	8.7	7.9
21 Urban Gold Coast	1.6	1.5	1.7	1.5	.0	1.1	1.5	3.4	1.4
22 Mines & Mills	1.0	.9	1.1	1.0	.4	.9	1.0	1.5	.9
23 New Beginnings	4.3	3.9	3.8	4.5	5.2	3.5	3.8	3.7	5.2
24 Young Suburbia	6.7	6.9	7.6	6.1	5.2	6.8	7.2	4.3	6.5
25 Two More Rungs	1.4	1.5	.7	1.8	.4	1.4	1.1	2.8	.9
26 Single City Blues	4.7	4.9	5.3	5.5	5.6	5.5	4.4	3.4	4.7
27 Levittown, USA	4.4	4.0	5.0	3.9	5.2	3.6	3.6	4.0	3.8
28 Blue Blood Estates	3.4	3.8	3.4	2.0	3.0	3.9	2.9	5.9	4.3
29 Coalburg & Corntown	1.2	1.0	1.2	1.4	1.1	1.1	.7	.9	1.3
30 Blue-Chip Blues	4.9	4.9	5.1	4.0	6.4	4.4	5.1	2.8	3.9
31 Black Enterprise	1.5	1.7	1.0	2.8	1.5	1.5	2.1	4.3	1.3
32 Public Assistance	1.6	1.5	.9	3.0	.4	1.4	1.1	.6	.2
33 Golden Ponds	1.8	1.5	2.4	1.7	3.0	1.7	1.4	2.2	2.1
34 Agri-Business	1.2	1.1	1.5	.6	2.2	1.1	.8	.6	1.7
35 Grain Belt	.4	.3	.4	.2	.4	.2	.3	.0	.5
36 Old Yankee Rows	2.1	1.8	1.4	3.5	.4	1.8	1.7	4.3	.5
37 Bohemian Mix	4.1	4.4	4.8	3.7	3.4	5.0	4.7	4.3	3.7
38 Share Croppers	.3	.3	.5	.1	.4	.2	.6	.3	.3
39 Gray Power	3.9	4.3	4.0	3.8	7.1	4.2	3.3	4.0	5.2
40 Blue-Collar Nursery	.8	.8	1.1	.9	1.9	.8	.9	.6	1.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table shows the percentage of the audience residing in each PRIZM cluster for: public radio (PR), information (INFO), classical (CLAS), jazz (JAZZ), opera (OPRA), *All Things Considered* (ATC), *Morning Edition* (ME), *Weekend Edition* (WE), and *A Prairie Home Companion* (PHC).

TABLE A-2: CLUSTERPLUS CLUSTERS BY FORMAT AND PROGRAM

	PR	INFO	CLAS	JAZZ	OPRA	ATC	ME	WE	PHC
Z01 Top Income, Well Educated, Professionals, Prestige Homes	5.0	5.6	4.5	5.2	5.3	6.4	5.5	6.9	6.4
Z02 Mobile Professionals, New Homes and Condos, Children	2.7	2.9	3.4	1.5	3.8	3.0	3.2	2.5	3.0
Z03 Mature Professionals, Established Communities	4.7	4.5	5.2	4.5	5.6	4.6	3.7	1.6	5.6
Z04 High Income, Working Couples, Homeowners, Children	3.4	3.3	2.9	2.5	2.6	3.0	3.1	1.6	2.5
Z05 Well Educated, Urban, Mobile, Professional, Few Children	4.1	5.0	3.8	3.1	5.3	5.1	5.0	4.4	4.1
Z06 Younger, Mobile, Homeowners, Working Couples, Children	4.1	4.0	4.1	4.8	2.6	4.4	3.8	4.4	5.1
Z07 Apartments and Condos, High Rent, Singles, Professionals	4.5	3.9	4.7	3.5	1.5	3.9	4.4	6.9	3.5
Z08 Young, Mobile, White Collar Workers, New Homes and Condos	1.7	2.1	1.8	1.7	.8	2.2	2.5	1.9	2.9
Z09 Young, Mobile, Married Couples, Children, New Homes	1.3	1.5	1.0	.6	1.1	1.3	1.6	.9	1.4
Z10 Younger, Mobile, White Collar Workers, Homes Built in 60s	3.3	3.2	4.3	2.2	4.1	3.3	2.7	2.5	3.7
Z11 Mobile, White Collar Workers, Above Average Home Value	2.8	2.6	3.1	2.5	2.6	2.6	2.6	2.5	4.7
Z12 Older, White Collar Workers, Fewer Children, Northeast	4.0	4.0	4.4	4.5	5.3	4.0	3.0	5.3	3.4
Z13 Average Educated, Married Couples, Children, Homeowners	2.5	2.2	3.1	1.6	1.1	1.9	2.9	1.3	2.0
Z14 Younger, Urban, White Collar Workers, Homes Built in 60s	4.2	4.0	4.2	4.2	3.4	3.4	4.3	2.8	3.7
Z15 Older, Urban, White Collar Workers, Singles, Few Children	4.6	4.8	3.7	2.8	4.9	4.1	4.5	8.8	4.4
Z16 Younger, Mobile, Ethnic, High Home Values, Urban Areas	1.8	1.9	1.0	1.8	.4	2.0	2.5	1.9	.9
Z17 Well Educated, Young, Singles, Apartments, Few Children	4.2	4.8	4.9	5.1	3.0	4.5	5.6	2.2	6.5
Z18 Average Income, Older Homes, Low Mobility, Industrial Areas	3.3	3.3	2.6	3.0	3.4	2.4	2.8	.9	2.0
Z19 Younger, Mobile, Urban, Ethnic, Singles, Few Children	3.6	3.7	2.5	3.5	3.8	4.2	3.8	2.5	2.9
Z20 Young, Mobile, Families with Children, New Homes	1.3	1.4	1.5	1.4	1.1	1.4	1.3	2.5	1.4
Z21 Mobile, White Collar Workers, Above Average Home Value	1.1	1.0	1.3	1.2	1.9	.7	.9	.6	1.1
Z22 Young, Small Town Families with Fewer Children	1.1	1.1	1.3	1.2	1.9	1.1	1.2	2.5	1.2
Z23 Average Income and Education, Small Towns, Central Region	2.5	2.2	3.4	2.1	3.0	2.2	2.2	1.9	2.6
Z24 Blue Collar Homeowners, Children, Rural Central Region	.8	.6	.9	.7	.8	.5	.7	.3	.9
Z25 Below Average Income, Singles, Fewer Children, Older Homes	4.3	4.5	4.7	4.0	8.3	5.0	4.2	5.6	4.2
Z26 Average Income, Smaller Homes, Mobile Homes, Rural Areas	.4	.3	.5	.1	.0	.2	.4	.3	.2
Z27 Average Income, Older, Low Mobility, Rural Areas, Old Homes	1.0	.9	1.0	.9	1.1	1.0	.9	.6	.6
Z28 Above Average Income, Younger, Black Families with Children	.6	.5	.5	1.2	.0	.7	.4	.0	.2
Z29 Older, Smaller Single Family Homes, Fewer Children	.6	.4	.7	.6	1.1	.6	.5	1.3	.8
Z30 Older, Low Mobility, West Central Farm Areas, Old Homes	.2	.1	.2	.1	.8	.1	.1	.3	.0
Z31 Average Income, Blue Collar Workers, Homeowners, Rural	.6	.5	.7	.9	.0	.5	.4	.3	.4
Z32 Old, Small Town Homeowners, Retirees, Mobile Homes	1.3	1.5	1.6	1.2	3.0	1.4	.9	.9	2.7
Z33 Average Income, Small Town, Blue Collar Workers	.3	.2	.4	.6	1.1	.1	.3	.0	.5
Z34 Average Income, Blue Collar, Manufacturing Areas, Southeast	.6	.7	1.1	.1	.4	.7	1.1	.0	.4
Z35 Very Low Income, Singles, Urban Ethnic Apartment Areas	4.6	5.1	4.8	5.5	4.1	5.6	6.1	8.4	4.7
Z36 Average Income, Ethnic Families, Children, Western Region	.3	.4	.1	.1	.0	.3	.6	.0	.0
Z37 Average Educated Singles, Old Housing, Urb. Apartment Areas	3.3	3.1	2.9	3.7	3.4	2.3	2.8	1.9	2.6
Z38 Low Income Retirees, Older Housing, Rural Areas	.1	.1	.0	.1	.0	.2	.1	.0	.2
Z39 Average Income, Older, Low Mobility, Blue Collar Workers	.8	.5	.8	.9	.0	.8	.3	.6	.8
Z40 Less Educated, Urban, Singles, Apartments, Old Housing	2.5	2.5	2.2	4.3	1.1	3.1	2.6	3.4	2.2
Z41 Older, Low Mobility, Blue Collar Homeowners, Rural Areas	.2	.1	.3	.2	.4	.1	.1	.3	.2
Z42 Younger, Unskilled Minorities, Children, Western Region	.2	.2	.0	.8	.0	.3	.0	.0	.1
Z43 Older, Low Mobility, Blue Collar Worker Families, Children	.3	.4	.5	.2	.8	.3	.5	.6	.1
Z44 Poorly Educated, Rural, Blue Collar Families, Children	.1	.0	.0	.0	.0	.0	.0	.0	.0
Z45 Unskilled, Urban Blacks, Apartments, Older Housing	2.5	2.2	1.9	6.1	1.9	2.0	1.8	2.5	1.8
Z46 Lowest Income, Urban Minorities, Singles, Apartments	2.4	2.0	1.6	3.4	3.0	2.4	2.1	3.1	.9
Z47 Poorly Educated, Unskilled, Rural, Southern Blacks	.0	.0	.0	.0	.0	.0	.0	.0	.0
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table shows the percentage of the audience residing in each ClusterPlus cluster for: public radio (PR), information (INFO), classical (CLAS), jazz (JAZZ), opera (OPRA), *All Things Considered* (ATC), *Morning Edition* (ME), *Weekend Edition* (WE), and *A Prairie Home Companion* (PHC).

APPENDIX B

TABLE B-1: DEMOGRAPHIC PROFILES OF THE VALS TYPES

	Total Adults	Societally Conscious	Achievers
Number (millions)	159	18.8	34.1
Males	47	46	61
Females	53	54	39
Age 18-24	18	4	12
Age 25-34	23	37	23
Age 35-44	16	43	21
Age 45-54	14	8	27
Age 55-64	14	7	14
Age 65+	15	1	3
Household income under \$10,000	18	3	2
Income \$10,000-14,999	19	8	3
Income \$15,000-19,999	11	8	4
Income \$20,000-24,999	12	18	7
Income \$25,000+	39	63	84
Income \$30,000+	29	51	70
Income \$40,000+	13	16	38
Not high school graduate	30	11	10
High school graduate	38	17	37
Attended college	17	21	27
College graduate	15	51	26

Table shows the demographic profiles of all Americans, and those who are Societally Conscious and Achievers. Numbers display the percentage of each fitting the given demographic description.

Source: 1981 SMRB/VALS.

TABLE B-2: MEAN LEVELS OF MEDIA EXPOSURE

	Maga- zines	News- papers	Radio	Tele- vision
Total Adults	5.7	3.2	26.7	88.7
Societally Conscious	7.5	3.6	25.9	71.4
Achievers	6.2	3.7	26.7	70.4

Table shows the mean (average) levels of media exposure for all Americans, and those who are Societally Conscious and Achievers.

Note: Magazines: number of magazines read.

Newspapers: number of issues read on two weekdays and two weekends.

Radio: number of quarter-hours listened on two weekdays.

Television: number of half-hours viewed over two weeks.

Source: 1981 SMRB/VALS.

TABLE B-3: READERSHIP OF MAGAZINE TYPES

Magazine Type	Total Adults	Societally Conscious	Achievers
Automotive			
Millions of adults	2.4	.30	.58
Index of readership	100	105	112
Business & Finance			
Millions of adults	2.8	.60	1.1
Index of readership	100	178	185
Child rearing			
Millions of adults	2.0	.39	.50
Index of readership	100	165	117
Civic/fraternal			
Millions of adults	.74	.06	.23
Index of readership	100	66	143
Epicurean			
Millions of adults	2.4	.68	.74
Index of readership	100	239	143
Fishing/hunting			
Millions of adults	5.3	.45	1.3
Index of readership	100	72	115
General appeal			
Millions of adults	16.4	2.1	3.6
Index of readership	100	110	102
Health			
Millions of adults	3.7	.52	.71
Index of readership	100	121	90
Home & home service			
Millions of adults	6.6	1.0	1.6
Index of readership	100	128	109
Mechanics			
Millions of adults	5.3	.68	1.5
Index of readership	100	109	132
Men's			
Millions of adults	4.8	.94	1.0
Index of readership	100	166	97

Table shows the number of all Americans, and the number of those who are Societally Conscious and Achievers, who read each type of magazine. The index of readership indicates whether a person in the Societally Conscious or Achiever group is more (greater than 100) or less (less than 100) likely than another person to read each type of magazine.

Source: 1981 SMRB/VALS.

TABLE B-3: READERSHIP OF MAGAZINE TYPES (continued)

Magazine Type	Total Adults	Societally Conscious	Achievers
Motorcycle			
Millions of adults	1.8	.19	.41
Index of readership	100	87	106
National Sunday magazines			
Millions of adults	30.3	4.3	7.7
Index of readership	100	120	117
National weekly newspapers			
Millions of adults	11.8	1.4	1.7
Index of readership	100	99	67
News			
Millions of adults	11.1	1.9	3.3
Index of readership	100	148	136
Special appeal			
Millions of adults	3.4	.72	.95
Index of readership	100	178	128
Sports			
Millions of adults	1.6	.24	.52
Index of readership	100	124	150
Women's			
Millions of adults	8.4	1.2	1.6
Index of readership	100	121	88
Women's fashion, beauty, and grooming			
Millions of adults	4.0	.96	.83
Index of readership	100	202	96

Table shows the number of all Americans, and the number of those who are Societally Conscious and Achievers, who read each type of magazine. The index of readership indicates whether a person in the Societally Conscious or Achiever group is more (greater than 100) or less (less than 100) likely than another person to read each type of magazine.

Source: 1981 SMRB/VALS.

TABLE B-4: READERSHIP OF DAILY NEWSPAPER SECTIONS

Newspaper Section	Total Adults	Societally Conscious	Achievers
Business/financial			
Millions of adults	17.7	2.3	4.9
Index of readership	100	110	130
Classified			
Millions of adults	16.7	2.0	4.1
Index of readership	100	103	115
Comics			
Millions of adults	18.7	2.5	3.7
Index of readership	100	111	92
Editorial			
Millions of adults	19.5	2.7	5.1
Index of readership	100	120	122
Entertainment			
Millions of adults	23.1	3.1	5.2
Index of readership	100	113	106
Food			
Millions of adults	19.3	2.5	4.1
Index of readership	100	112	99
General news			
Millions of adults	36.6	4.4	8.9
Index of readership	100	103	114
Home			
Millions of adults	16.5	2.5	3.6
Index of readership	100	130	103
Sports			
Millions of adults	21.4	2.5	5.6
Index of readership	100	99	123
TV/radio			
Millions of adults	18.6	2.0	3.7
Index of readership	100	94	94

Table shows the number of all Americans, and the number of those who are Societally Conscious and Achievers, who read each newspaper section. The index of readership indicates whether a person in the Societally Conscious or Achiever group is more (greater than 100) or less (less than 100) likely than another person to read each section.

Source: 1981 SMRB/VALS.

TABLE B-5: TOTAL TELEVISION VIEWING

	Total Adults	Societally Conscious	Achievers
Quintile 1			
Millions of adults	33	2.1	4.2
Index of viewing	100	54	59
Quintile 2			
Millions of adults	33	3.5	6.3
Index of viewing	100	91	91
Quintile 3			
Millions of adults	30	3.8	7.7
Index of viewing	100	106	119
Quintile 4			
Millions of adults	33	4.3	8.3
Index of viewing	100	112	119
Quintile 5			
Millions of adults	30	5.0	7.5
Index of viewing	100	141	115

Table shows the number of all Americans, and the number of those who are Societally Conscious and Achievers, who spend a certain amount of time viewing television. The index of viewing indicates whether a person in the Societally Conscious or Achiever group is more (greater than 100) or less (less than 100) likely than another person to view the given amount of television.

Note: Based on number of half hours viewed in two weeks, Monday-Sunday, 8 a.m. to 2 a.m.

Quintile 1: men, 117 or more; women, 147 or more.

Quintile 2: men, 76-116; women, 101-146.

Quintile 3: men, 53-75; women, 68-100.

Quintile 4: men, 30-52; women, 38-67.

Quintile 5: men, less than 30; women, less than 38.

Source: 1981 SMRB/VALS.

TABLE B-6: TOTAL RADIO LISTENING

	Total Adults	Societally Conscious	Achievers
Quintile 1			
Millions of adults	32	3.2	6.9
Index of listening	100	83	100
Quintile 2			
Millions of adults	31	3.9	6.4
Index of listening	100	107	97
Quintile 3			
Millions of adults	34	4.9	6.6
Index of listening	100	125	93
Quintile 4			
Millions of adults	32	4.0	7.7
Index of listening	100	107	112
Quintile 5			
Millions of adults	31	2.8	6.4
Index of listening	100	77	98

Table shows the number of all Americans, and the number of those who are Societally Conscious and Achievers, who spend a certain amount of time listening to radio. The index of listening indicates whether a person in the Societally Conscious or Achiever group is more (greater than 100) or less (less than 100) likely than another person to listen to the given amount of radio.

Note: Based on number of quarter hours listened on two weekdays, Monday-Friday, 24 hours.

Quintile 1: men, 49 or more; women, 43 or more.

Quintile 2: men, 28-48; women, 24-42.

Quintile 3: men, 15-27; women, 12-23.

Quintile 4: men, 6-14; women, 4-11.

Quintile 5: men, less than 6; women, less than 4.

Source: 1981 SMRB/VALS.



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Issues and Implications

by Thomas J. Thomas and Theresa R. Clifford
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Issues & Implications

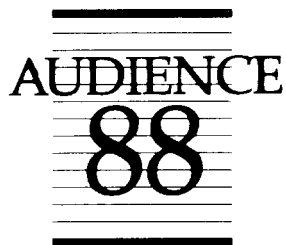
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Takoma Park, MD



A COMPREHENSIVE ANALYSIS
OF PUBLIC RADIO LISTENERS

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FOREWORD

The fundamental proposition of AUDIENCE 88 is “know your audience.” It is an effort to pierce the veil between the broadcaster and the listener, and to capture the clearest possible picture of the people who welcome public radio into their lives.

Our findings give public radio broadcasters, and those with whom they work, a detailed portrait of the public radio audience. Through in-depth reports on *Underwriting*, *Advertising & Promotion*, *Programming*, and *Membership*, we have applied this information to various areas of station operations.

This report takes a step back from day-to-day station work, and explores the broader implications of AUDIENCE 88’s findings for public radio’s overall growth and development. We have chosen a short list of questions to address, in the hope that clear understanding of major points will provide a context for consideration of the many specific issues public radio will face in the months and years ahead.

As AUDIENCE 88’s findings work their way through the public radio system, we find people talking about public radio in a new way, with a different vocabulary. We expect a lasting contribution of this study will be a reshaping of the ongoing dialogue among producers, programmers, development staff, managers, and funders. The new framework is centered on the power of programming, a major change from public radio’s focus through the mid-1980’s on financial and structural issues. As important, though, AUDIENCE 88 establishes the clear links between programming and the full range of station and system operations.

The key element in that linkage is the concept of programming appeal – the special attraction that specific programming holds for specific listeners. Appeal is the mechanism through which programming shapes the audience, with a cascade of ramifications for the entire public radio enterprise. Appeal is at the center of this report.

AUDIENCE 88 has been an extraordinary project, a two-year learning exercise focused on the fundamentals of our profession. We are indebted to a number of individuals and organizations who gave us this opportunity. David Giovannoni initiated and directed the project, guided the basic research, and challenged and stimulated our thinking throughout. Linda Liebold brought a wealth of expertise in development and promotion to the AUDIENCE 88 team. Ric Grefé and Ted Coltman of the Corporation for Public Broadcasting secured the funding that made the project possible, and provided continuing guidance for our work. National Public Radio contributed a massive database that was the starting point for our research.

This report is the last in the AUDIENCE 88 series. It should be only the beginning, however, of a better understanding of public radio’s audience and greater attention to whom public radio serves.

Thomas J. Thomas
Theresa R. Clifford

Takoma Park, MD
December, 1988

1. NICHE

Public radio fills a special niche within a broadcasting framework of some 10,000 radio stations. Like all stations, public radio competes for listeners' attention by appealing to a target segment of the audience. By better understanding the appeal of its programming, public radio broadcasters can strengthen their present service, and make better decisions about choices for the future.

America's public radio stations, just over 300 in number, operate alongside more than 9,000 commercial stations that have most of the spectrum space, most of the money, and most of the listeners.

For every public station, the average listener has 30 commercial alternatives from which to choose. In the largest markets, where most listeners live, there are more than 80 radio options.

With this abundance of choices, virtually every American listens to radio. But most Americans actually use less than three radio stations over the course of a typical week.

It is the nature of radio competition that programming appeal determines the capacity of a station to attract listeners. Radio stations target their programming to appeal to an audience segment that will use the service on a regular basis. Stations compete with one another either by identifying audience segments that other stations do not serve or by producing programming that is more appealing to a segment of the audience than the choices offered by other stations.

Dial position, signal availability, promotion budgets, and the number of stations in a market are all significant, but nothing matches the importance of a station's programming in determining its share of a community's audience.

Public radio's current programming exerts an extraordinary appeal to some four million Americans each week, or about two percent of this country's population. These Americans listen to public radio

more than any other station on the radio dial. Another six million listeners make public radio one of their radio choices during the week.

Even as AUDIENCE 88 has focused on the listeners that public radio serves so well, it has also highlighted the large number of people who do not listen to public radio. Most listeners prefer the programming of a commercial station, taking only as much time with public radio as it takes to decide they really want to listen to something else.

What of these millions who do not listen to public radio. Do these listeners know what they are missing? The fact is, in at least some vague way, most do.

Over time, the tendency to tune around while driving, to switch the dial out of dissatisfaction with another station's programming, a change in the daily routine, conversation with friends about radio, and other such circumstances will bring most every listener to the public radio station for at least a moment.

To the degree that the programming connects in some way with such listeners — appeals to them — they may come back. If the programming fails to strike a responsive chord in some way, however, it may be weeks, months, or longer, before they try again.

For public radio professionals who dedicate their lives to programming that they believe is better than commercial fare, it is difficult to accept that people who don't listen to public radio actually

prefer not just one, but several other radio stations.

It is simply a fact, though, that as long as public radio broadcasts alongside over 9,000 commercial competitors, it can aspire to truly serve only a portion of America's radio listeners. If the public radio system tripled its size and audience, more than 9 out of every 10 Americans would still listen more often to the service of a commercial outlet.

In sum, whatever public radio's aspirations and whatever its accomplishments, its role is to fill a special niche within a larger broadcasting enterprise.

The nature of public radio's niche is in some measure predetermined by factors beyond the immediate control of individual stations — by the terms of noncommercial licenses, by public broadcasting's Congressional charter, by the missions of the licensees. Stations' opportunities are also affected by the programming strategies of other radio stations in their market and by a host of other factors in the environment.

There is also a great deal of choice — in the diversity of the constituencies public radio can elect to serve, in the decentralized control of the enterprise, and in the evolving marketplace for national programming. For these reasons, individual stations will fill somewhat different niches within their respective communities.

Creativity, competitiveness, successful targeting, organizational effectiveness, and other elements under a station's own control clearly make a difference. Some public radio stations serve tens of thousands of listeners while others, under similar circumstances, serve just thousands.

In this context, AUDIENCE 88 has a twofold purpose. The first step, with immediate application,

is to clarify who public radio now serves. The more knowledge public radio broadcasters have about the people who are attracted to the formats and programs they present, the more effectively they can serve those listeners' needs and interests. They can be more efficient in promoting programming, more persuasive in asking for listeners' financial support, and take a better case to the businesses that underwrite many of their efforts.

Further, by understanding the relationships between programming decisions and the ways in which listeners are likely to respond to them, public radio can make better strategic choices about the broader configuration of service to the American people, both for individual stations and for the public radio system as a whole.

The first half of this report, Sections 2 and 3, presents AUDIENCE 88's most powerful concept — programming appeal. We begin with an exploration of public radio's distinctive appeal within the broader radio environment, and the different kind of listener this appeal brings to the public radio audience.

We then examine the distinctive appeals of public radio's major formats — information programming, classical music, and jazz. We also discover a special kind of listener at the heart of the public radio audience.

The second half of the report, Sections 4 and 5, applies this analysis to two critical issues that will define public radio's role within the radio enterprise. We first look at audience building, the broad effort to increase the number of Americans whom public radio serves in a significant, important way.

We conclude with a discussion of targeting, the provocative and entwined questions of what service public radio should provide and to whom that service should be directed.

2. AUDIENCE

The theory of AUDIENCE 88 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. Public radio's listeners are different from other listeners in their demographics, values, and lifestyles.

Each moment of radio programming — each piece of music played, each news story reported, each anecdote told by a program host — encourages some people to listen and others to tune away.

Sometimes people can articulate quite clearly what it is about a station and its programming that attracts or repels them; sometimes the reasons are more elusive and intangible. Whether the reasons are obvious or not, most people can and do make quick and clear judgments about what they will and will not listen to on the radio. A twist of the dial, a punch of a button — the choice is made.

It takes only a few moments of thought about one's own radio listening habits to understand the basic concept of appeal. There are many stations to which one will listen only the few moments it takes to sense a complete absence of interest, the total lack of *appeal*. There are other stations, perhaps a half dozen or so, that constitute one's personal radio repertoire — that have *some appeal*. And for most people, there are two or three stations that are the favorites and that get most of the listening — that exert a strong appeal.

The Theory of Audience 88

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. Put another way, different kinds of stations and programming will appeal to different kinds of people. Each programming decision will open opportunities to serve certain kinds of listeners and impose con-

straints on ever reaching others.

Programming, the theory continues, causes and defines audience. By shaping programming content, form, and style of presentation, a station will shape its audience. The more thoroughly broadcasters understand this relationship, the better they can control the nature and size of their audience.

Further, with better knowledge of the kinds of people to whom the station and its programming is appealing, broadcasters can better plan and implement the range of activities that are keyed to the listening relationship, from advertising to promotion to membership campaigns.

AUDIENCE 88 has emphatically confirmed the theory. Among the central findings are these:

- Listeners who choose public radio are significantly different from those who do not.
- Listeners who make a public radio station their favorite are different from those who just sample its programming.
- These differences extend to the kinds of listeners who are attracted to each of public radio's distinctive formats and services.
- All of these differences are reflected in the extent to which listeners consider public radio important and worthy of their financial support.

This chapter explores the appeal of public radio within the broader radio environment and the different kind of listener that public radio attracts.

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

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

AUDIENCE DIVERSITY

AUDIENCE 88 focuses on a few listener traits — especially education, age, and values and lifestyle characteristics — that are powerful predictors of listening to public radio programming. These characteristics are emphasized because they are useful in explaining behavior, not because they best describe public radio's listeners as individuals.

We have found, however, that the emphasis on shared traits can create the quite inaccurate sense that all public radio listeners are alike.

A characteristic may be useful in describing a group of listeners, to public radio generally or to a particular program or format. But that does not mean that *all* public radio listeners share that characteristic.

As a group, public radio's audience is remarkable for its level of educational attainment. But this does not mean that *all* listeners are well educated. While 85 percent of the weekly audience have attended at least one year of college, 15 percent have not; indeed, 3 percent have not graduated high school. These are not children: AUDIENCE 88 studies only listeners 18 years old or older.

Further, even when listeners have one characteristic in common, there are many ways, documented by AUDIENCE 88, in which they are still a diverse group of individuals.

While 9 in 10 (91%) AUDIENCE 88 respondents are white, 6 percent are black, 2 percent are Asian, and 1 percent is Hispanic. Public radio's audience is half (51%) male, half (49%) female.

Listeners also express great diversity in the ways they describe themselves. For instance, half (52%) of the individuals in the weekly cume consider themselves middle class; 36 percent say they are upper middle or upper class; and 12 percent think of themselves as lower or lower middle class.

Politically, almost half (46%) of the individuals in the weekly audience consider themselves liberal; 26 percent think of themselves as middle of the road; and 28 percent say they are conservative.

It is crucial for the reader to distinguish between AUDIENCE 88's segmentation analysis — which by its nature focuses on the similarities of listeners — and stereotypes and cliches.

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.

As we draw these demographic and psychographic portraits of listeners, it is important to remember that we are highlighting traits that are most useful in *distinguishing* listeners from nonlisteners. It would be a serious mistake to conclude that these characteristics *determine* public radio listening.

There are millions of Americans who share the traits of public radio listeners but who don't listen. For every person who went to graduate school who does listen to public radio, there are two more who don't. For every Societally Conscious public radio listener, there are four Societally Conscious people who choose other stations.

AUDIENCE 88 is, in effect, building a continuum. At one end are people who are most "public-radio-like"; they have a number of traits in common. At the other end are people with virtually no connection to public radio; they may share one or more characteristics with public radio listeners, but as a group they are less "public-radio-like."

This continuum emerges clearly when we segment listeners by *utiligraphics* — how they use radio in general and public radio in particular.

We first determine whether public radio is a listener's favorite — whether he or she listens to a public station as much as, or more than, any other station. We call those who do core listeners. If some other station is their favorite, we place them in the fringe audience.

A second test is how much time a person actually spends listening to a public station, favorite or not. People who listen six hours or more in a week are called heavy listeners; those who listen less than six hours a week are light listeners.

The two tests, together, yield AUDIENCE 88's four utiligraphic segments:

Heavy core — A public radio station is their favorite, and they listen to it six hours or more a week.

Light core — A public radio station is also their

favorite, but they listen less than six hours.

Heavy fringe — Another station is their favorite, but they still give public radio six hours or more of listening.

Light fringe — Another station is their favorite, and they give public radio less than six hours of listening per week.

	<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

Note that 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, light fringe listeners, who make up half of public radio's weekly listeners, account for less than 15 percent of all listening.

By searching for distinctions along the continuum from light fringe to heavy core, we can further sharpen our knowledge of the public radio audience. The core listeners are the key. These are clearly the people for whom public radio has its greatest appeal.

As we move toward public radio's core listeners, the Societally Conscious personality profile and a person's education take on even more descriptive power. Over half of public radio's heavy 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 others (heavy) and are more loyal (core). Over 70 percent of public radio's heavy 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.

WHOSE AUDIENCE?

The AUDIENCE 88 database is built on the foundation of National Public Radio's Public Radio Audience Profile (PRAP), an annual study of the audience for programs and formats carried by NPR member stations. NPR's PRAP system, which represents an annual investment of over \$75,000, was made available to AUDIENCE 88 at no cost and made this study possible.

The PRAP system is representative of NPR member stations, not the entire public radio system. When AUDIENCE 88 data were collected, 35 of the 288 radio stations supported by the Corporation for Public Broadcasting were not members of NPR. By 1988, the numbers had grown to 311 CPB-qualified stations, of which 59 are not members of NPR.

Many of AUDIENCE 88's findings apply to all public stations, whether members of NPR or not. Concepts such as appeal, segmentation, and targeting are fundamental to the radio medium in this country. Findings about the appeal of basic kinds of public radio programming — information, classical music, jazz, drama, children's programming — should also hold up regardless of the network affiliation of the station on which such programming is heard.

At the same time, it is important to recognize that there are some significant distinctions between those stations that are members of NPR and those that are not. To the extent that these differences result in different programming, they are also likely to make for different kinds of listeners.

Most NPR stations are licensed to universities and colleges (65 percent) or state and local government (10 percent). In contrast, two-thirds of CPB-qualified stations that are not members of NPR are licensed to independent, community-based organizations. This difference in licensee type is reflected in different missions and goals, different target audiences, and different programming.

Of the some two dozen CPB-qualified stations controlled by minorities and primarily targeted for minority listeners, most are not members of NPR.

Almost all of the CPB-qualified stations that are not members of NPR serve communities with one or more NPR member stations. These stations consciously seek to provide programming that is distinct from the NPR member stations.

Finally, AUDIENCE 88 demonstrates that its sample audience is dramatically shaped by the appeal of NPR's news magazines, programs that are not available to nonmember stations.

In short, there are many reasons to believe that listeners served by stations that are not members of NPR are different from the NPR station audience. Because of this, AUDIENCE 88 most certainly understates the diversity of the service that public radio provides to the American people and the diversity of the listeners who respond to it.

We believe any future national study of public radio listeners should include a broader station sample.

We must also consider, though, that there are as many differences among NPR members as there are between NPR members and other public stations — and many linkages that transcend membership. An NPR jazz station may have more in common with another, nonmember jazz station than with an NPR member classical music station.

In sum, when AUDIENCE 88 refers to the public radio audience, the reader must remember that the reference point is the audience for NPR stations. But lest we miss the forest for the trees, it is equally important to remember that those things public radio stations have in common, and that set them apart from all other radio broadcasters, are generally far more important than the distinctions within public radio itself.

3.

PROGRAMMING APPEAL

Public radio's different formats generate distinctive appeals. By using several methods of audience analysis, we can identify different kinds of listeners who are attracted to different formats.

AUDIENCE 88 identifies a particular listener type, the mixed format listener, that is especially significant in shaping the day-to-day audience and the level of local financial support.

Public radio is not a format. The 72 stations studied for AUDIENCE 88 present a wide range of programming, including information, classical music, and jazz — the three dominant program types — as well as folk music, drama, children's programming, and others. Most stations devote the overwhelming majority of their schedule to two, or perhaps three, such programming types. Some are more eclectic.

The portrait of listeners in the preceding section reflects the combined appeal of all these formats and programs. While there are overlaps among the groups of people attracted to each of public radio's primary services, there are also significant differences. Each has its distinctive appeal.

In this section, we shift the focus to those factors that distinguish listeners to one public radio format from listeners to another public radio format. To understand better the appeal of different programming on public radio, AUDIENCE 88 developed several analyses of the relationships between listeners and program types:

- *Format listeners* — By looking at the *cumulative audience* for a format, we give equal weight to each of the format's listeners.
- *Format listening* — By looking at the *average quarter hour audience* for a format, we give more attention to the balance of people listening at any one time.
- *Format-dominant listeners* — By dividing listeners according to their *favorite public radio format*, we isolate each format's distinctive appeal.

Appeal to Listeners: The Cumulative Audience

The AUDIENCE 88 *Underwriting* report presents a thorough analysis of the cumulative audience for each of public radio's principal formats and programs, highlighting those variables most likely to interest prospective underwriters: age, education, occupation, income, geodemographics, and VALS segment.

The cumulative audience (or *cume*) for a format or program is just like the cumulative audience, for a station — it is the total number of people who listen during the survey period.

Cume numbers are most often used to report *how many* people listen — to a station, a format, or a program. These numbers are also the most common basis for describing the *composition* of an audience (e.g., 49 percent of public radio listeners are women). This information is important in many respects but, by itself, provides only limited guidance about appeal.

As used in AUDIENCE 88, appeal is not synonymous with popularity. Therefore, knowing how many people listen is not, in itself, a measure of appeal. Opera is unpopular with most public radio listeners; it has a relatively small cume as a format. But opera has a pronounced, identifiable appeal for the audience that does listen.

Composition of an audience is a better indicator of appeal than size, especially if one can place that information in context, such as through comparison to other stations, formats, or programs.

For example, 31 percent of public radio's jazz listeners are 25 to 34 years old. One sees the strong appeal jazz holds for this group when one learns that people who listen to public radio's jazz are over 20 percent more likely to be in this age group.

By concentrating on the comparative context, cumulative audience analysis provides AUDIENCE 88's first glimpse at some of the critical differences among major program elements.

Data for format listeners reveals clearly, for example, that information programming attracts public radio's best educated, most affluent, and most Societally Conscious listeners. Jazz programming appeals to younger, more Outer-Directed listeners. Classical music's appeal seems to track closely with information programming; the key differences are that classical listeners are somewhat older, a little less educated, a little less affluent.

The broad reading of appeal that can be gleaned from cumulative audience analysis is an important starting point, but the picture is in soft focus. In cumulative measures, all listeners count the same, whether they listen a little or a lot. The impact of those to whom the appeal of a format or program is strongest is blurred by the many occasional listeners in the mix.

To gain a more precise understanding of the different appeals of public radio's various programming elements, we need to look beyond listeners to patterns of listening.

Evaluating Listening: The AQH Audience

The AUDIENCE 88 *Programming* report sharpens our understanding of the differences among public radio formats and programs. Like *Underwriting*, this report tracks the audience for each of public radio's major formats and programs. This time, however, the basis of analysis is the average quarter-hour audience (AQH) rather than the cumulative audience.

AQH reflects the composition of the audience at any one time; it thus yields an audience portrait that differs from that developed using the cumulative audience. Because people who listen a lot are more likely to be listening at any given

time, public radio's heavy listeners make up the bulk of the AQH audience.

Looking at public radio overall, heavy core listeners are just a little more than a quarter of the cumulative audience. But this group constitutes two-thirds of the audience during an average quarter hour. Each format has its own heavy core listeners, who will be a fraction of the cumulative audience for the format but a major portion of that format's AQH audience.

On the assumption that those people who listen a lot to a particular format or program are those to whom that format or program has a strong appeal, AQH analysis of formats and programs gives a better perspective on the relative appeal of these public radio programming elements.

The *Programming* report's AQH analysis highlights a short list of variables — age, education, and VALS (values and lifestyle) — that best differentiate the listeners to public radio's various programs and formats. Table 31 on the opposite page summarizes these findings.

The *Programming* report also analyzes patterns of affinity among the appeals of public radio's programming elements. All public radio programming appeals to highly educated listeners. All public radio programming has a strong appeal to Inner-Directed, Societally Conscious listeners. By carefully scrutinizing the patterns in the AQH audience, however, some important distinctions among the major formats begin to appear.

The biggest difference in appeal among the three dominant public radio formats is age, but there are also important differences in VALS types. In simplest terms, information and classical programming share more affinity with each other than either does with jazz.

The AQH-based analysis presented in the *Programming* report takes us another major step forward in understanding the distinctive appeals of public radio's major formats and programs — both their affinities and their differences with respect to each other. At the same time, it is possible to make still sharper distinctions among the appeals of the different formats and programs on public radio.

Appeal: Formats and Listener Types

Now that we have examined the two relationships, *listeners* to formats and *listening* to formats, our final step is to examine the core of each format's audience, where the format's appeal is strongest.

In Section 2, we described AUDIENCE 88's use of utiligraphic segmentation to understand the overall appeal of public radio. AUDIENCE 88 identifies core public radio listeners, whose favorite station is a public station, and fringe listeners, who spend most of their listening time with another outlet. The core listeners give the best reading of public radio's appeal.

We can apply the same analytic approach to the listeners of specific formats and programs. Within the overall public radio audience, there are those listeners for whom information programming, for example, is their favorite format — they use it more than any other public radio format — and they are the information format's core audience. Information listeners who use some other format more are in the information format's fringe audience.

By examining a format's core listeners, we should get the clearest perspective yet about that format's appeal.

The utiligraphic analysis of overall public radio listening involved a single variable — public radio use. To develop a similar analysis for the several dominant formats heard on public radio requires some modification of the approach:

- Rather than employ all four utiligraphic segments used for overall public radio listening — core and fringe, light and heavy — we took the simpler approach of identifying listeners by their favorite format.
- Recognizing that there may be important differences between those listeners whose listening is dominated by use of a single format and those who make heavy use of two or more formats, we created a “mixed format” category.
- To keep the analysis statistically reliable and understandable, we focused on public radio's three most widely used formats — information, classical music, and jazz.

Table 31. Composition of Program Services. Percent of each service's AQH audience in each VALS, education, or age segment. Programming designed to serve demographically-defined audience segments — Hispanics, blacks, and the elderly for instance — is folded into the “Target” service. Based on 1986 programming.

	Total	ATC	Classical	Drama	Info	Jazz	Kids	ME	Opera	PHC	Target
Need-Driven	2.4	1.7	1.2	.0	1.7	2.9	.0	.7	1.4	1.3	3.6
Survivor	1.9	1.5	.9	.0	1.4	2.2	.0	.6	.7	.9	3.6
Sustainer	.5	.2	.3	.0	.3	.7	.0	.1	.7	.4	.0
Outer-Directed	40.3	35.1	40.1	37.6	38.8	43.4	43.0	36.7	50.8	37.7	45.4
Belonger	13.8	10.1	13.7	10.5	12.6	13.3	11.4	9.9	20.3	11.4	16.6
Emulator	3.0	2.5	2.5	7.3	2.8	3.4	2.5	2.2	2.5	2.4	3.8
Achiever	23.5	22.5	23.9	19.8	23.4	26.7	29.1	24.6	28.0	23.9	25.0
Inner-Directed	57.5	63.2	58.6	62.5	59.6	53.6	57.0	62.5	47.9	61.0	51.0
I Am Me	3.3	3.1	2.3	5.8	3.1	3.6	2.5	2.2	3.3	3.0	7.4
Experiential	7.6	7.4	6.5	8.3	7.6	8.5	12.7	8.5	5.6	6.9	6.1
Societally Conscious	46.6	52.7	49.8	48.4	48.9	41.5	41.8	51.8	39.0	51.1	37.5
Did not Graduate H.S.	2.8	1.9	1.2	5.5	2.0	4.1	1.9	1.1	1.9	1.3	4.5
Graduated High School	9.4	6.8	8.5	6.2	8.4	8.5	11.0	6.4	12.3	6.7	8.7
1-3 Years of College	22.4	19.7	20.4	26.9	22.1	24.2	20.7	21.3	20.7	20.9	23.3
Graduated College	24.7	26.4	25.3	26.7	25.0	25.6	26.8	25.4	26.0	27.3	25.7
Graduate School	40.6	45.2	44.5	35.8	42.5	37.7	40.2	45.7	39.1	44.1	37.9
18-24 Years Old	5.3	5.7	3.6	5.3	5.2	7.0	2.5	4.6	4.8	3.3	7.3
25-34 Years Old	24.6	25.5	21.5	25.0	24.6	25.5	15.2	27.8	8.8	25.4	19.5
35-44 Years Old	24.7	25.6	25.2	25.7	25.7	23.1	36.7	27.9	14.2	25.6	22.8
45-54 Years Old	15.1	15.8	16.2	16.6	15.3	16.2	16.4	14.0	21.0	16.6	19.8
55-64 Years Old	14.0	13.0	14.0	17.4	13.1	14.4	17.7	12.3	19.8	10.7	9.5
65 Years Old or Older	16.4	14.4	19.5	9.9	16.1	13.8	11.4	13.3	31.4	18.4	21.2

This approach yields four distinct types of listeners:

1. *The information-dominant listener* — a person who listens to information programming more than any other format and who listens to an hour or less per week of either classical or jazz. Information-dominant listeners comprise 32 percent of public radio’s weekly audience.

2. *The classical-dominant listener* — a person who listens to classical music programming more than any other format and who listens to an hour or less per week of either information programming or jazz. Classical-dominant listeners comprise 25 percent of public radio’s weekly audience.

3. *The jazz-dominant listener* — a person who listens to jazz programming more than any other format and who listens to an hour or less per week of either information programming or classical music. Jazz-dominant listeners comprise 10 percent of public radio’s weekly audience.

4. *The mixed-format listener* — a person who spends more than an hour per week with two or more formats. Mixed format listeners comprise 24 percent of public radio’s weekly audience.

Ninety-one percent of the listeners in the AUDIENCE 88 sample (accounting for over 97 percent of the listening) fall into one of these four categories.

The following portraits highlight the key findings that emerge from our format-based analysis for each of the four listener types.

Information-Dominant Listeners

Information programming is public radio’s biggest audience draw. The audience is largest when NPR’s news magazines are on the air. The size of the audience is a function of both the news magazines’ inherent appeal and their scheduling during periods of peak radio use.

The appeal of public radio’s information programming, both national and local, is clearly central to the appeal of public radio as a whole. Information-dominant listeners are the largest of the three format-dominant groups.

These Inner-Directed, Societally Conscious people are concentrated in and around the 35-to-44-year-old bracket. They are better educated than their classical- and jazz-dominant counterparts. They are more likely to work full-time. They tend to hold professional, technical, or managerial positions.

With their advanced education and high-level jobs, information listeners are public radio’s most affluent. Their household incomes average 32 percent higher than jazz listeners and 14 percent higher than classical listeners. They characterize themselves as liberal in their political outlook.

Although they have come to public radio more recently than their classical counterparts, these people are active public radio listeners. They tune in to public radio more times per week, on more days, than music-dominant listeners.

Information-dominant listeners spend more time with their public radio station than classical and jazz-dominant listeners, and are more loyal to it. For one-third of the group, public radio is their favorite station.

A slightly greater percentage of information listeners than classical listeners are members of their public radio station; they are much more likely to be members than jazz-dominant listeners.

Classical-Dominant Listeners

Public radio’s classical music is the mainstay of most stations’ daily schedule, accounting for more broadcast hours than any other format. It attracts an audience that is loyal to the station over the course of the week — and that has been loyal to the station over the years.

Classical-dominant listeners are older than listeners to other formats. While they are much more likely than the U.S. population to be Inner-Directed and Societally Conscious, compared to other public radio listeners they are more Outer-Directed, with many falling in the Belonger VALS type. They are well educated, but they have less formal education than information-dominant listeners.

The household income of classical-dominant listeners is about halfway between that of information-

dominant listeners and jazz-dominant listeners; information-dominant listeners are more affluent, and jazz-dominant listeners are less affluent. Classical-dominant listeners are more likely to consider themselves politically conservative.

The classical-dominant listening pattern appears to be one of tuning in to public radio a few times a week and then listening for substantial periods of time. Classical listeners spend less total time with their public radio station than jazz and information-dominant listeners, although they are more loyal to the station than jazz listeners.

They are slightly less likely to be members than information-dominant listeners, but much more likely to be members than jazz-dominant listeners.

Jazz-Dominant Listeners

Jazz is less widely available on public radio than classical and information programming. The national audience is smaller, and findings are more strongly influenced by circumstances of individual stations.

Listeners of all types are concentrated in the audiences of a small number of very successful stations, but the jazz audience is more concentrated than most. Of the 72 stations in the AUDIENCE 88 sample, 6 stations (8 percent) account for 60 percent of the jazz-dominant listeners.

On average, jazz-dominant listeners are younger than information or classical listeners; they are the newest additions to the public radio audience. Like classical listeners, they are decidedly more Outer-Directed than information listeners. Also like classical listeners, there is a substantial complement of Inner-Directed people in the jazz audience. However, Inner-Directed jazz listeners are less likely to be in the Societally Conscious group than their classical counterparts.

Jazz listeners are more likely to be working full-time than classical listeners. While jazz-dominant listeners are more likely to work in professional and technical jobs than any other occupation, they are more likely than other public radio listeners to be found in clerical, crafts, and machine operator positions. They have the lowest household incomes of any public radio group. They describe their

JAZZ NOTES

In studying jazz listeners, we found signs of two distinct groups, one decidedly younger and one older. These two groups become increasingly apparent as we move from cumulative audience to AQH audience to jazz-dominant listeners.

Initially, we speculated that these two groups reflected different kinds of jazz programming on public radio. Younger listeners might tune to more contemporary work and older listeners might search out more traditional fare and “specialty shows” featuring such repertoires as classic jazz, Dixieland, or ragtime.

In fact, the age distinction within the jazz audience is more a matter of the context in which jazz appears on different public radio stations.

Some stations present jazz primarily as a late night or overnight service. During these hours, the radio audience is significantly younger. The audience for any programming aired at this time reflects that.

Stations that present jazz as their full-time music format also capture a younger audience. The listeners that respond to this prominent, consistent presentation probably best reflect the primary appeal of public radio’s jazz programming.

Stations principally identified as news or classical outlets, but which devote a daypart to jazz, almost always the evening hours, attract an older jazz audience. We think this is because a portion of these stations’ loyal core audience, which is shaped primarily by the older appeal of classical music and information, keeps listening, while their fringe listeners, who are younger, are chased away by the change in format.

political outlook as middle of the road.

Jazz listeners are heavy radio users. They use more stations than any other group and use their radios more often. But public radio gets only a portion of their attention. They are the least loyal listeners. They tune in to public radio the least number of times and the least number of days per week. When they do tune, however, they listen for a while. Their average weekly time spent listening is more than classical listeners, but less than information listeners. Jazz-dominant listeners are the least likely to be members.

Race is a significant factor. Compared to other formats, jazz listeners are more likely to be black. One of four jazz-dominant listeners is black; 40 percent of the blacks in the AUDIENCE 88 sample are jazz-dominant listeners.

Mixed-Format Listeners

Mixed-format listeners spend more than an hour per week with two or more of public radio's principal formats.

Although they are defined by *what* they listen to, they are most readily distinguished by *how* they use their public radio station. They tune in often, throughout the week, and spend a great deal of time with the public station. Seventy percent of them are heavy core listeners: public radio is their favorite station — they listen to it more than any other — and they listen a lot.

What formats do these listeners choose? The overwhelming majority, 95 percent, listen to more than an hour of information programming per week (see Graph 31a below).

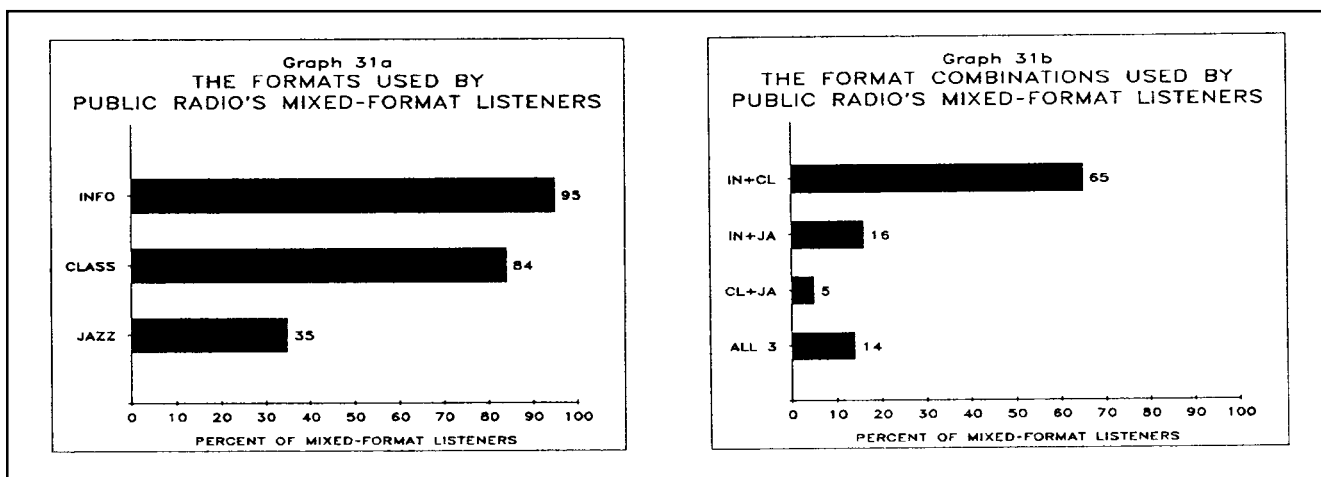
Classical music listening is almost as significant; 84 percent of the mixed-format listeners spend more than an hour per week with classical music.

Jazz listening shows up with what many would consider surprising strength — 35 percent listen to jazz more than an hour per week.

Information and classical music is the most prevalent format combination for these listeners, outstripping others by more than four to one. Interestingly, one in seven mixed-format listeners (3.3 percent of the total audience) listen to more than an hour per week of all three major formats (see Graph 31b).

The difference in *amount* of public radio listening between mixed-format listeners and others is remarkable. Mixed listeners tune to public radio two to three times as often as other listeners. Their listening time averages three to four times greater than other groups. They are two to three times as loyal, in terms of the percentage of the total radio listening time they give to public radio.

Part of the explanation for this usage pattern is definitional. To qualify as an information, classical, or jazz-dominant listener, a person need only listen to one of these formats more than any other. Some of these people may tune to their



public radio station only a few quarter-hours each week. The mixed group, in contrast, listens five quarter-hours or more a week to at least two formats, or a minimum of two and one-half hours total (10 quarter-hours).

What AUDIENCE 88 discovers with mixed-format listeners, however, is something much more than heavy listening.

These are public radio's most Inner-Directed, most Societally Conscious listeners. They are also public radio's best-educated listeners.

A majority of the mixed-format listeners work in professional and technical jobs. Their household income essentially matches that of information listeners, well above both the classical and jazz groups. A majority consider themselves liberal politically — slightly more liberal than information listeners, much more than jazz and classical listeners.

In age, like information listeners, they fall between the younger jazz audience and the older classical audience. They report listening to public radio for more years than any other group (one of the few areas in which they differ from information-dominant listeners).

These listeners believe their public radio station is very important to them and to their community. They are likely to support public radio financially. A majority say they are current members.

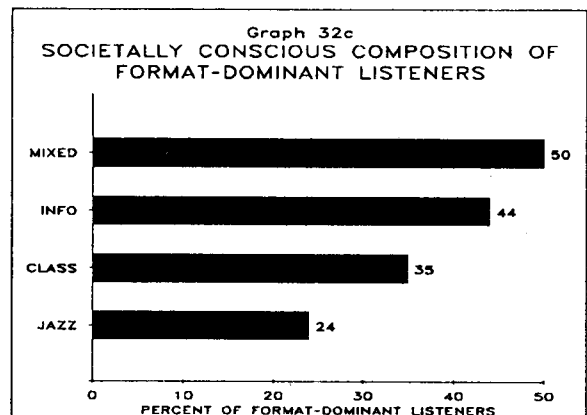
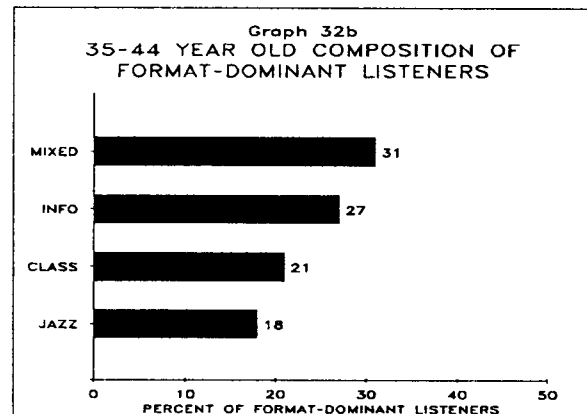
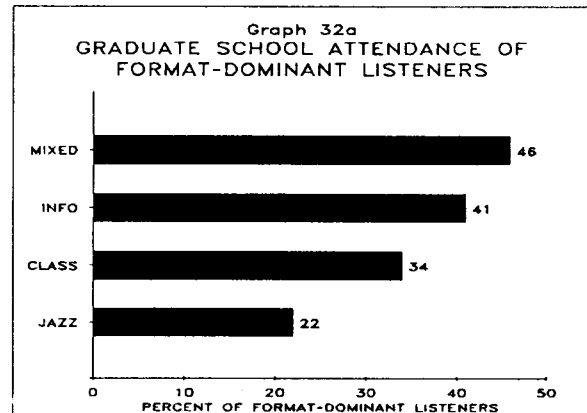
The Audience for Different Formats

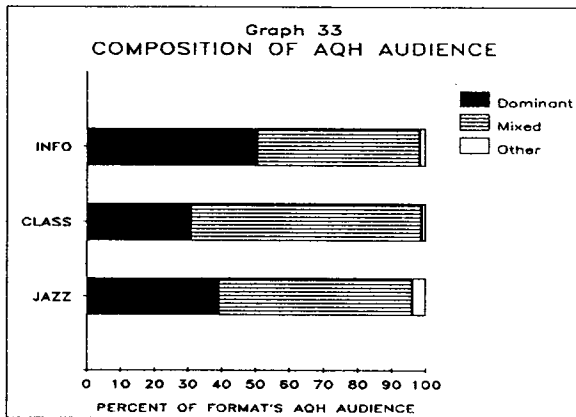
The audience for any given format will consist of all four listener types. Those listeners who are dominant for a format constitute a very large share of the format's audience. Those dominant to other formats are a very small portion.

Mixed-format listeners, with their heavy use of public radio, have a decided impact on the composition of the total audience for each respective format. There are numerous times throughout the broadcast day when a station's audience will consist more of mixed-format listeners than of listeners who are dominant for whatever format is then on the air.

Education, age, and VALS type are the most important factors that separate public radio listeners from nonlisteners, and the listeners to one format from listeners to another.

Mixed-format listeners are at the core of public radio's overall appeal.





What happens when mixed-format listeners are combined with the three format-dominant listener groups described in this section?

Because mixed-format and information-dominant listeners are similar in so many respects, the audience for information programming is the most homogeneous of the audiences for the three major formats. The variations to be found among those listening to information programming are more a matter of distinctions between core and fringe listeners.

A notable statistic emerges when mixed-format listeners who listen to information programming are combined with information-dominant listeners. This group accounts for 87 percent of all who listen to information programming (cumulative audience), and 98 percent of all listening (AQH) to this format. Yet a majority, 59 percent of this group, spend less than an hour each week with either classical music or jazz — they seem to find most of their music somewhere other than on public radio.

When we examine the audience for classical music, there are important differences between the classical-dominant group and the mixed-format listeners who listen to classical music. The classical-dominant listeners are older than the mixed-format listeners, more Outer-Directed, consider themselves

more conservative, and are slightly less educated and less affluent. Mixed-format listeners who include classical music as one of their formats are younger, more Inner-Directed, somewhat better educated, and better off financially. These two groups account for 99 percent of all classical listening.

There is a similar division between jazz-dominant listeners and mixed-format listeners who listen to jazz. Those who stick to jazz are more Outer-Directed, more conservative, less educated, less affluent, and younger. Mixed-format listeners who listen to jazz are more Inner-Directed, more liberal, better educated, and more affluent.

The Importance of Mixed-Format Listeners

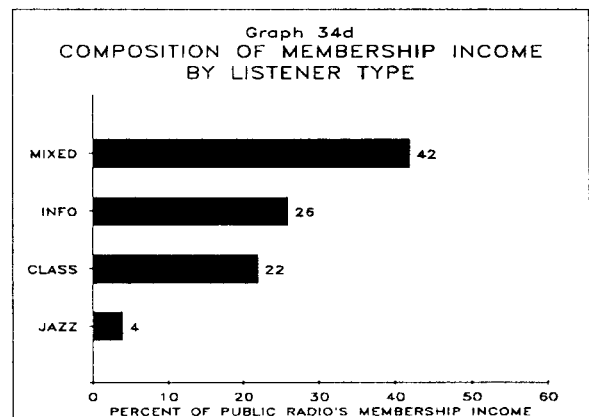
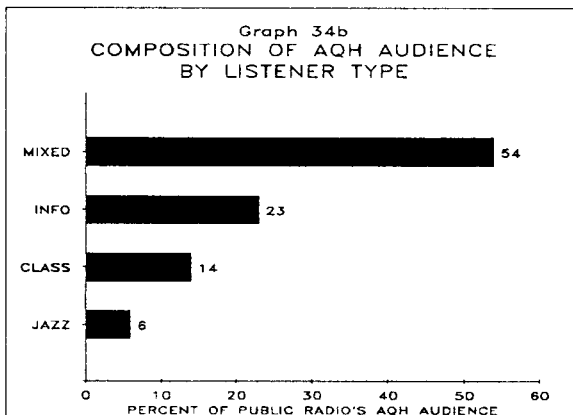
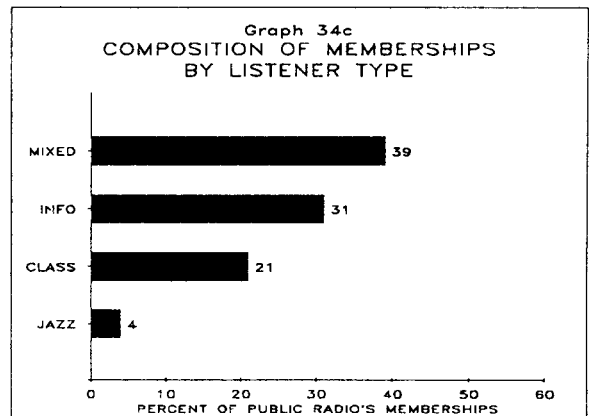
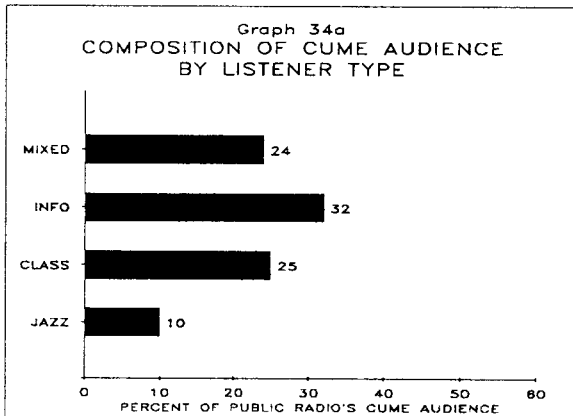
In summary, mixed-format listeners are significantly different from all three format-dominant groups in station listening time, station loyalty, the number of days the station is used, the number of times the station is tuned, advanced education, professional or technical occupations, station membership, and the degree to which they believe the station to be personally important to them. This is the group of radio listeners for whom public radio provides an especially significant service — a mix of information and music programming that most prefer to that presented on any other radio station. This analysis underscores the importance of the listener who enjoys more than one of public radio's formats. Public radio's strongest audience appeal appears to transcend genre. It may in fact be dependent on such transcendence.

This discovery is exciting because it encourages public radio to consider the many possibilities of successful programming combinations. It may be one of the first times that audience research has encouraged public radio to consider the importance of programming diversity. The notion of appeal affinity among different programming elements is a spur to creative thinking about programming.

AUDIENCE AND MEMBERSHIP BY LISTENER TYPE

The graphs below (34a and 34b) illustrate the contribution of different listener types to public radio's cumulative audience and AQH audience. Mixed-format listeners are 24 percent of all listeners, but they account for 54 percent of all listening.

These graphs (34c and 34d) show the comparative role of each listener type with respect to membership and membership income.



DIFFERENT VIEWS OF APPEAL

The charts on these two pages illustrate different ways of analyzing public radio's appeal.

Each horizontal row represents one of public radio's three dominant formats — information, classical music, and jazz.

Vertical columns present characteristics selected from one of the three variables AUDIENCE 88 finds especially powerful in understanding public radio listening — education, age, and values and lifestyle.

Within each chart, each bar represents a measurement of a format's audience using one of four techniques described below.

- Striped bars are based on all the listeners for the particular format.

The top bar is the cumulative audience (cume) for the format. Each listener is counted once, regardless of how much time is spent listening.

The second bar is the average quarter hour (AQH) audience for the format, a snapshot of the audience listening at any one time.

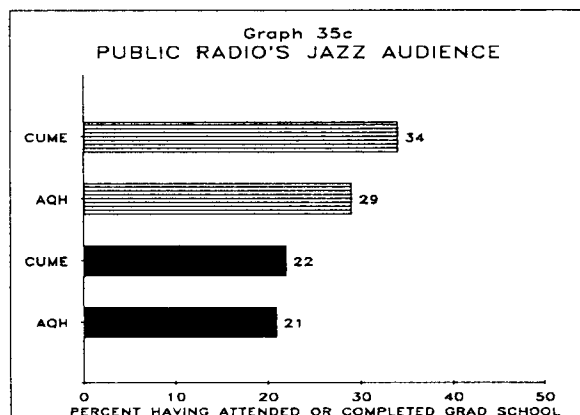
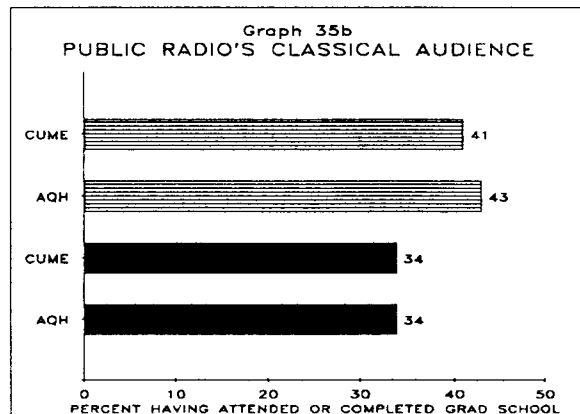
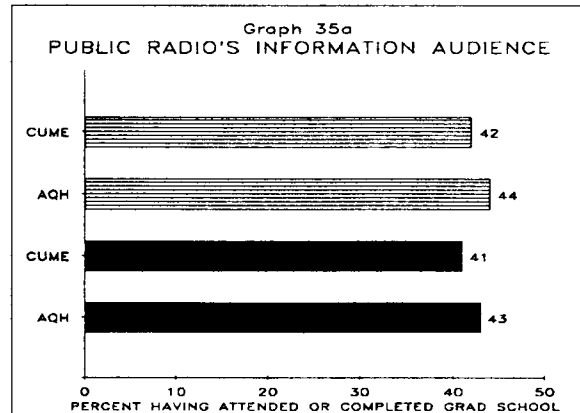
- Solid bars represent format-dominant listeners only — those who listen to the indicated format more than an hour a week and do not listen to any other format for more than an hour.

The third bar is the cumulative audience of format-dominant listeners.

The bottom bar is the AQH audience of format-dominant listeners.

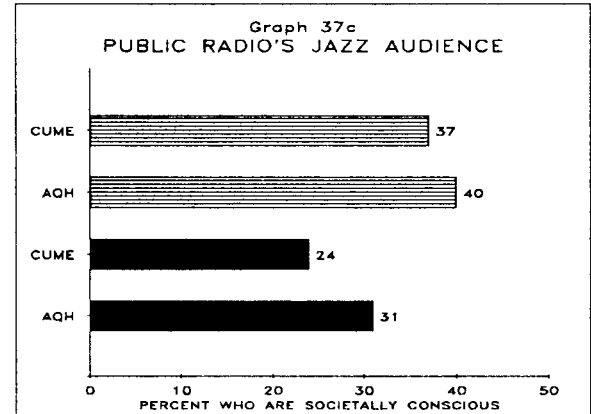
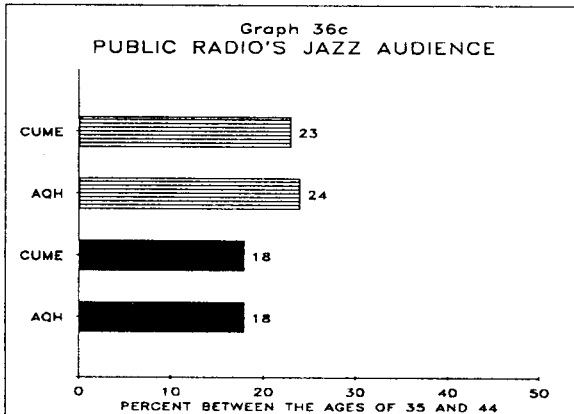
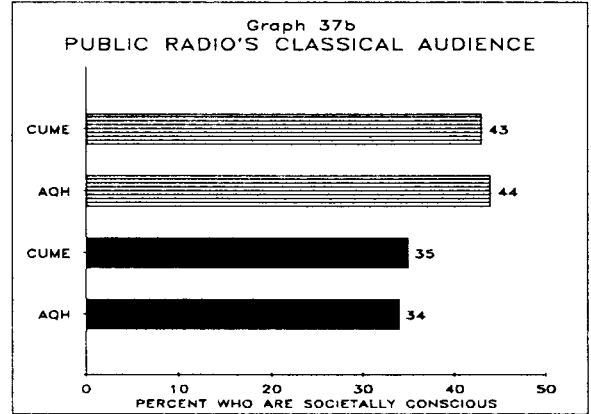
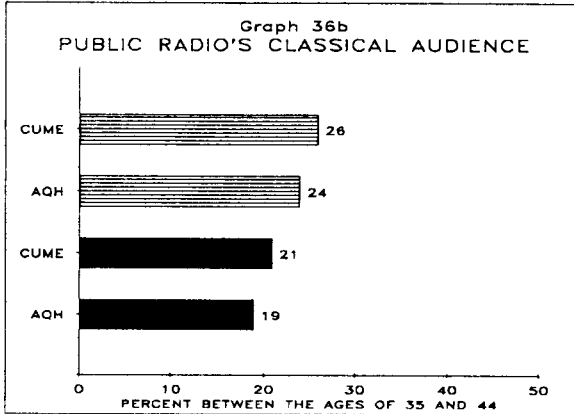
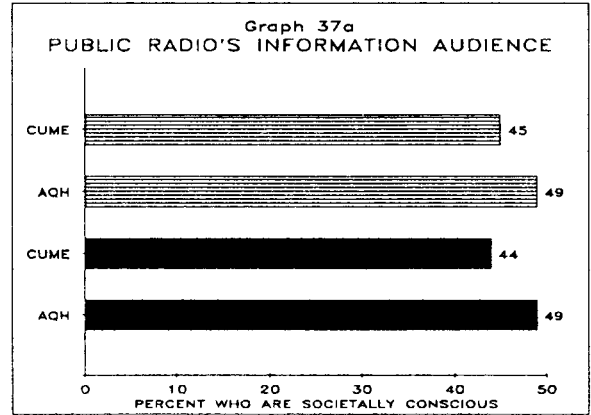
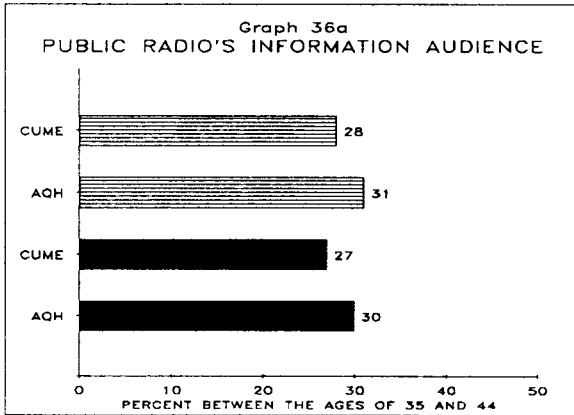
Each method gives us different information about a format's audience. Moving from top to bottom in each chart, we get closer to the heart of a format's appeal — or lack of appeal — to people with the indicated characteristic.

GRADUATE SCHOOL ATTENDANCE



35-TO-44-YEAR-OLDS

SOCIETALLY CONSCIOUS VALS TYPE



THREE LISTENER TYPES

AUDIENCE 88's data provides an exceptional portrait of public radio's appeal, but it still stops short of the underlying patterns that would explain the ebbs and flows of listening. Here is one speculative model that makes some sense.

We have hypothesized three kinds of public radio listener, which, drawn broadly, are as follows:

Type A Inner-Directed, Societally Conscious
Age 35-55
Attended graduate school
Politically liberal
Works as a professional
Household income of \$50,000

Type B Outer-Directed, Achiever or Belonger
Age 55+
Graduated from college
Politically conservative
Works as an administrator
Household income of \$40,000

Type C Outer-Directed, Achiever or Belonger
Age 25-35
Attended college for 3 years
Politically middle-of-the road
Works in clerical position
Household income of \$30,000

Type A listeners integrate public radio into the eclectic aesthetic of their lives — at home, at work, and in between. Public radio provides a sense of engagement and connectedness to cultural and political life. It is a stimulating and enjoyable continuing education for this intellectual elite. They are a large segment of public radio's information audience, and form a significant portion of both the classical and jazz audiences. They may have come to public radio for *All Things Considered*, but they spent a lot of Saturday nights with *A Prairie Home Companion*. They are probably a third of public radio's cumulative audience, and easily account for two thirds of public radio listening. In fact, the majority of those listening at any one time are typically Type A. With their affluence,

they can afford to pay for this service they value. They probably contribute over three-fourths of public radio's financial support.

Type B listeners make public radio's music a comfortable part of their environment, with much of their listening done at home. Their musical tastes are mature and outside the mainstream of popular culture. They find public radio a welcome oasis of quality on the airwaves. More Type B listeners tune in to classical music over the course of a week than any other type. Because Type B listeners do not tune in as often as their Type A counterparts, however, there are likely to be more Type A listeners in the classical audience at any one time. Type B listeners constitute a significant block of public radio's jazz listeners, although they are sometimes outnumbered by Type C listeners in the jazz audience, especially late at night. These listeners are not especially fond of public radio's information programming — perhaps they find it too intrusive, too earnest, or too liberal — and many actively avoid it. Type Bs who like classical music generally do not listen to jazz, and vice versa. They probably contribute 20 percent of public radio's member support.

Type C listeners find public radio a sophisticated alternative in their multistation listening repertoire. These younger listeners are still shaping their tastes and lifestyle, experimenting with culture and ideas. They come to public radio mostly for the music, especially for jazz, but occasionally give the news a listen too. They form a substantial portion of the total jazz audience, especially for more contemporary works. They are a smaller portion of the information and classical audiences. Type C listeners are not particularly loyal to public radio, which gets a relatively small percentage of their radio time, but they aren't especially loyal to other stations either. They use more stations per week than any other listener type. Their use of public radio's services is too light for them to consider it very important. That fact, together with their lower incomes, translates to a very low level of financial support.

4.

AUDIENCE BUILDING

A careful evaluation of public radio's audience-doubling goal indicates that the target is difficult but appears to be feasible. The prospects for audience doubling for individual stations, however, will vary substantially, depending on their specific programming and the presence in their markets of the kinds of people to whom public radio most appeals. Successful strategies will require hard choices about what to program for whom.

In 1984, National Public Radio adopted a goal of doubling the average quarter hour (AQH) audience for NPR member stations over a five-year period. Other public radio organizations endorsed the goal.

Almost five years later the public radio system as a whole remains broadly committed to increasing audience service. Yet aside from a few bright spots for individual stations and some national programs, the audience-doubling goal has proved more elusive than many had hoped. NPR reported in October 1988 that the AQH audience for NPR members had grown by 26 percent and the cumulative audience by 30 percent. With the progress already accomplished, achieving the audience-doubling goal will require a 60 percent increase in the current AQH audience.

Moreover, much of the audience growth that public radio has realized over the past four years occurred from 1984 to 1986. In the 1986 to 1988 period, AQH audience for NPR members, who generate over 90 percent of the audience for all public radio, increased by less than 2 percent.

Some have suggested that the audience-doubling target may be unrealistic, and that public radio, especially in some communities, may have already realized close to its maximum potential. A number of managers and programmers have argued that audience doubling, however worthwhile at a general level, has not been sufficiently infused with a sense of strategic direction for action, and that the goal was adopted more on hope and faith than any detailed analysis of current and prospective service.

In this section, we first apply AUDIENCE 88's findings to the feasibility of audience-doubling. We then review strategies for reaching the goal.

AUDIENCE DOUBLING: REALISTIC GOAL?

The major federal investment in station facilities and operations throughout the 1970's and early 1980's fostered some 300 professionally staffed stations providing a signal to almost 90 percent of the American population. The accompanying multi-million dollar investment in National Public Radio enabled stations to complement their local efforts with high-quality national programs, producing a unique mix of information and music programming.

In the early 1980's, public radio sought to improve the efficiency of these facilities and programming investments through increasing listeners' use of its services. The focus of these efforts was the form of presentation — more effective scheduling, fewer abrupt program changes, more on-air promotion, improved announcing techniques, and better design of national programs. The goal was to make public radio's quality programming more accessible to listeners.

By 1984, however, public radio's attention was centered elsewhere. The public radio system was reeling from NPR's financial crisis and cutbacks in federal funding. Stations were divided on many issues, national organizations were at odds, and

national attention was principally focused on financial and structural concerns.

In this adverse climate, a campaign to double the audience was an attractive, unifying rallying point for the system, with the special benefit of refocusing attention on programming and service.

In the years since the audience-doubling goal was adopted, public radio's fortunes have improved markedly. Federal support is at an all-time high. A restructured National Public Radio is stronger than ever. American Public Radio, new producers, and new programs have established themselves in the national program marketplace. But the system seems to be floundering in its pursuit of listeners.

At the broadest level, it might be asked whether public radio can double its audience service by any means, including substantial changes in its programming. AUDIENCE 88, which studies only public radio's current programming, cannot answer that question. In any event, audience doubling proponents have not encouraged the pursuit of listeners "by any means necessary," but rather an effort to increase use of the kinds of formats and programming public stations already provide.

In a more focused context, then, the question is whether public radio has legitimate prospects for significantly increasing the use of programming with essentially the same appeal as that now presented. To state the issue more precisely, is it feasible to:

- Increase the number of public radio *listeners*?
- Increase the average amount of *listening* to public radio by current and new listeners?
- Do both to the extent that the combined impact is to double public radio's 1984 listening?

It is important to recognize the role of growth in *both* listeners and listening. It might be possible to double public radio's AQH audience by simply doubling the number of people who listen if one assumes that the new listeners would listen as much as current listeners. It also might be possible to get all current listeners to listen twice as much. The more powerful and realistic strategy, however, incorporates both dimensions of audience growth.

Finding Listeners

AUDIENCE 88 demonstrates that particular kinds of programming appeal to particular kinds of people. 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.

Public radio's capacity to increase its present audience by 60 percent — the amount needed to reach the audience-doubling goal — is limited by the overall size of the constituencies for whom it has the greatest appeal, the extent to which members of those segments now listen, and the maximum possible reach within such segments.

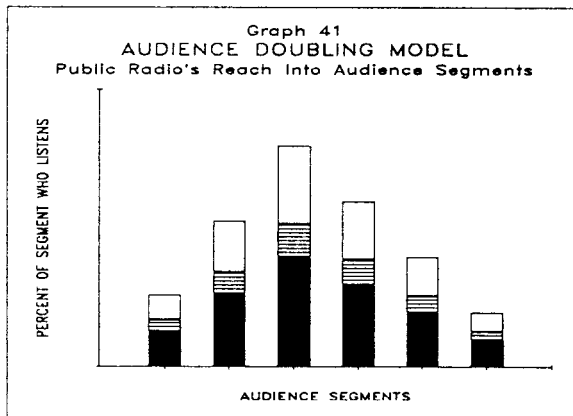
Given the appeal of current public radio programming, the most likely new listener for most stations is a highly educated, Societally Conscious person in the 35-to-44 age bracket. The further one drifts from this overlapping configuration, the less likely one is to find a new listener. The question, 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.

As "Raising the Curve" makes clear, public radio has real opportunities for greater reach and real constraints, both shaped by programming appeal.

RAISING THE CURVE

The chart below illustrates how audience growth plays out across audience segments. The black portion of each bar represents public radio's 1984 audience, the shaded area is the growth from 1984 to 1988, and the white area is the additional growth required to meet the audience doubling goal.



Segments of peak appeal provide the largest number of new listeners and the greatest constraint on growth. Growth in these prime segments must be accompanied by growth in all other segments as well.

How does this model play out with respect to those factors that are most useful for understanding the public radio audience?

AUDIENCE 88 affirms earlier findings that education is the most powerful predictor — the more education people have, the more likely they are to listen to public radio.

The peak of public radio's education appeal is to people who have pursued their education beyond a college degree. AUDIENCE 88 reports that 38 percent of public radio's audience have attended graduate school — a third of all Americans who have attained this level of education. A 60 percent increase in the reach into this highly educated

segment — the increase over current listening required to meet the audience-doubling goal — would require public radio to serve, each week, 53 percent of all Americans who have gone to graduate school. Is this possible, too modest, or too ambitious?

Age is one of the most widely used factors in commercial radio targeting — what are the possibilities for public radio? Public radio currently has more listeners in the 35-to-44-year-old bracket than any other — one in four public radio listeners. This reflects both the size of this age group, swelled by the baby boom, and public radio's strong appeal to these listeners.

Public radio currently reaches 8 percent of all Americans in the 35-to-44 age bracket each week. To reach the audience-doubling goal, public radio would need to reach about 13 percent of the people in this age bracket. Is this possible? It is important to be realistic; this group is aggressively pursued by many commercial broadcasters.

What about Societally Conscious listeners, the VALS type that constitutes 42 percent of the public radio audience? About 20 percent of Societally Conscious people now listen to public radio, and for every one Societally Conscious person who listens to public radio, there are four who do not. To reach the audience-doubling goal, public radio would need to reach one of every three Societally Conscious Americans.

Summarizing the calculations above, realization of the audience-doubling goal, on the basis on new listeners alone, would require a reach of 13 percent of 35-to-44-year-olds, 53 percent of people who have pursued their education beyond college, and 32 percent of all Societally Conscious people.

How realistic are these targets — and for which segment does the necessary reach pose the greatest problem?

Encouraging More Listening

The foregoing discussion is framed in terms of reaching the audience-doubling goal entirely through increasing the number of listeners. As we stated at the outset, however, it is equally important to explore increasing the average amount of listening done by existing and future listeners.

As noted above, average public radio listeners spend a little less than 8 hours per week with their public radio station. This is less than the time listeners spend with the average commercial radio station. According to *American Radio*, by James Duncan, Jr., commercial stations that present the major adult radio formats generate average weekly listening times in the range of 9 to 12 hours per week.

The difference in listening time is not because public radio listeners spend less time with their radios. In fact, public radio listeners spend over 11 percent *more* time listening to radio than the average radio listener — they just spend less time with *public* radio.

The higher average listening times achieved by various commercial formats establish important points of reference for public stations. The highest listening levels for commercial stations, such as the 11.4 hours per week Duncan's *American Radio*

THE DELAYED PAYOFF

Even if public radio can reach a significant number of new listeners, such growth will not immediately bring a proportionate increase in listening. Average public radio listeners spend a little less than eight hours per week with their public radio station. During their first two years of listening, though, average listeners tune in only six hours per week.

As a consequence, any growth in cumulative audience must be initially discounted by as much as 25 percent in terms of the contribution to AQH audience. A station experiencing a 50 percent growth in the cumulative audience might see a 38 percent increase in listening, or AQH audience.

reports for black/urban formats in 1988, or the 11.2 hours per week for beautiful music/easy listening formats, might be seen as a theoretical maximum for public radio. These listening levels would represent an increase for public radio of over 45 percent and are probably unattainable given the nature of current programming on most stations.

Public radio might more realistically look toward the time-spent-listening figures generated at the lower end of the major commercial formats. For example, the average listener for stations broadcasting adult contemporary, contemporary hit radio, and album-oriented rock formats spends between 8.6 and 9.5 hours with the station per week. If public radio could achieve these levels, it would translate to a 15 to 20 percent increase in listening.

Where will increased listening time for public radio stations come from? It will come from listening that people are currently giving to other radio stations. Only the most extraordinary programming, such as *A Prairie Home Companion* at its peak, will change a person's general listening habits and increase the overall amount of time a person spends listening to radio. For the most part, building time spent listening is a matter of increasing the percentage of all radio listening that people give to their public radio station — that is, their loyalty to public radio.

The focus for increasing listening, as for increasing listeners, should ultimately be on those audience segments for which public radio has its strongest demonstrated appeal. At a very sophisticated level of analysis, going well beyond AUDIENCE 88, it would be possible to establish listening benchmarks and targets for specific audience segments.

Combining Listeners and Listening

By considering potential progress in time spent listening, we might reduce somewhat the reach into primary audience segments needed to achieve audience doubling. For example, if public radio could increase average listening time by 15 percent, the additional listeners needed to meet the goal would be about 40 percent above current levels. This compares to the 60 percent increase in listeners required to double AQH audience solely on the basis of new listeners.

A 15 percent increase in average listening time is the equivalent of about 70 minutes of additional listening per week. To put that figure in perspective, a 70-minute increase would mean about 1 more listening occasion per listener per week.

Recalculating the figures needed to attain this increase, public radio would need to reach 11 percent of 35-to-44-year-olds, 46 percent of people who pursued their education beyond college, and 28 percent of all Societally Conscious people.

This is not the only model, of course. There are numerous possible combinations of growth in listeners and listening that will yield similar results.

These targets, both for increasing time spent listening and for reach into specific audience segments, are ambitious but not impossible. AUDIENCE 88 data suggest that the audience doubling goal is realistic but that achieving it with programming that matches current appeal will be difficult.

AUDIENCE-BUILDING STRATEGIES

Our examination of potential audience growth for public radio should lead to more specific discussions of who will constitute public radio's future listening audience. Our discussion of the differences among stations and markets may focus attention on the need for more precise translation of national goals to local targets. The fact remains, however, that significant audience growth will require the design and energetic implementation of carefully developed, action-oriented strategies, both for individual stations and the system as a whole.

AUDIENCE 88 does not chart a clear path to a larger audience for public radio. The study is a snapshot, an assessment of the public radio audience at a single point in time. The study does not track how programming and audience have evolved and grown over the years. However, the wealth and depth of the data allow us to theorize with some certainty about the effect certain programming strategies will have on audience growth.

AUDIENCE 88's fundamental notion is appeal — the critical linkage between programming and audi-

ence. Different kinds of programming appeal to different kinds of people; the appeal of a station's programming causes and defines its audience; and through decisions about content, form, and style, all of which shape programming's appeal, a station will shape its audience.

To apply this notion to the audience-building challenge, public radio must devise ways to strengthen its appeal, to become more appealing to more people. At bottom, these various programming approaches reduce to a critical strategic choice.

- Should a station *diversify* its appeal and provide programming for two or more relatively distinct constituencies?
- Should a station *unify* its appeal, increasing its reach into and use by a particular audience segment?

Diverse Appeal

The theory of diverse appeal is that distinct programming streams will serve distinct audience segments, allowing a single station to serve diverse elements of its community. Listeners will seek out the programming intended for them, and perhaps appreciate some exposure to other programming as well. While listeners will encounter periods of time when the station is programming for someone else, they will accept this as the trade-off for the special and unique service public radio offers them.

The principal rationale for this approach is that public radio has a public service responsibility to provide certain kinds of programming that are unavailable on other stations. Typically it is determined that some kinds of programming, such as jazz, classical music, or drama, have an inherently superior value relative to other kinds of programming. A public radio station, it is argued, should assure that such programming is available. The result, many believe, will be two or more loyal audiences for whom the station is important as the only source for certain programming.

This approach characterizes the programming of many public radio stations today. Indeed, even those stations that confine their programming to public radio's traditional, mainstream formats are

THE LOCAL CONTEXT

A station's capacity for audience growth reflects a variety of local circumstances, including the number of people within its signal area, the composition of the community with respect to those groups for which its programming has a strong appeal, the size of its current audience, and the effectiveness of its own efforts.

The size of a station's audience is more a function of the number of people within the station's signal area than any other factor. The largest 10 markets account for 33 percent of the population and 31 percent of public radio's national audience. The top 25 markets account for 51 percent of the population and 53 percent of public radio listeners. Success in attaining national goals obviously turns on the performance of a short list of stations in major markets.

Market size is only a part of the picture, though. National Public Radio's *State of the Audience* report (January 1988) compared the largest 25 radio markets in population size to the top 25 markets for NPR listeners. Several markets have significantly more public radio listeners than one would predict on market size alone. Minneapolis-St. Paul, for example, is the 14th largest market, but ranks 5th in NPR listeners. Denver is the 19th market in size, but 8th in number of NPR listeners.

AUDIENCE 88 explains some of these market-by-market differences. The kinds of people most attracted to public radio programming are not uniformly distributed throughout the country, but are found in high proportions in some communities and smaller proportions elsewhere.

Communities with high concentrations of the demographic and psychographic segments for which public radio programming has its strongest appeal are fertile areas for audience growth. Those communities where such segments are proportionally smaller will prove more difficult.

Education is our recurring focal point of public radio appeal. Two-thirds of the public radio audience completed college, compared to only one in five of all Americans over the age of 18. A community in which 25 or 30 percent of the population over 18 years of age completed college has much more potential for public radio than a community with only 15 percent college graduates.

The Societally Conscious VALS type is also not uniformly distributed geographically. Societally Conscious persons are overrepresented in the Northeast and on the West Coast, and are underrepresented in the South and Midwest.

AUDIENCE 88 also highlights the different appeal of different formats. A logical extension is that the importance of various population segments will vary from station to station, depending on each station's program mix. Stations that present relatively little information programming may need to focus more on the number of VALS Achiever or Belonger types in the community, rather than Societally Conscious listeners. Similarly, jazz stations might pay more attention to younger age brackets than other public stations.

Finally, there is the question of how much progress a station has already made toward realizing its full audience service potential. It is only common sense that stations that have already achieved considerable audience success will have a harder time doubling their audience than those stations that are just starting their audience-building efforts.

But even here there are exceptions. The Radio Research Consortium publishes an Honor Roll of stations "on schedule" in meeting the audience-doubling goal. Of 41 stations on the Honor Roll in 1988, 6 had been ranked at the top end of their market size group in AQH audience at the *beginning* of the audience-doubling period. These stations started out strong, and have become even stronger.

presenting programming of more diverse appeal than they may have imagined. As Section 3 illustrated, there are important distinctions in the appeal of each public radio programming element.

AUDIENCE 88 data suggest that the diverse-appeal approach undercuts listener satisfaction and may reduce both the number of listeners and the level of listener support.

AUDIENCE 88 finds that public radio listeners consider a station personally important in direct relationship to the extent they use it. They also consider a station important to their community in direct relationship to the extent they use it. And their willingness to support a station financially is directly tied to their use of it. *For public radio listeners, the importance of a station's service is tied to use, above and beyond any other factor.*

To the extent that a strategy of diverse appeal places obstacles to personal use of a station — and it clearly does — such a strategy works against the objectives of importance and financial strength.

The approach of serving two or more constituencies works well for many businesses and public service enterprises, from grocery stores to universities to museums. A grocery store may have its discount aisle and its gourmet section. A university can appeal to different students by scheduling a variety of classes at the same time. A museum can attract a variety of patrons with different exhibits in different galleries. All of these entities have the capacity to produce different appeals *simultaneously*.

A radio station, in contrast, can only be one thing at any one time. If the programming fails to appeal to a listener, there is no other aisle, class, or gallery available — there are only other stations.

American radio broadcasters have responded to this phenomenon with programming strategies principally based on consistent, reliable appeal. Each station seeks to fill a distinct service niche in the radio marketplace. Radio listeners can expect, and have come to rely upon, such consistency of service.

Most commercial stations maintain this consistency of appeal even when they “break format,” as in morning drive-time shows with a different sound than the remainder of their day. Such scheduling

is done on a calculated basis in a manner designed to maximize audience. The sound is adjusted by daypart to reflect the pace of their listeners' lives. The target listeners, and the underlying appeal, rarely change.

Historically, public radio has made dramatic shifts in appeal throughout the week, over the course of a day, and often within individual dayparts. While stations have moved closer to the presentation of programming with consistent appeal, the typical public radio station continues to broadcast to two or more distinct audiences. The timing of these appeal shifts are often determined by convenience, program feed schedules, the availability of staff and volunteers, and what “feels right.” They are often made without the benefit of (and sometimes with disregard for) audience research.

As a result, public radio frequently positions itself as an anomaly in the marketplace. Getting listeners to tune in at specific times for specific programming is very difficult. Most radio listeners tune in when it is convenient to do so. Exceptional programs occasionally generate a substantial tune-in audience, but they are few and far between.

How does this square with AUDIENCE 88's finding that mixed-format listeners are among those who most enjoy and value public radio?

The existence of the mixed-format listener does not speak to the success of the diverse-appeal approach as outlined here. Mixed-format listeners are not the diversity of constituencies at which diverse programming is theoretically aimed. They are actually a relatively homogenous group of listeners who find more than one of public radio's formats appealing.

Our format analysis explored the three dominant formats on public radio — information, classical music, and jazz — not the full range of public radio programming. Only 14 percent of the mixed-format group uses all three of these principal formats; most use just two. Over 80 percent of the group is essentially a “news and something else” audience.

The theory of diverse programming serving diverse constituencies, all on the same station, rarely works. Public radio stations will serve more people, and serve them better, with a different approach.

Unified Appeal

The theory of unified appeal is that consistent reliable service to a particular audience segment will result in a more satisfying and important service for the listeners who use it and that a greater number of people are likely to listen. People will tune in and out as their lifestyle permits. Once they have tuned in, programming will not change appeal and cause them to tune away. The station will be constantly accessible to its consistent audience.

The principal rationale for this approach is to achieve a maximum level of satisfaction, significance, and personal importance among those who listen to public radio. Proponents of this strategy suggest that it will attract more listeners who will listen more often for longer periods of time and that these listeners will be more likely to support public radio financially.

AUDIENCE 88 findings suggest that programming with unified appeal will enhance most public radio stations' prospects for audience growth, while still accommodating a surprising diversity of content.

The strategy of unified programming appeal requires an explicit organizational decision to focus on a particular group of listeners and to make all programming decisions based on the needs and interests of that audience segment. A major difficulty in implementing this approach is that many stations will find it difficult to maintain a consistent appeal while fulfilling the often diverse demands of their organizational mission.

The explicit articulation of which audience the station will serve, with the implicit corollary of which audiences it will not, is certain to provoke ongoing questions about the appropriateness of the choice. This questioning will come from many quarters: parent institutions that hold the license of many stations, the political arena, community groups, station staff, board members, and volunteers — all of whom share a very natural tendency to expect the stations to do just a few more things for just a few more people.

The difficulty comes in structuring such discussions in a rational and productive manner and communicating the intricacies of how radio works to commu-

nity members, friends, and supporters who are unfamiliar with such terrain. The unified-appeal strategy is likely to place more demands on professional station leadership than other strategies.

Even when the programming direction is clear, achieving a unified programming appeal is more difficult than it appears at first blush. The radio marketplace is dominated by stations that unify their appeal primarily through the nearly exclusive use of a single programming genre — one kind of music, all the time, or the all news/talk station. This single-genre approach is also the most prevalent approach to unified appeal within public radio.

Despite the apparent continuity, airing the exact same programming throughout the broadcast day does not guarantee a consistent appeal for a particular audience segment. In fact, it may have just the opposite effect for the kind of listeners for whom public radio now has its greatest appeal.

For instance, public radio's information programs may work well when listeners can give them close attention, but not when these same listeners must concentrate on personal and professional demands and responsibilities.

Further, it is not at all obvious how various programming elements may unite into a single strand of appeal. *A Prairie Home Companion* presented an eclectic mix of music, poetry, readings, and drama to public radio's listeners — tied together by a unifying aesthetic sensibility and the powerful appeal of the program's remarkable host. And interestingly enough, the audience segment to which *A Prairie Home Companion* appealed most strongly consisted of precisely the kinds of people most strongly attracted to public radio's news and information programming. We can see and measure that in retrospect, but how does one anticipate it?

The pursuit of a unified programming appeal composed of diverse programming elements is full of temptation for personal indulgence — the "I like it, they'll like it" school of broadcasting. It takes individuals of genuine talent and discipline to design and implement such programming.

Programming with unified appeal holds the prospect of increasing public radio's audience service, as measured by use, importance, and financial support.

5. TARGETING

Public radio must be clear about whom it intends to serve. Programming goals have traditionally been set in terms of content, but they increasingly incorporate audience-oriented factors. Stations can use AUDIENCE 88's findings about programming appeal both to understand the targets of content-based program decisions and to design appeal-based program strategies.

If audience appeal is this study's most powerful concept, audience targeting is its most provocative issue. Once the question of who is served by public radio is opened, so too is the question of who should be served.

Public radio stations are created for complex reasons and to achieve diverse objectives. The potpourri of purposes, goals, responsibilities, and rationales for continued existence and public support that guide a station's management is generally termed the station's mission.

For much of their history, public radio stations defined their mission in terms that were highly idealistic, broadly inclusive, frequently paternalistic, and often naive with respect to the opportunities and limits of radio broadcasting. Most stations' missions were, at bottom, only vague directives for actual operations, seldom translated into measurable standards suitable for performance evaluation. As audience researcher Tom Church put it, many stations could fulfill their mission without so much as a single person ever listening.

This situation began to change in the early 1980's, influenced by audience research, stations' growing reliance on listeners' financial support, and practical experience.

It was increasingly clear that some forms of presentation encouraged listening while others did not; that some approaches to scheduling promoted listener loyalty while others turned away even ardent supporters; that some programs stimulated generous contributions while others were left begging.

As managers and programmers gained a more sophisticated understanding of how the radio medium works and more accurate information about the audience effects of their various efforts, many stations reconsidered their mission, goals, and objectives.

Stations eliminated some elements of their mission out of recognition that they were in conflict with other, more important purposes or not well suited to pursuit through the radio medium. They defined goals more carefully, often in narrower terms. They articulated programming objectives with greater precision, in more quantitative, measurable terms. This refinement of mission, goals, and objectives enhanced their relevance and importance for day-to-day operations. Although the rhetoric was often less ambitious, the impact was generally more profound.

Some watched these developments with alarm, concerned that efforts to fine-tune mission, schedule, and presentation were leading stations away from basic social and cultural commitments that underpin public radio's service. The fear, in many cases justified, was that too much emphasis on form and focus was eliminating drama, documentaries, specialized audience programming, full-length concerts, and other traditional hallmarks of public radio.

As these changes played out, public radio experienced a period of sustained and substantial growth in the size of its audience and the level of its nonfederal financial support. Many factors were at work, including the development of new stations, improved signals, and the introduction of new

national programming such as *Morning Edition* and *A Prairie Home Companion*. But most observers attribute a significant role to the system's greater awareness of its audience and greater discipline about mission.

The "mission versus audience" conflict is increasingly seen as a false dichotomy. Instead, audience goals and a sensitivity to the audience consequences of programming decisions are more and more viewed as *components* of a station's mission, goals, and objectives — components that compete for attention and priority with other, more traditional concerns.

Virtually all public radio stations pursue missions that clearly set them apart from other radio broadcasters. A public radio station *sounds* different, and the reason, more often than not, has to do with the station's mission. Today, because of greater attention to the needs and interests of the audience, thousands more Americans can hear that difference every week.

We have reviewed the evolution in thinking about mission and audience because we believe AUDIENCE 88 introduces a new round of strategic issues for public radio that extend and refine this recent debate.

AUDIENCE 88 centers the discussion on the questions of *what service* we choose to deliver and *to whom* we intend to deliver it. As Chapters 2 and 3 make clear, the two questions are inextricably linked.

If the controversy of the mission-versus-audience dialogue can be simplified as sometimes difficult choices between *content* and *numbers* of listeners, the extension of that dialogue, informed by AUDIENCE 88, is of further choices between *content* and *kinds* of listeners.

This examination of choices will begin with a discussion of how the current public radio audience has come to be. We will then review approaches to audience targeting available to stations and the public radio system, ranging from continuation of decisions principally based on content to strategies more closely keyed to audience appeal. We will discuss how AUDIENCE 88 can advance the pursuit of both these options.

Programming Defines the Audience

Public radio has been guided from the outset 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. For many in public radio, mission has simply been shorthand for these content commitments.

With only a few exceptions, most notably the system's minority-oriented stations, *who* is being served has not been a part of stations' missions. Even as programmers have become more conscious of audience-related factors, 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.

AUDIENCE 88 demonstrates, however, that 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 listener response that AUDIENCE 88 is now reporting.

What we see is the audience that 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. Public radio was built on a foundation of stations licensed to educational institutions and staffed by people drawn to such institutions. Journalism, music, and cultural choices have been filtered 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 colleges and universities have been indelibly imprinted on the resulting service.

Stations that qualify for annual support from the Corporation for Public Broadcasting today are a more diverse group, including many stations held by community groups, and a small number of outlets controlled by, and designed to serve, minorities. Even so, the system as a whole remains steeped in its educational heritage. AUDIENCE 88's database, drawn to reflect National Public Radio's membership, tilts slightly more in this direction than public radio as a whole (see "Whose Audience," p. 6).

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.

Mixed Reactions

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

Further, whatever the profile of its audience, public radio is available to almost 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, for example, speaks of programming for "all Americans." Numerous constituencies claim public broadcasting has a special responsibility to address their particular needs and interests. Congress, from time to time, has encouraged or required special attention to particular groups.

The Need for Targeting

Universal use of public radio is impossible in the American system of broadcasting. Such a goal may be appropriate for the declining number of countries in which public-sector broadcasting has a monopoly on the airwaves. It is completely unrealistic for a mixed system of public and commercial stations, especially when the commercial sector enjoys overwhelming superiority in spectrum space, number of stations, and financial resources.

Instead, public radio is but one choice among many in a competitive, highly segmented radio marketplace.

To serve a niche, or market segment, effectively, a station, and public radio generally, must make choices about whom to serve. For many, that will be a difficult challenge.

Most of these decisions must be made by individual stations. The decentralized American system of public radio places ownership and programming decisions in the hands of local licensees. The majority of funding is expected to come from the local level. Stations' public service responsibilities are defined by the FCC in terms of meeting local needs.

The targeting question is theoretically wide open for each station. As a practical matter, however, the issue of whom to serve is, for most stations, largely a matter of fine-tuning — history, local context, and the availability of national programming have already resolved many of the major choices.

Public radio stations are not empty vessels into which one might pour a wide selection of programming choices. Stations are established by their licensees with at least a broad sense of direction already in place. They are funded by their licensees and others on the basis of expectations about the service they will provide. Their programming options are circumscribed by services already offered effectively by other stations in the market.

Further, a station's appeal can be strongly shaped by the national programming it elects to carry. For most members of National Public Radio, NPR's information programming is the most important single

factor shaping the station's appeal. The appeal of available national programming, which an individual station can influence only to a very limited degree, strongly shapes a station's targeting options.

In this framework, station choices about niche and segment are often a matter of decisions at the margin. Even changes that generate heated debate within a public radio station — say, dropping a major classical music daypart in favor of more information programming — represent but small shifts of focus within the broader spectrum of the broadcast enterprise. This is not to minimize the difficulty of the choices stations continually face but only to clarify the range of the realistic options for most.

Some choices go well beyond the marginal, of course. A decision to drop all or most information programming would cause a radical shift in appeal for most public radio stations. A format change from classical music to jazz, or jazz to bluegrass, would have significant consequences for the station's target audience.

There are also critical choices of whom to serve that can be made at the national level, where the constraints and opportunities take on a different cast. Public radio's national entities — funders, program producers, program distributors, and service providers — implement audience-targeting decisions through indirect means. By selecting which stations and programming to fund, what kinds of programming to produce and distribute, and which stations will benefit from services, national organizations shape each station's operating environment and influence local targeting decisions.

Because national entities work with numerous stations, it is feasible (if not always practical) for them to embrace service to a number of distinct audience segments without compromising the integrity and consistency of an individual station's programming. The Corporation for Public Broadcasting, for example, currently supports stations that, compared to each other, present programming of diverse appeal. National Public Radio and American Public Radio both provide programming services for stations with different formats.

This flexibility at the national level is both an opportunity and a problem. It allows national or-

ganizations to respond to more diverse needs and interests than an individual station can contemplate. At the same time, it legitimizes diverse demands that can easily outstrip resources.

Looking ahead, 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, not with new decisions, but with taking responsibility for choices already made. The next step is deciding whether to affirm those choices or change them.

TARGETING STRATEGIES

There are many ways in which public radio can use AUDIENCE 88's findings to target programming and to improve its effectiveness in reaching listeners.

We see 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.

AUDIENCE 88 does not tell managers and programmers what programming approach to adopt; it does not prescribe action in pursuit of a given approach. Instead, AUDIENCE 88 *informs decision making by linking actions to outcomes*. If a station wants to take a specific action, AUDIENCE 88 suggests the most likely results to anticipate. Conversely, if decision-makers want to achieve a specific result, AUDIENCE 88 suggests the actions most likely to yield that outcome.

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 combination 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.

Many public radio stations will continue to rely upon a content-based approach centered on one or a few genres. A principal virtue of this strategy, in contrast to the appeal-based strategies discussed below, 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. A station's niche in its radio market is defined by appeal. Content decisions alone, by sidestepping the appeal issue, do not necessarily define such a niche. They can — especially if a station pursues a single area of content. But 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 the outcome of content-based strategies is 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.” A more sophisticated understanding of appeal can add subtleties

to this endeavor, such as working with the understanding that appeal does not necessarily change when a station switches genre and that it can change substantially between elements that superficially appear related.

As outlined in the AUDIENCE 88 *Advertising & Promotion* report, an appeal analysis of the schedule can inform on-air cross-promotion strategies, such as selecting combinations of programs to promote from and to that are closely matched in appeal. Similarly, knowledge of appeal can inform off-air advertising decisions, such as selecting “appeal matched” vehicles for advertising.

The *Membership* report demonstrates how awareness of appeal can translate to more effective membership drives, including the kinds of language that will be most convincing to the different kinds of listeners who are attracted to different kinds of programming.

In sum, even if appeal plays almost no role in deciding *what* a station programs, knowledge of appeal can play a major role in *how* that programming is implemented, and in how a station shapes the broad range of its supporting activities.

Appeal-Based Strategies

Appeal-based strategies for service shift the emphasis from *what* is being presented to *who* 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 different constituencies to which it hopes to appeal, perhaps through programming in a single content area, but more likely through several.

The broad concept of “specialized audience programming,” for example, is one approach to appeal-based targeting aimed at meeting the programming needs and interests of several groups.

Targeting Appeal

A station that elects to target its service based on appeal has, on a theoretical basis, a wide range of choices. The adoption of appeal-based programming does not dictate any particular segment or any particular content. It is, rather, a framework within which to make such decisions. Public radio programmers would have many options.

Given the diverse appeal of current programming on many public stations, one obvious choice would be to identify the audience segment for which the station currently generates its strongest appeal and then focus the station's overall effort toward that segment. Such segments could be defined demographically (education, age, income, race), psychographically (Inner-Directed, Outer-Directed), or by other means. Programming that does not appeal to the target segment would be curtailed or eliminated.

A station could also center its programming appeal on groups now largely outside the public radio audience, again using demographic, psychographic, and other segmentation analysis. The farther one seeks to move from the current appeal, however, the greater the program changes required to reach the target.

Such decisions would need to be guided, as now, by a clear sense of mission. The challenge would be to expand the mission from the familiar points of *what* a station should deliver and to embrace the sometimes more difficult issue of *who* it intends to serve.

Focusing Appeal

AUDIENCE 88's analysis suggests that public radio stations will maximize their audience service, in both the *number* of people listening and the *amount* of listening, by presenting a program schedule 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.

AUDIENCE 88 finds that the types of programming dominating public radio schedules do not share as

much affinity as people have assumed. On many public stations, appeal changes dramatically over the course of the day and week.

As a consequence, stations are not seen as reliable — that is, always listenable — by any single audience segment, and thereby perpetually underserve their potential audiences. AUDIENCE 88 identifies this as one of public radio's major programming problems — and opportunities.

An effort to focus appeal would represent a departure 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.

More with Less?

Strategies to focus programming's appeal present a superficial paradox: how can audience service be increased by consciously excluding many potential listeners? The answer, in simplest terms, is that that's how radio works.

Since no station can be all things to all people, each targets the appeal of its programming at a segment of the market. This creates a diversity of appeal across stations that offers listeners greater choice of programming and greater satisfaction with their programming of choice.

But while diversity of appeal *across* stations increases listener satisfaction, diversity of appeals *within* a radio station decreases listener satisfaction. When appeal is constant, listeners can tune in regularly and be consistently satisfied. When appeal changes, as it does on most public stations, regular tune-in is discouraged because listeners don't always get what appeals to them. Occasions, or tune-ins, are discouraged. Appeal seems truncate duration. Time spent listening, a direct function of occasions and duration, is thereby reduced and along with it average quarter-hour audience. Listeners are far less likely to consider the station important in their lives; they are even less likely to support it financially.

Real-Life Constraints

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.

The problem of explicit targeting can be substantially ameliorated when more than one public radio station serves a community. To restate the point, diversity of appeal across stations increases listener satisfaction. If two or more public stations, each with focused appeal, together serve a range of audience segments, the results are more likely to be acceptable.

SELECTING TARGETS

In seeking to reach particular audience targets — for public radio nationally, for an individual station, or for a particular program — 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 one’s strategy.

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 people listen to a particular station, or to particular programs, for a host of reasons, of which these characteristics are but part of the mix.

Some demographic factors that are useful in describing radio listeners contribute almost nothing

to an understanding of why those listeners listen. For example, a given percentage of a station’s audience may have a very low personal income. That may be helpful to know in evaluating prospects for listener support or underwriting. But knowing someone’s personal income does little to *explain* why these listeners are listening or to guide programming decisions that will reach them more effectively. Their personal income is most likely a reflection of other factors — perhaps age, race, education, or gender — that are more closely associated with their listening behavior.

AUDIENCE 88 data make it quite clear that the primary factor 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.

Education, age, and VALS type correlate highly with each other, and with a host of other factors. The discussion of the demographics of VALS types on the following two pages illustrates the ways in which these many variables cluster together.

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.

THE DEMOGRAPHICS OF VALS

One of AUDIENCE 88's main contributions to our understanding of the radio audience is the introduction of VALS analysis as a way of looking at listeners. Analysis of values and lifestyles is one of the most powerful tools for understanding the appeal of public radio and its various program elements.

The various VALS types, such as Societally Conscious, Achievers, and Belongers, are quite different from each other demographically. By examining the demographic composition of the VALS types for which public radio has its strongest appeal, we can gain a better understanding of why public radio listeners are overrepresented or underrepresented in various demographic categories. Equally important, this information can inform the feasibility of various strategies to improve service for different demographic groups.

VALS sets forth a conceptual framework describing people's values and lifestyles in a way that helps explain why they act as they do, both as consumers and as social beings. The word *values* is used in the broadest sense and indicates the combination of a person's attitudes, needs, aspirations, beliefs, priorities, and prejudices. The four major VALS categories are hierarchical, running from Survivors at the bottom to Outer-Directeds, Inner-Directeds, and Combined Outer- and Inner-Directeds (Integrateds) at the top. These VALS categories are divided into nine groups.

Societally Conscious

AUDIENCE 88 has documented the powerful appeal of public radio's formats to particular VALS types, the Inner-Directed, Societally Conscious, and, to a lesser degree, the Outer-Directed Achiever. Societally Conscious make up 42 percent of the total public radio audience. Achievers make up 26 percent of public radio's total audience. As we move

along the continuum toward more listening, stronger loyalty, and greater support of public radio, we find that the composition of the mixed-format type is even more heavily Societally Conscious.

AUDIENCE 88 has characterized Societally Conscious persons as having a profound sense of social responsibility, supporting such causes as environmentalism and consumerism; activists who are impassioned and knowledgeable about the world around them and perhaps attracted to simple living. They probably participate in the arts and attend cultural events. They may travel often, for business and pleasure, are likely to use credit cards, probably enjoy outdoor sports and activities, read a lot, watch little television and are concerned with energy conservation.

Let's take a closer look at this VALS type, which forms such a critically large component of public radio's audience and is so much a presence in public radio's core listenership. In 1978, it is estimated that the Societally Conscious population was at 6 percent of the total U.S. population. By 1980 this group had grown to 8 percent (from 9 million to 13 million), and estimates for 1990 place it at 11 percent of the population (20 million).

Societally Conscious are the best educated of the nine VALS groups. Sixty percent are at least college graduates and a striking thirty-nine percent have attended graduate school. The Societally Conscious are resistant to placing themselves in a neat political box, and although they tend to be on the liberal side, a significant minority, 28 percent, are more conservative than middle of the road. These people hold jobs that reflect their educational levels — 59 percent are in professional or technical positions. Their incomes are concentrated in a comfortable living range, with over half the group in the \$15,000 to \$40,000 range. While only 2 percent have incomes over \$75,000, only 7 percent have incomes under \$10,000.

Regionally, Societally Conscious people are over-represented in New England and the Pacific states. The ethnic pattern of the group is 87 percent white, 7 percent black, 1 percent Hispanic, and 5 percent other ethnic groups. This last percentage for “other” is large relative to the sample size as a whole and there are a high number of blacks compared to other Inner-Directed types.

Achievers

What of public radio’s second largest VALS group — Achievers? This group is characterized as affluent, driven, a group that has built our economic system and provides much of the leadership in business, the professions, and politics.

In absolute numbers, Achievers have remained a steady 35 million in the overall population, and estimates for 1990 are 36 million (20 percent of the population).

Achievers are the most conservative VALS group, with 58 percent calling themselves Republicans. Over two-thirds have gone beyond high school, 18 percent hold college degrees, and another 16 percent have attended graduate school. More than any other VALS type, Achievers hold managerial or administrative positions (17 percent), with 29 percent holding professional or technical positions. Achievers are the most affluent VALS group, with an average income of \$31,377. Only 9 percent have incomes under \$15,000 a year, and 10 percent have incomes of \$50,000 or more. Over half the Achievers have a household income of \$30,000 or more; this results in Achievers dominating the high income brackets.

Achievers, like the Societally Conscious, are most over-represented in New England and the Pacific states. The high proportion of Caucasians in the Achievers group is matched only by one other VALS

group. Ninety-five percent of the Achiever group is white, with under 2 percent black, a little over 1 percent Hispanic, and a little over 2 percent composed of all other ethnic groups.

Implications

How does this tie in with the appeal of public radio?

The people to whom public radio appeals most strongly have the income — and the sense of comfort within that income range — that allows them to give, and give generously, to public radio. These VALS groups are employed in decision-making positions throughout the business and service sectors, a good sign for public radio’s efforts to obtain increasing amounts of business support and other underwriting.

Societally Conscious, the group that responds most strongly to public radio, is the fastest growing population of any VALS group. Achievers, already a large segment of the population, are also increasing in absolute numbers although holding constant as a percentage of all Americans.

The demographic element of concern in this picture is the ethnic composition of these two VALS types. Blacks, Hispanics, and other ethnic groups are under-represented in both the Societally Conscious and Achiever groups with respect to their presence in the overall U.S. population. This compounds the skew which already exists for these groups with respect to educational levels.

With public radio’s current service so strongly keyed to these two VALS types, it will require special efforts to achieve “proportionate” service to Blacks, Hispanics, and other ethnic groups.

An excellent example of the way in which these points affect targeting strategies is the extent of public radio's service to black listeners. While 11 percent of Americans 18 years of age and older are black, six percent of the listeners in the AUDIENCE 88 sample are black. Blacks are about half as likely as whites to listen to public radio.

Is this because public radio is in some way appealing to whites while it is not appealing to blacks? AUDIENCE 88 suggests a different reason. As noted throughout this report, education is the strongest predictor of public radio use — the more education people have, the more likely they are to be public radio listeners. In this context, it is critical to understand the significant differences between blacks and whites with respect to educational attainment.

According to U.S. Census data, 19 percent of whites have attended at least four years of college, but only 9 percent of blacks have done so. Blacks are half as likely as whites to have completed four years of college. Education, not race, appears to account for most of the differences between black and white listeners in the public radio audience. Put another way, public radio is just about as likely to reach educated blacks as it is to reach educated whites.

Education does not account for all of the difference, of course. Even among educated listeners there are differences in taste and style. We noted, for example, that jazz has an especially strong appeal to black listeners.

But any effort to increase the percentage of blacks in the public radio audience that does not take account of current programming's strong appeal to educated listeners is unlikely to succeed. At the same time, any strategies to change the educational appeal of current programming to reach a higher percentage of blacks is likely to affect listening by many other groups as well.

It is important to emphasize that AUDIENCE 88 only documents the predictive power of education,

age, and VALS type with respect to public radio's *current* programming. The further one gets from such programming, the less one can rely on these factors. They may continue to be especially important; they may not. AUDIENCE 88 data simply do not address the question.

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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Membership

by David Giovannoni
(37 pages)

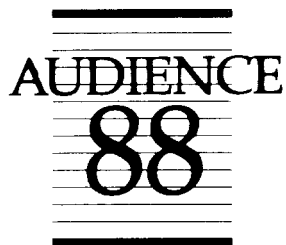
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A COMPREHENSIVE ANALYSIS
OF PUBLIC RADIO LISTENERS

Membership

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FOREWORD

Programming is the service listeners tune in to hear; it is the service that many pay to maintain. Since programming causes listeners, programming also causes membership. Membership activities provide the all-important rationale and means for listener support; but it's the *listener's relationship to programming* that is being sold.

For this reason effective membership decisions require a clear and accurate understanding of the relationships between programming and individuals. In 1986, the Corporation for Public Broadcasting funded a comprehensive study of these relationships. AUDIENCE 88 is the result.

Ric Grefé and Ted Coltman at CPB's Office of Policy Development & Planning realized AUDIENCE 88's potential from our initial discussions in 1986; their active support convinced the Corporation to invest in the project, and they have backed and guided it ever since. Doug Bennet and Joe Gwathmey at National Public Radio also saw the possibilities, and through the good offices of Effie Metropoulos contributed the Public Radio Audience Profile (PRAP) database, the giant upon whose shoulders AUDIENCE 88 stands.

AUDIENCE 88 adopts an interdisciplinary approach to audience research. Three of public broadcasting's foremost thinkers and leaders — Linda Liebold, Tom Thomas, and Terry Clifford — brought to the project a level of expertise gained through years of work in and dedication to public telecommunications. Each team member enthusiastically subjected their most fundamental assumptions to the purifying fires of new data. None of our assumptions remain unchanged — all have been destroyed, reshaped, or tempered as a result.

The AUDIENCE 88 team is grateful to all persons who have offered their suggestions and support. In particular, Nathan Shaw and Barry Forbes of the Development Exchange, and maverick membership expert Nel Jackson have greatly helped the presentation of this study.

David Giovannoni

Derwood, MD
December 1988

1.

WORKING SMARTER

One membership supports public radio's operation for every ten people who listen to public radio each week. While this ratio varies across stations, nationally the public radio system is supported by more than 1.1 million memberships out of a weekly cume audience of more than 11 million persons.

These numbers imply that one in ten public radio listeners is a paid up supporter. Interpreting the numbers in this way indicates that there is a lot of room for membership income to grow, since nine in ten listeners can still be turned into members.

Unfortunately, this is not the case. AUDIENCE 88's most conservative estimate is that one-fifth of public radio's weekly listeners live in households that currently support a public station. More important, between one- and two-thirds of all persons listening at any time are paid-up members.

Not only is there less room for membership growth than is widely assumed, but as a group the listeners who are not currently members are much less likely to become members than their paying counterparts. They depend far less on public radio and they consider it far less important in their lives — two very powerful indicators of membership.

Additional information sobers expectations even more: the size of public radio's membership is limited by the size of its audience. For many stations, as for public radio in general, there has been little if any significant audience growth during the last few years.

In short, the gold mine is smaller than we thought, all of the big easy veins have been mined, and we haven't acquired significantly more mining territory for several years. New members — already difficult to come by — will get even tougher to extract.

Membership professionals are acutely aware of these changes. Early warnings of harder times to come

have already begun to appear. Given the dynamics of membership just outlined, this problem is likely to become more widespread during the next few years.

Clearly, membership professionals will have to work even harder in the years immediately ahead. And, more important, they will have to work *smarter*.

Of course, membership professionals are constantly getting smarter as a result of much trial, error, and sharing of results. Ongoing experimentation and professional communication are always necessary to understanding how to work smarter.

So is new information. The goal of this AUDIENCE 88 report is to provide information about members and non-members that will help public broadcasters understand *why* some experiments are succeeding while others have failed. With this understanding they can devise new techniques and refine old ones in order to enhance the effectiveness of their endeavors.

The report begins with an examination of the traits that distinguish current members from non-members. It finds that people send money to a public radio station because they listen to the station's programming and consider it an important part of their lives. Although many consider the station an important community resource serving people other than themselves, this is not the reason they become members. They support because they themselves listen.

Programming, therefore, is the most powerful force determining listener support. The needs it serves, the niche it fills, and the type of people it attracts all add up to listener support or lack of it. In this way AUDIENCE 88 confirms the major findings of the *Cheap 90* study. ("*Cheap 90*" is the colloquial name of *Public Radio Listeners: Supporters and Non-Supporters*, published in 1985.) AUDIENCE 88 then picks up where the *Cheap 90* study ends.

THE AUDIENCE 88 DATABASE

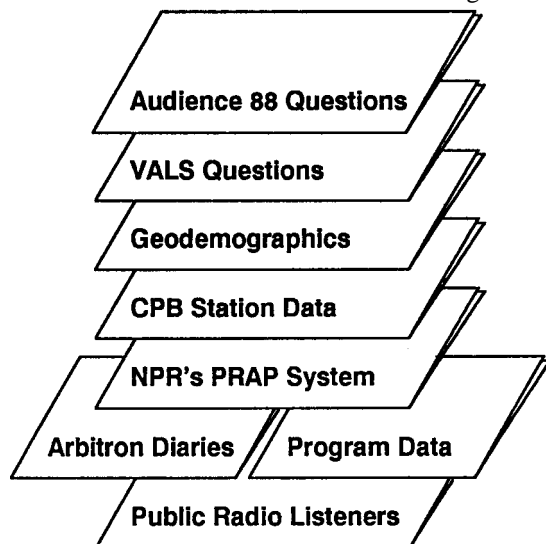
USING THE NUMBERS

Because AUDIENCE 88 is a national study, station personnel will want to use care in applying its results to their 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 the analysis, the AUDIENCE 88 team has scrutinized the data to ascertain whether a particular point applies to all programming or only to certain formats, to all stations or only to 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 almost 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 reach 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 households 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.

- AUDIENCE 88 examines membership by format, explaining why some formats have more members and others have fewer.
- AUDIENCE 88 defines the acquisition target as *listeners who are not members*. Its exploration of this target yields new information to help devise pitches that speak to the demographics, values, and lifestyles of potential new members.
- AUDIENCE 88 models the efficiencies with which off-air media and public radio's own air reach this target. It also ascertains the public radio programming most effective at reaching listening non-members.
- AUDIENCE 88 uses reach and frequency analysis to explore the effectiveness of an extended series of on-air pledge breaks. Even though the most intense pledge drive is not heard by one in three non-members, the two in three non-members who do hear pledge breaks hear them often enough to become supporters if they are so inclined.
- AUDIENCE 88 finds that traditional pledge drives are effective because they reach non-members with a sufficient frequency to be effective. However, they reach more members more frequently. Since members listen to more public radio than non-members do, one-third to two-thirds of the audience that hears any given pledge break is already a paid-up member.

TERMS TO KNOW

This report uses the basic terms defined below. For more specific information see the AUDIENCE 88 Terms & Concepts handbook and the AUDIENCE 88 Programming report.

Achievers: One of the Outer-Directed VALS types. Twenty-six percent of public radio listeners are Achievers. Competent, self-reliant, hard-working, and oriented to fame and success, Achievers are affluent people who strongly influence the economic system.

Average Audience: The number of persons listening to a radio station during a specified period of time. Also called average quarter-hour, or AQH, audience.

Acquisition Mail: Direct mail designed to generate new members.

Appeal: The link between programming, listeners, and listening. To “appeal” is to provide a program service that attracts certain segments of listeners more than others; as a noun, “appeal” is the often intangible attribute of programming that attracts these types of listeners.

Cheap 90: The colloquial title of *Public Radio Listeners: Supporters and Non-Supporters*, the author’s CPB-funded public radio membership study, published by the Development Exchange in 1985.

ClusterPlus: A geodemographic approach to segmentation developed by Donnelley Marketing Information Services, Stamford, CT. Classifies all U.S. neighborhoods into 47 neighborhood types according to their similarities among precise census measures.

Cold Mailing: An acquisition endeavor that uses direct mail to deliver membership pitches to people who have not demonstrated any interest in public radio.

Conversion Rate: The percentage of respondents to on-air prospecting activities who become supporters.

Different from the “contributing households as a percentage of listeners” definition usually applied.

Core Audience: The segment of a radio station’s weekly cume audience that listens to the station more than any other.

Cume Audience: The cumulative number of persons who listen to a radio station for a minimum of five minutes during a specified period of time, typically a week.

Current Member: A listener who lives in a household that has given money to a public radio station within the last 12 months.

Demographics: Measures of *who listeners are*; age, gender, education, occupation, income, and other personally descriptive measures.

Duration: The average length of time a person or group of persons stays tuned to a radio station once tuned in.

Frequency: The number of times persons who are reached by a message hear the message.

Fringe: The segment of a radio station’s weekly cume audience that listens more to some other station. The complement of core audience.

Geodemographics: Measures of *where listeners live*; their neighborhood type according to PRIZM or ClusterPlus definitions.

Inner-Directed: A VALS term describing people who conduct their lives in accord with inner values (the needs and desires private to the individual) rather than in accord with the values of others.

Lapsed Member: A listener who lives in a household that gave money to a public radio station more than 12 months ago. AUDIENCE 88 limits its examination of lapsed members to those who are still listeners.

Loyalty: The percentage of a person's or group of persons' total radio listening given to public radio.

Member: See current member.

Never Member: A listener who lives in a household that has never given money to the public radio station to which he or she now listens.

New Member Rate: The number of non-members who become first-time supporters, expressed as a percentage of a station's weekly cume audience.

Non-Member: A listener who is not a current member; could be either a lapsed or never member.

Non-Supporter: Same as non-member.

Occasions: The number of times a person or group of persons tunes in a radio station during the course of a week.

Outer-Directed: A VALS term describing people who conduct their lives in response to external signals. Activities and attitudes of Outer-Directed individuals are guided by what others will think.

Pitch: A message delivered to a listener that is intended to elicit a specific behavior. The message may go so far as to ask a listener to pledge or send money, or it may simply stimulate him or her to call the station for some reason.

PRIZM: A geodemographic approach to segmentation invented by Claritas, Washington, DC. Classifies all U.S. neighborhoods into 40 types according to their similarities among precise census measures.

Prospect: A listening non-member; a person in the target audience of likely new members.

Psychographics: Measures of *what listeners think*, such as interests, opinions, values, attitudes, beliefs, and personality traits. Based on psychological, as distinguished from demographic, dimensions.

Reach: The percentage of persons in an audience segment who hear a message.

Renewal Rate: The percentage of a station's current members who become members again upon the expiration of their membership.

Response Rate: The number of non-members who respond to on-air prospecting, expressed as a percentage of a station's weekly cume audience.

Sale: Convincing a prospect to become a member.

Societally Conscious: The Inner-Directed VALS type most associated with public radio. Forty-two percent of public radio listeners are Societally Conscious. They have a profound sense of societal responsibility. Their concerns extend beyond themselves to society as a whole.

Supporter: See current member.

Time Spent Listening (TSL): The amount of time a person or group of persons listens to a radio station during the course of a week. The product of occasions and duration.

Utiligraphics: Measures of *how listeners listen* to public radio and to radio in general.

Values and Lifestyles (VALS): An approach developed by Stanford Research Institute, Menlo Park, CA. Segments persons into nine distinct types reflecting basic attitudes and beliefs.

Warm Mailing: An acquisition endeavor that uses direct mail to deliver membership pitches to people who are known to be listening non-members.

Years Spent Listening (YSL): The number of years a person or group of persons has been listening to a radio station.

RECONCILING THE DIFFERENCES

According to CPB's Office of Policy Development and Planning, public radio was supported by over 1.1 million memberships — about 10 percent of the national weekly cume audience for the system of CPB-qualified stations — at the time the AUDIENCE 88 survey was administered. Yet AUDIENCE 88 finds that 34 percent of its respondents claim to have financially supported their public radio station within the last twelve months.

This 24-point discrepancy forces us to take a closer look at these two different methods of reporting current membership levels. Closer examination confirms that AUDIENCE 88's findings are solid.

The “memberships divided by cume” method assumes only one membership per listener. Consider the case where a family of two public radio listeners supports its station with a single membership. Each person is counted into the cume, but public radio's membership tracking sees only one membership.

The average size of a public radio-listening household is about two and one-half persons 12 years or older (from *The NPR Audience*). If two of them listen for every membership, then 20 percent of public radio's weekly cume are members.

That leaves a 14 point discrepancy between the 20 percent figure and AUDIENCE 88's 34 percent. This discrepancy narrows when several aspects of AUDIENCE 88's method are taken into account.

Almost 2,400 people in AUDIENCE 88's beginning sample of 6,315 listeners did not answer the membership question; they either failed to return their survey or returned it with the membership question unanswered. If these listeners were similar to respondents, 34 percent would be members. But analysis (not presented here) shows that they are lighter listeners with lower loyalty. Since membership is highly associated with public radio use, non-respondents are much less likely than respondents to be members.

If we assume that 10 percent of AUDIENCE 88's non-respondents are in fact current members, then we find that about 25 percent of the people in the beginning sample claim to be current members:

1,345	respondents claim to be current members;
	of the
2,387	non-respondents,
<u>x .10</u>	(10%) are assumed to be members, yielding
239	members assumed excluded from the analysis;
	respondent members
1,345	excluded members, adds up to
<u>+239</u>	persons counted as members;
1,584	
	members out of
<u>1,584</u>	persons in the beginning sample yields
6,315	
	25% of the weekly cume living in households cur-
	rently supporting at least one public station.

This 25 percent estimate is more realistic; yet if the two-listener-per-membership 20 percent figure is correct, there are still some respondents (as many as one in five) claiming to be members who in fact are not members at all.

AUDIENCE 88 takes extensive precautions to ensure that this reporting inaccuracy does not compromise the validity of its findings. Its survey design minimizes the magnitude of this problem, and its analyses minimize its effect. In most of its analyses, AUDIENCE 88 focuses not on the relative sizes of the member and non-member segments but on their *behavioral differences*; every finding is tested for its statistical and practical significance.

When the numbers of member and non-member listeners are important, AUDIENCE 88 adjusts reported membership by a factor of 20/34. In other words, the percent of the audience claiming to be members is scaled back to 20 percent — the assumed correct percentage of the weekly cume who are members.

2.

UNDERSTANDING MEMBERS

While listening to public radio precedes supporting public radio, not all listeners are supporters. This section explores the characteristics of current supporters and discovers differences between supporters and non-supporters that public broadcasters can use to craft more effective membership messages.

Programming causes audience; it's what makes a person a listener. But a listener's decision to support public radio is based on a highly inter-related set of considerations. AUDIENCE 88 finds that:

- listeners who use public radio's programming regularly and often 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 much more likely than others to be members;
- 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.

All of this is at work *before* opening the mike or signing a letter asking for support. But support comes only after the mike is opened or after the letter is read. Understanding these findings enables membership professionals to craft more effective pitches — both on and off the air.

Personal or Altruistic Importance?

Two complementary theories attempt to explain why people support public radio. 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 a person uses a station, the more entwined it becomes into his or her daily routine; the more a station is entwined into a daily routine, the more a person considers it personally important.

Listeners for whom public radio is personally important are twice as likely as others to be current members. They pay for it 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 it is a “public good.” Perhaps they consider it to be a community resource, something important to other people. For these persons public radio is a cause — a concept they endorse, not necessarily a service they use themselves. They support it on altruistic grounds just as they support a political party, an environmental group, or an arts patronage society.

UTILIGRAPHICS AND MEMBERSHIP

Regular use of a radio station indicates that its programming is meeting a listener's needs. For this reason the *frequency* with which a person uses public radio and the *amount of time* he or she spends with it are strongly associated with membership.

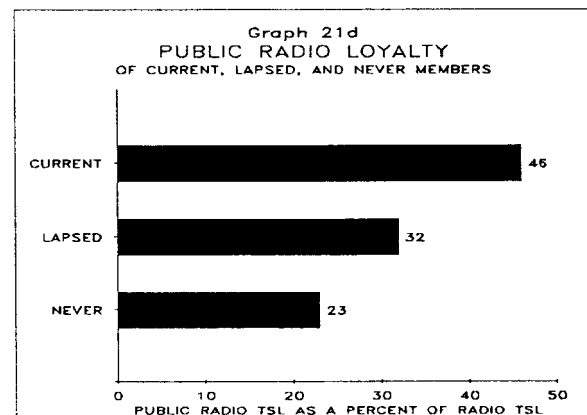
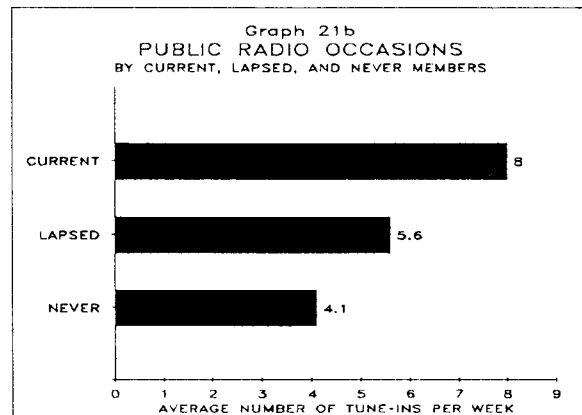
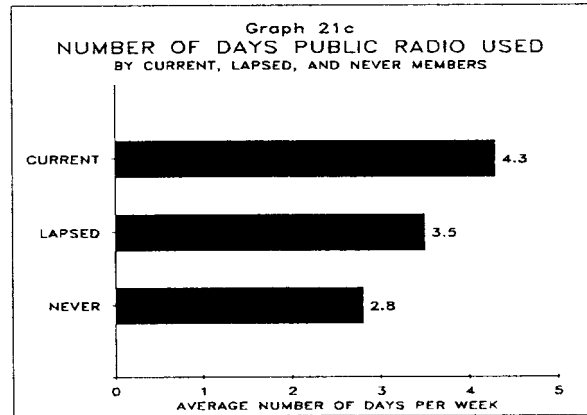
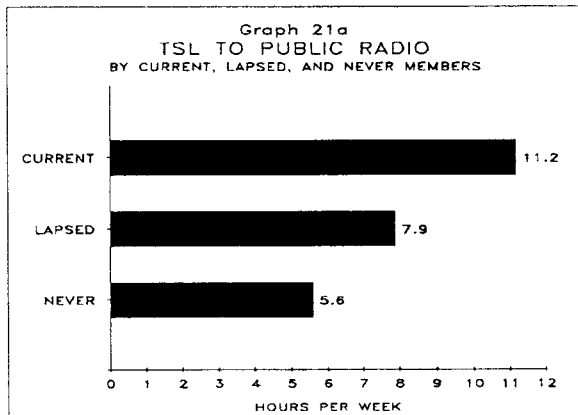
Current members spend twice as much time with public radio each week than never members — persons who have never been members (Graph 21a). *Members listen longer because they tune in more often* — an average of 8 times (occasions) each week compared with never members' 4 (Graph 21b).

However, *members do not listen significantly longer once they are tuned in*. They average 85 minutes of listening per occasion, compared to never members' 81 minutes (not shown).

Members tune in more regularly — 4.3 days per week on an average; never members use their public stations only 2.8 days each week (Graph 21c). More than half (54%) of all members listen five or more days per week; fewer than one-quarter (23%) of never members use their station this often (not shown).

Current members are more loyal to public radio than are listeners who have never been members (Graph 21d). As a group, almost one-half (46%) of the total radio use of members is spent with their public radio station. Compare this with the 23 percent loyalty of never members.

Clearly, members rely more heavily on their public radio stations than do non-members.



Certainly listeners can support a public radio station for both altruistic and personal reasons. Yet if one reason is consistently more important than the other in motivating support, public broadcasters could play on the appropriate theme to encourage more listeners to become members.

The Roots of Altruistic Importance

The *Cheap 90* study showed personal importance to be strongly correlated with membership. AUDIENCE 88 goes one step further and tests whether altruistic importance also leads to listener support.

AUDIENCE 88 finds no direct link between altruistic importance and membership. While most listeners strongly agree that their public station is an asset to the community, this belief is not what leads them to support public radio. In fact, AUDIENCE 88 finds that an altruistic attitude toward public radio is linked strongly to formal education and, interestingly enough, to the use of public radio.

Formal education is linked to altruism because social altruism is in great part a learned virtue. In the same way that the best-educated people tend to be those most likely to support museums, art galleries, symphonies, and other cultural resources in the community, they are the most likely to consider public radio a community resource.

Altruism's link with use is just as direct. Listeners think a station is important to others when it is important to them; if it is not important to them, they are unlikely to think it important to others. They assume that programs important to them, programs that they use, are also important to the community in general. They do *not* feel that programs they do *not* listen to make the station more of an asset to the community.

Therefore, an altruistic attitude toward public radio can be explained by the *use* of its services by *well-educated* persons. Because education is the single most distinguishing characteristic between public radio listeners and non-listeners, it comes as no surprise that most of the audience attribute altruistic importance to its public radio station. (AUDIENCE 88's *Programming* report examines these relationships in much greater detail.)

To summarize, *while most listeners perceive their public radio station as a public good, it is their use of the station that drives both their perception of its importance and their support.* While the perception of altruistic importance may be a key argument for underwriters, it is not the reason listeners support public radio. People give to public radio because they listen to public radio.

The Roots of Public Radio Support

This discovery has important ramifications for how and why programming may be done at stations (as AUDIENCE 88's *Programming* report discusses in detail). *Programming tactics that maximize listener satisfaction and encourage use of the station are the most critical controllable factors turning listeners into supporters.* (This standard applies to on-air fund drives as well as all other programming).

Another important ramification is that listeners pay for the use — not the availability — of programming. Some stations air highly targeted programming that doesn't get much listening or pledging; yet many believe that this programming causes people to give because it appears to be some sort of public service. Under careful scrutiny, AUDIENCE 88's data refute this assumption.

This knowledge helps membership professionals better shape and target their pitches for support. *The message must be to pay for services rendered, not to subsidize a public good.* The message can be honed to match the characteristics of the listening non-member audience; when delivered on-air, it can be placed for maximum impact (see Section 3).

Ability to Support

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

In other words, the ability to support becomes a factor only after the desire to support is apparent. Some listeners may be more willing but less able, others more able and less willing.

WHAT MAKES A MEMBER

AUDIENCE 88 supports previous studies in its quest to distinguish the most discerning characteristics of current, lapsed, and never members. It confirms that regular and extended use of a public station is the most powerful predictor of membership.

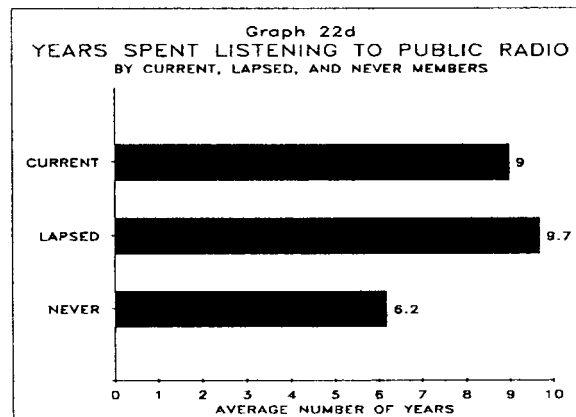
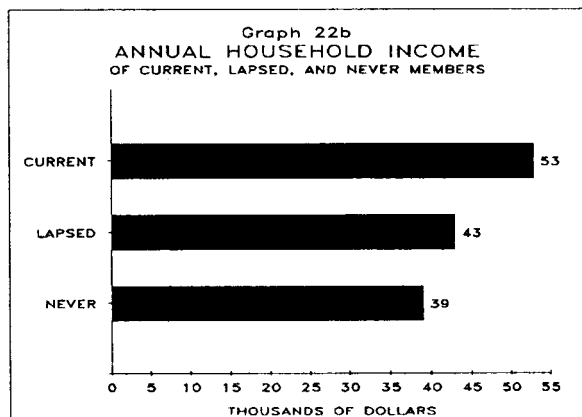
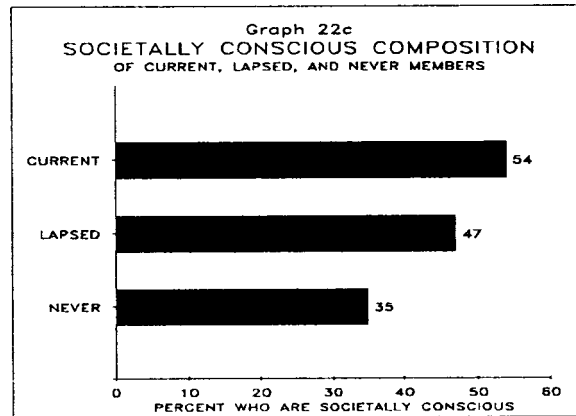
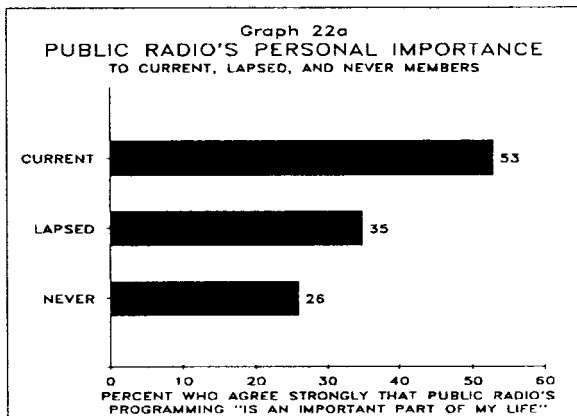
A person's use of a station often leads to his or her perception of its personal importance. But personal importance is consequential in its own right; even after use is taken into account, a listener's perception that the public station is important in his or her life remains a very powerful predictor of current membership (Graph 22a).

After use and personal importance are considered, income becomes a distinguishing characteristic of membership. Of the people who use public radio regularly, and who subsequently think it important

in their lives, those who are most able to afford it are the most likely to support it (Graph 22b).

The VALS segmentation scheme is highly correlated with use, personal importance, and income. Over half (54%) of public radio's current members are Societally Conscious, compared to only one-third (35%) of all listeners who have never been members. Yet while highly correlated, the combination of use, personal importance, and income better predicts membership than does VALS (Graph 22c).

Current and lapsed members have been listening to their public station an average of three to four years longer than other listeners. Lapsed members have been listening longest of all — an average of nearly ten years (Graph 22d).



Appeal

Every minute of radio programming, whether on a commercial or public station, holds a certain type of attraction for a certain type of person. This attraction — the force bringing listeners to it — is called *appeal*. People listen to programming on a radio station because it *appeals* to them.

Programming and listening are linked by the concept of appeal. To “appeal” means to provide a program service that attracts certain segments of listeners more than others; as a noun, “appeal” is the often intangible attribute of the programming that attracts these types of listeners.

Appeal describes why some people listen and why others do not; it also describes who those people are. “*Appeal*” is not synonymous with “popularity.” Instead, it describes the attraction of a program or program service for a particular audience segment.

In this way appeal is like a magnet. It attracts certain types of people while leaving others unmoved. It even repulses some. That’s the nature of all radio formats — public radio’s included.

Appeal is like magnetism in another way. We can see only its effects; we cannot see it. In the same way that iron filings line up along magnetic lines of force, public radio’s appeal can be seen in the lining up of its listeners along highly visible demographic and psychographic lines.

Appeal is the foundation of AUDIENCE 88’s *Issues & Implications* and *Programming* reports, which can be consulted for further detail. For this discussion, the most important points are simply that programming causes audience, and that different types of programming cause different types of audiences.

Public Radio’s General Appeal

Public radio’s audience is better educated than the population as a whole. Perhaps the attribute of its programming that appeals to these listeners might be loosely defined as “intelligence” or “quality.” Or perhaps the appeal is the social responsibility and concern felt by the Societally Conscious individual; or some aspect of competence, self-reliance, and efficiency valued by the Achiever.

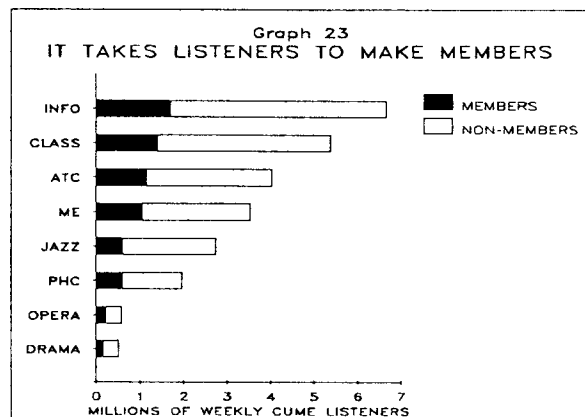
This should come as no surprise. Public radio professionals themselves are very well educated. Their programming reflects their own ideas, ideals, attitudes, and assumptions. Public radio’s listeners are drawn to it because they share the same ideas and assumptions, the same intellectual curiosity about society, culture, and events.

Formats and Membership

Since appeal indicates why people are listening, it suggests the types of pitches to which listeners are most likely to respond; since different programs and formats vary in their appeals, *membership efforts can be fine-tuned by format*.

The different types of listeners served by public radio’s different types of programming become members for somewhat different reasons. Their use of public radio, their perceptions of personal importance, and their ability to afford a membership are all present — but in subtly different proportions.

The sidebar on the following two pages shows how the different appeals of public radio’s major program services directly affect the number of listeners who are members, and the reasons why. It is vital to keep in mind that this is an examination of *qualitative* differences; *the programming with the highest proportion of members is not necessarily the programming with the highest number of members*, as Graph 23 illustrates.



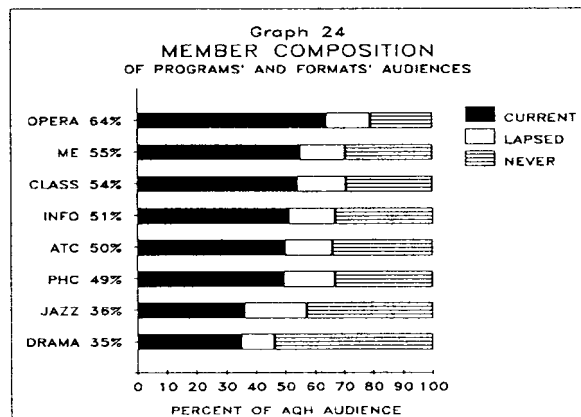
For information, classical music, All Things Considered, Morning Edition, jazz, A Prairie Home Companion, opera, and drama, the number of cume listeners who are members.

HOW AND WHY MEMBERSHIP VARIES WITH FORMAT

Public radio's major formats appeal to different types of people. Some use public radio more than others; some earn more money and can better afford a financial gift; and some consider public radio to be more personally important than others. These characteristics work together to affect membership among people attracted to various programming.

Graph 24 shows the membership status of the listeners to public radio's major formats. Opera has the highest concentration of current members while drama and jazz have the lowest concentrations.

It is important to note that high or low *concentrations* of members do not necessarily mean large or small *numbers* of members. (See Graph 23 for numbers in cume terms.) Also, this graph should not be interpreted to show what services cause listeners to become members.



While it is uncorrected for over-reporting, Graph 24 can still provide a comparative estimate of the number of members listening to these services on your station. Multiply your station's AQH audience for the service by AUDIENCE 88's estimate of the percent of the audience who are members — the number next to each program and format name.

Why Is Opera on the Top? Opera has the highest concentration of members because of the type of people who listen — and don't listen — to it. A subset of classical music, opera does not serve most classical listeners; it repels many more than it attracts. The small group who remains uses public radio a great deal and considers it very important.

Over half of all opera listeners feel that public radio is an important part of their lives because they rely on public radio heavily for other programming as well. Virtually no opera listeners tune in just for opera; two in three are in public radio's core; opera listeners' loyalty is the highest of all major formats'.

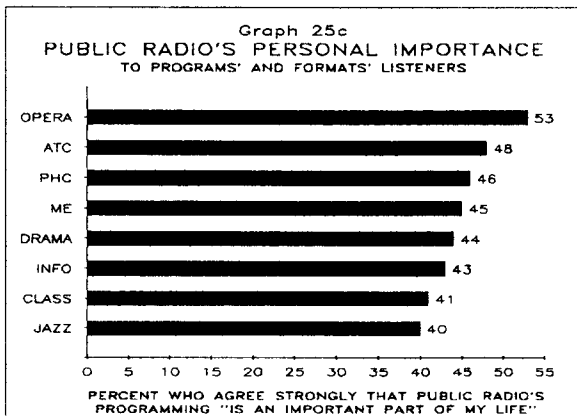
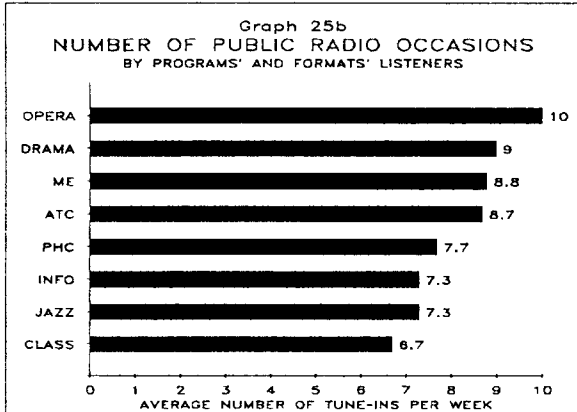
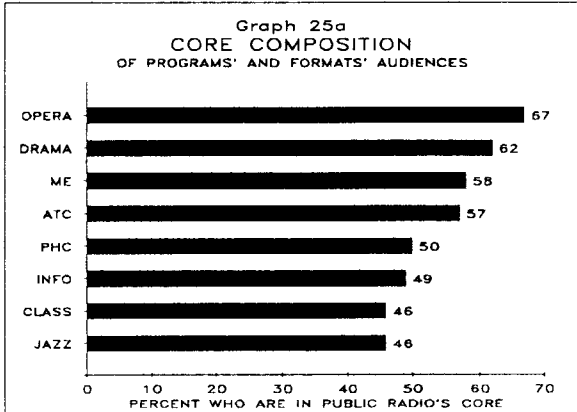
Therefore, opera has the greatest concentration of members because its listeners use a lot of public radio and consider it — in its entirety — very important in their lives.

Why Are Jazz and Drama on the Bottom? Jazz and drama have the lowest concentrations of members for distinctly different reasons.

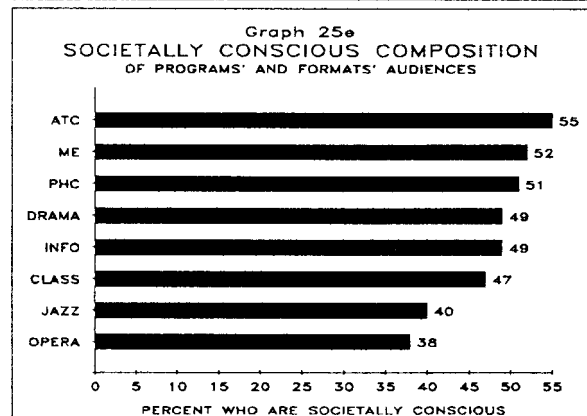
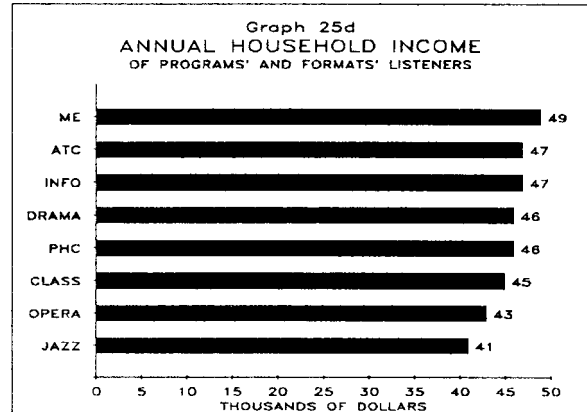
The jazz audience has the lowest annual household income of any major public radio format, making its listeners the least capable of affording membership. Jazz listeners do not rely heavily on public radio; this contributes to their relatively low opinion of public radio's personal importance.

Drama listeners are like jazz listeners when it comes to their low assessment of public radio's personal importance. Although they are heavier users of public radio, they listen to even more commercial radio. More than half of the 33 hours they spend listening to radio each week are spent with commercial stations.

For these reasons, jazz and drama have the lowest concentration of members.



These graphs expose the underpinnings of listener support by format. Core composition and occasions reflect the extent to which each format's audience uses public radio. While highly correlated, personal importance goes beyond use to indicate willingness to support. Only after willingness is taken into account does the ability to support (as reflected by household income) come into play. The Societally Conscious personality weighs in as a composite of these characteristics — not a predictor of support in its own right. All estimates are based on AQH.



Summary

Public radio's programming is the product that listeners pay to maintain. AUDIENCE 88 establishes links between listeners, listening, programming, and membership, and identifies several variables that explain why certain types of programming yield more members than others. It finds that:

- People are most likely to use public radio, to subsequently consider it an important part of their lives, and ultimately to support it with a pledge, when its programming resonates with their own attitudes, assumptions, values, and lifestyles. This resonance of appeal is also a powerful pitching theme.
- Although most listeners think public radio provides an important service to others in the community, they support it because they themselves use and value its programming. Therefore, personal importance is a more powerful pitching theme than altruistic importance.
- Listeners' ability to support public radio becomes a factor only after their use and its appeal are taken into account.
- The different concentrations of members in each program's or format's audience is accounted for by each service's relative appeal to various types of listeners.

CONFIRMING THE "CHEAP-90"

AUDIENCE 88 stands on the shoulders of a study well-known by public radio's membership professionals. Funded by the Corporation for Public Broadcasting and published by the Development Exchange in 1985, the *Cheap 90* is recognized as a landmark study into the differences between members and listening non-members — the "cheap 90 percent" of the audience.

Significant similarities and differences between the two studies are worth noting.

- Both AUDIENCE 88 and the *Cheap 90* are based on reinterviews of Arbitron diary keepers who recorded listening to public stations.
- Each study is a cross-sectional "snapshot" of the audience — not a longitudinal investigation that follows changes over time.
- AUDIENCE 88 reinterviewed more than twice as many listeners as the *Cheap 90*, making its findings twice as reliable and allowing twice the precision and detail in its explorations.
- AUDIENCE 88 goes beyond "personal importance" and tests the "altruistic importance" theory of support.
- AUDIENCE 88 expands into the geodemographics and lifestyles of the audiences. While some stations have examined their listeners and members in these terms, AUDIENCE 88 provides the first major national examination of PRIZM, ClusterPlus, and, most importantly, VALS.

AUDIENCE 88 learned from the *Cheap 90*, and these lessons account for the major differences between the two studies.

AUDIENCE 88 confirms and strengthens the *Cheap 90*'s most important conclusions. By measuring many of the same things three years apart, the two studies demonstrate more stability than change among public radio's listeners, the reasons they listen, and the reasons they give. The basic truths don't change quickly if at all.

3.

REACHING NON-MEMBERS

Only public radio listeners become public radio supporters. Therefore, acquiring new members requires reaching listeners who are not already members. This section demonstrates how to compare the efficiencies with which on-air endeavors and cold direct mail reach this target of listening non-members. It ascertains when non-members are listening to various programming on public radio, and it describes them in demographic, psychographic, and utiligraphic terms. This information can be put to work to reach and pitch to prospective members more effectively.

When seeking new members, public broadcasters can pigeonhole all persons into one of three types. The first group is composed of people who do not listen to public radio; they have no reason to support it. There may be exceptions, but talking to them will result in virtually no new members.

The second group is composed of people who are already members. These are listeners for whom public radio is important enough to support with a membership. When seeking new members, there is no need to talk to persons in this group.

The remaining group — people who listen to public radio but who are not members — is the prime target for membership acquisition activities. These are the people most likely to become new members.

This section explores various media through which listening non-members might be reached. It also provides information about this target audience that can help public broadcasters devise more powerful pitches that motivate listeners in desired ways.

Cold Off-Air Media

Acquiring new members requires reaching a target audience of *non-members who are also listeners*. Since this target is defined by its use of public radio, and since public radio is a communications medium, no other medium can be as efficient as public radio itself for reaching this audience. Why, then, should public broadcasters consider using any other medium?

One reason is that some public stations have had moderate success with acquiring members off-air. They find that a printed, personalized, and sometimes in-person request can reach a listener who did not hear or respond to the most recent on-air pledge drive.

Getting membership pitches to people who have not demonstrated any interest in public radio is called “cold” off-air acquisition. Although we can target people who are more likely than others to respond, the acquisition message seems to come from nowhere. “Warm” off-air acquisition pitches membership to persons who we know are listening non-members.

Because it requires buying or bartering for another medium, cold off-air acquisition carries with it some sort of price tag. Getting the most out of this investment requires the purchase of highly targeted media that efficiently reach listening non-members. Direct mail is considered by experts to be one of the most targetable media.

But because of the cost, mailing lists must be chosen with care. AUDIENCE 88 informs this decision by identifying the *geodemographic* segments that most efficiently reach listening non-members.

Geodemographics characterize people’s lifestyles based on where they live. This approach assumes that people move to neighborhoods where other people share similar cultural backgrounds, perspectives, and circumstances. The neighborhoods, in turn, reinforce similar attitudes and behaviors.

AUDIENCE 88's *Underwriting* report shows that people in certain geodemographic clusters are more likely than others to listen to public radio. Here AUDIENCE 88 goes one step further to assess which clusters best reach *listening non-members*.

Table 31 shows ClusterPlus and PRIZM segments that might be purchased. (For a description of these geodemographic segmentation schemes, refer to AUDIENCE 88's *Terms & Concepts* handbook.) The highest percentage of listening non-members is found in PRIZM's Suburban 1 (S1) cluster; 11.6% of its inhabitants are in public radio's weekly come but are not current members. This cluster is the most *efficient* for acquiring new members.

Suppose you bought a mailing list for S1 households in your broadcast area, to which you sent a letter asking for support. For every 1,000 direct mail pieces sent, 843 will go to non-listeners and 41 will go to current members; only 116 will reach the target of listening non-members.

Cold direct mail is considered a resounding success if it generates a 2 to 3 percent response rate. Even assuming that 9 percent of the listening non-members respond by sending your station a check, this mailing would yield about 10 new members for every 1,000 mail pieces sent — an overall response rate of 1 percent. This rate is in line with the acquisition mailings done by public stations to date.

Assessing the Payoff

Approaching this from a return on investment viewpoint, what level of support is needed from these 10 new members for this off-air endeavor to break even? Assuming that the acquisition mail pieces cost 40 cents each, or \$400 per 1,000 (a conservative estimate, given purchase of the names, printing, postage, staff time, and other production costs), your station must average a \$40 return from each of the 10 new members just to break even.

However, \$30 is a more realistic first-year membership level, so the station realizes a \$300 return for each \$400 invested. Of course, membership is not a one-time proposition. If one year later 6 of these new members renew at an increased rate of \$35, another \$210 comes back to the station. At this point, the \$400 investment has been recouped, and the station is ahead \$110 (minus the cost of renewal). Any renewals or increased levels of support in subsequent years will be "profit."

Some public broadcasters believe that cold off-air acquisition efforts reap other rewards. For instance, some consider direct mail to be a form of advertising that puts a message about public radio into non-listeners' hands. While this may be true, \$100 per 1,000 (the first year net cost) is a very high price to pay by advertising standards.

Table 31. The PRIZM and ClusterPlus Segments That Reach the Most Listening Non-Members.

Acquisition mail's target is listeners who are not current members. Acquisition mail is wasted when delivered to current members and non-listeners.

Shown here are the percentages of persons in each geodemographic segment who are in the target and the two waste groups. The segments are ranked by their efficiency in hitting the target. (Member estimates are corrected for over-response.)

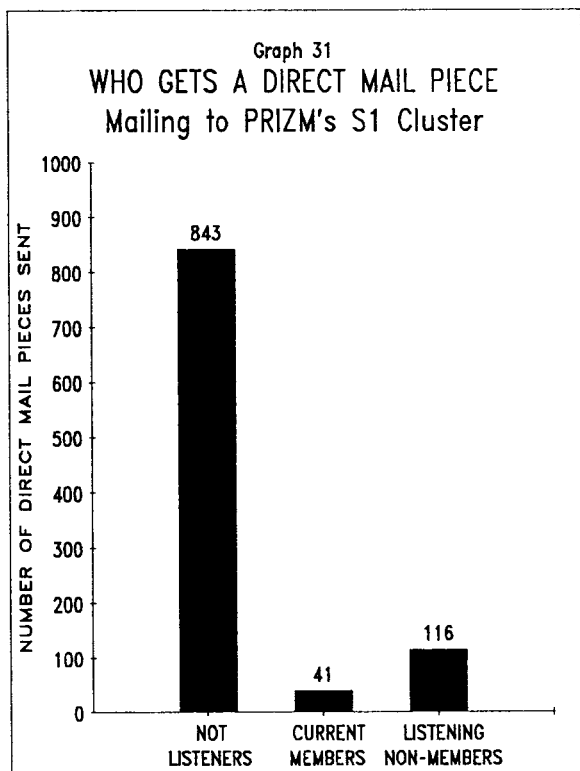
PRIZM's Suburban 1 cluster is the most efficient. For every 1,000 pieces of mail sent into the cluster, 116 (11.6%) will hit listening non-members.

	Target	Current Members	Non-Listeners
PRIZM			
Suburban 1	11.6	4.1	84.3
Suburban 2	9.2	2.8	88.0
Urban 1	7.8	1.9	90.3
Urban 2	7.0	1.3	91.7
Suburban 4	6.0	1.5	92.5
Suburban 3	4.8	1.0	94.2
Towns 1	4.1	1.2	94.7
Rural 1	2.8	.5	96.7
Towns 2	2.6	.5	96.9
Urban 3	2.4	.4	97.2
Towns 3	1.7	.4	97.9
Rural 2	.5	.1	99.4
ClusterPlus			
Group 2	11.2	3.3	85.5
Group 1	9.2	2.9	87.9
Group 6	6.7	1.5	91.8
Group 9	6.7	1.5	91.8
Group 5	4.8	1.3	93.9
Group 3	3.8	.8	95.4
Group 4	3.6	.8	95.6
Group 8	1.9	.3	97.8
Group 7	1.4	.2	98.4
Group 10	.6	.1	99.3
Total U.S. Population	4.5	1.1	94.4

This example is a best case scenario when geodemographics are used alone. By carefully selecting other characteristics, membership professionals may be able to generate lists that perform better than the scenario presented here. For instance, since educational attainment is the characteristic that best separates public radio listeners from non-listeners, alumni lists may prove to be somewhat more effective than geodemographics alone.

One inescapable fact remains, however. Cold mailings and all other cold off-air activities require the purchase of a communications medium; even when traded or bartered this demands a cost that access to public radio's own air does not. In addition, no off-air communications medium reaches the prime target of listening non-members more efficiently than public radio's own air. Therefore, *relatively high cost and high inefficiency are characteristics of cold off-air membership acquisition activities.*

Assessing whether or not to make the investment requires weighing its cost against its benefits. As outlined here, you must know your target, evaluate how well each medium would reach your target, and weigh the cost of each against its expected payoff.



On-Air Activities

After completing their own analyses, many professionals will decide that direct mail and other off-air media are too expensive, too risky, or too extended in their payback period to warrant investment as a means of generating membership. For them, public radio's own air is clearly the medium of choice.

Recall the three pigeonholes into which all people can be placed: listening non-members (the target), listening members, and non-listeners. Public radio is the only medium that does not reach people who are not listeners — the largest source of waste for any other medium. For this reason, *public radio's own air is by far the most efficient medium for reaching the target of listening non-members.* And because it does not need to be "purchased," the return on investment ratio — the expected payoff — is very high.

A station's own air offers one other advantage: *absolute and total control.* Public broadcasters can control what is said, how it is said, and when it is said; they can deliver the message in the context of the service they are attempting to sell to listeners.

Like any other communications medium, public radio can be used strategically to take advantage of its inherent strengths. AUDIENCE 88 finds that *certain programming types are better at reaching non-members than others.* In other words, pitching will reach the target more effectively with some formats and programs than with others.

AUDIENCE 88 identifies the *characteristics of the non-member audience for major program types* — information that is very useful in understanding who listening non-members are and in designing pitches that motivate them in desired ways.

When To Use Your Air

Each public radio format or program appeals to a specific type of listeners. The amount of public radio these listeners use, the personal importance they attach to it, and their ability to afford membership all figure into their propensity to support public radio, as explored in Section 2. But on-air

WHEN TO REACH NON-MEMBERS

Your on-air efforts are most efficient when reaching the greatest number of non-members. By combining your station's Arbitron estimates with findings from AUDIENCE 88, you can estimate how many non-members your pitches will reach during specific times of the day.

This simple technique requires (1) understanding the difference between cume and AQH audiences, (2) identifying the relative compositions of audience during various types of programming, and (3) applying these composition estimates to your own station's AQH estimates.

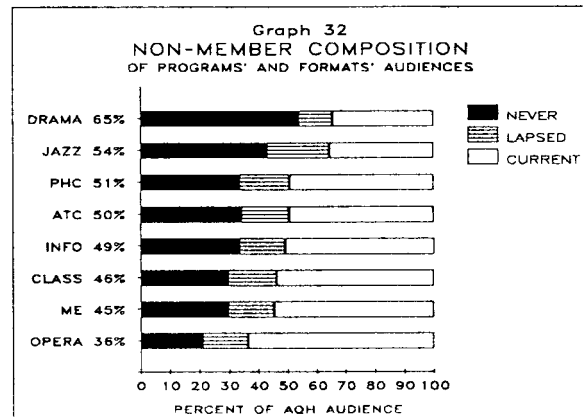
Use AQH, Not Cume. Public broadcasters often measure membership and non-membership in relation to their weekly cume. Non-members account for 75 to 80 percent of a typical station's weekly audience when counted this way.

But the application at hand requires knowing the number of non-members listening *at a given time*. What percent of the audience hearing a pitch are not members? This is a job for AQH.

Non-members use public radio much less often than members do, and so they are less likely to be in the AQH audience than their cume would suggest. AUDIENCE 88 estimates that only half of public radio's AQH audience is composed of non-members. Even accounting for over-reporting, *fewer than two in three AQH listeners are non-members*. In other words, *for every member who hears an on-air pitch, only two non-members hear the pitch*.

Consider the Programming. The ratio of two non-members to one member is an average across all types of programming. AUDIENCE 88 finds that certain program types are more likely than others to attract and serve people who are not yet members. Therefore, you must consider the type of programming on the air at the time of the pitch.

Graph 32 shows the membership composition of the audiences for various types of public radio programming. Although the graph is unadjusted for over-reporting, it does indicate programming which is most heavily laden with non-members.



The graph indicates the *proportion* of non-members reached. Pitching during drama and jazz programming will be heard by proportionately more non-members than members.

Figure It Out. To estimate the actual *number* of non-members listening to your own station's programming, multiply the AQH audience listening to your station at a given time by the percentage of the audience that are non-members for that program or format. These numbers are shown on the graph. This process yields an estimate of the number of non-members who will hear your pitch.

For instance, assume your station serves 3,000 AQH listeners during *Morning Edition* and 1,000 listeners during evening jazz. A pitch during *Morning Edition* will be heard by about 1,500 non-members while a pitch during evening jazz will be heard by fewer than half that many. In this example, *Morning Edition* reaches more non-members even though jazz reaches a greater proportion.

prospecting and acquisition activities require an understanding not just of membership, but of how formats are related to *non-membership*.

The sidebar on the opposite page shows how to estimate the number of non-members listening to your station at any particular time. This calculation requires that you combine your station's Arbitron audience estimates with AUDIENCE 88's information about the percentage of each major format's non-member audience:

$$\text{Non-Members} = \text{AQH} \times \text{Format Non-Member \%}$$

That is, the number of non-members in your audience is equal to the average quarter-hour audience at that time multiplied by AUDIENCE 88's estimate of the percentage of listeners to that program or format who are not members.

This calculation is at best an approximation, but this exercise may help explain why certain times of day are more effective at generating members than others. It may, in fact, identify times when

pitching might be intensified, or perhaps even eliminated altogether with no noticeable effect.

What To Say

Maximizing the efficiency with which you reach non-members is one thing; designing the message that best motivates each person to act is another. The key to success is understanding your listening non-members — who they are, what their needs and wants are, and why they listen.

AUDIENCE 88 finds that non-members differ significantly in their demographic, psychographic, and utiligraphic compositions depending on the programming. Tables 32, 33, and 34 display these differences.

Notice that *all information on these tables is for listening non-members — not for the total audience*. Listening non-members are the target; knowledge about them will help public radio professionals develop successful pitches.

Table 32. Psychographic Composition of Program Services' Non-Member Audience. The percentage of each service's *non-member* AQH audience is shown for each psychographic segment. Respondents described their own political outlook and social class; their VALS membership classification was determined through an elaborate method developed by Stanford Research Institute. Programming categories are based on 1986 programming.

	<u>ATC</u>	<u>Classical</u>	<u>Drama</u>	<u>Info</u>	<u>Jazz</u>	<u>ME</u>	<u>Opera</u>	<u>PHC</u>
Need Driven	3.9	2.5	3.9	4.2	7.3	2.6	2.0	1.7
Survivor	3.4	1.5	.5	3.8	5.1	2.2	.0	.1
Sustainer	.5	1.0	3.4	.4	2.2	.4	2.0	1.6
Outer-Directed	36.2	49.5	55.9	43.3	53.7	44.1	54.3	44.4
Belonger	7.2	22.2	27.8	11.1	15.7	10.4	25.5	10.8
Emulator	1.6	2.6	5.3	2.6	6.7	3.5	11.1	2.1
Achiever	27.4	24.7	22.8	29.6	31.3	30.2	17.7	31.5
Inner-Directed	59.8	48.0	40.1	52.5	38.9	53.3	43.7	53.9
I Am Me	2.8	4.6	7.2	2.4	6.0	1.5	2.4	4.9
Experiential	7.5	6.1	2.2	9.5	6.3	11.9	1.1	5.2
Societally Conscious	49.5	37.3	30.7	40.6	26.6	39.9	40.2	43.8
Lower Class	17.1	14.7	25.1	16.5	20.4	13.7	23.5	11.9
Middle Class	57.2	54.7	54.0	60.0	59.0	63.9	46.9	56.2
Upper Class	25.8	30.7	20.9	23.5	20.7	22.3	29.6	31.9
Conservative	16.9	31.2	29.4	21.4	27.5	23.7	26.2	23.0
Middle of the Road	31.4	31.1	37.8	32.1	27.5	29.7	34.3	27.0
Liberal	51.7	37.6	32.8	46.5	44.9	46.6	39.5	50.0

Table 33. Demographic Composition of Program Services' Non-Member Audience. The percentage of each service's *non-member* AQH audience is shown for each demographic segment. Programming categories are based on 1986 programming.

	<u>ATC</u>	<u>Classical</u>	<u>Drama</u>	<u>Info</u>	<u>Jazz</u>	<u>ME</u>	<u>Opera</u>	<u>PHC</u>
Male	59.4	57.9	62.6	60.1	62.0	59.2	51.1	55.9
18-24 Years Old	6.3	6.9	6.3	5.4	8.7	3.1	3.4	4.6
25-34 Years Old	31.4	23.7	14.5	31.1	30.4	36.7	24.8	28.0
35-44 Years Old	31.8	24.2	32.4	29.4	17.0	30.1	18.3	24.2
45-54 Years Old	13.4	12.6	14.2	13.4	14.4	11.5	8.1	19.0
55-64 Years Old	9.5	11.8	25.4	10.5	21.6	9.9	22.8	11.8
65 Years Old or Older	7.6	20.9	7.2	10.3	7.9	8.7	22.7	12.4
Average Age (years)	44.1	46.7	41.9	43.0	44.5	41.5	54.5	42.9
Asian	1.3	1.4	8.7	1.3	2.3	1.7	2.6	.7
Black	4.6	2.9	.1	5.9	25.7	6.8	3.6	5.4
Hispanic	.1	.9	.0	1.0	.7	1.0	.0	.1
White	93.1	94.1	91.2	91.3	71.1	90.0	93.8	93.0
Married	66.4	67.3	47.8	63.2	53.8	63.4	60.4	76.0
Living Together	3.3	2.4	2.9	4.5	6.5	6.3	.8	.5
Divorced, Separated, Widowed	9.8	11.9	3.3	13.5	12.8	14.2	18.0	9.5
Single, Never Married	20.5	18.4	45.9	18.8	26.8	16.1	20.8	13.9
No College	7.0	12.9	25.5	12.0	23.1	12.7	13.8	10.3
1-3 Years of College	20.8	20.6	30.5	22.9	31.6	21.1	27.3	23.9
Graduated College	27.8	31.8	12.3	26.1	18.1	27.3	43.8	28.9
Graduate School	44.4	34.8	31.7	39.1	27.2	38.9	15.0	37.0
Work Full Time	65.2	53.3	33.5	64.7	58.8	69.9	39.5	58.1
Work Part Time	5.8	6.5	13.0	4.4	5.9	3.8	7.4	5.9
Professional-Technician	45.1	37.9	22.0	40.6	32.2	41.7	19.5	40.4
Manager-Administrator	11.7	8.2	6.4	11.6	12.7	13.3	5.2	10.9
Sales-Clerical	10.0	8.1	14.5	9.4	9.0	9.5	22.7	9.3
Crafts Worker	6.0	4.1	1.8	7.1	10.0	8.0	4.7	5.5
Homemaker	7.6	8.3	5.7	9.4	6.6	9.6	5.0	12.2
Student	8.3	6.3	22.4	6.7	9.8	4.3	13.7	5.3
Retired	7.7	20.8	19.6	9.6	14.0	7.4	25.0	11.1
Less than \$10,000 per Year	12.9	7.9	29.2	14.1	15.4	11.3	4.2	8.4
\$10,000-\$19,999 per Year	11.8	19.5	31.8	9.8	17.3	7.0	26.9	12.2
\$20,000-\$29,999 per Year	19.3	21.0	8.6	19.6	19.4	20.6	22.9	17.5
\$30,000-\$39,999 per Year	16.1	14.5	12.7	16.6	12.7	17.2	21.8	15.0
\$40,000-\$49,999 per Year	15.8	12.9	2.9	18.1	16.5	21.6	12.2	20.5
More than \$50,000 per Year	24.1	24.1	14.7	21.7	18.7	22.3	12.0	26.3

Table 34. Utiligraphics of Program Services' Non-Member Audience. The percentage (unless otherwise noted) of each service's *non-member* AQH audience is shown for each utiligraphic segment. Programming categories are based on 1986 programming.

	<u>ATC</u>	<u>Classical</u>	<u>Drama</u>	<u>Info</u>	<u>Jazz</u>	<u>ME</u>	<u>Opera</u>	<u>PHC</u>
Public Radio:								
TSL (average hr:mn per week)	14:54	20:59	20:31	14:30	19:04	14:32	18:56	11:11
Occasions (average per week)	9.9	10.3	9.0	9.5	8.9	9.6	8.1	6.0
Duration (average hr:mn)	1:30	2:02	2:17	1:32	2:09	1:31	2:20	1:52
Loyalty (average)	48.1	57.7	48.9	47.0	49.6	47.7	55.8	35.6
Years Listening (average)	10.0	10.9	7.4	9.1	9.5	8.2	9.8	9.9
Use 2 or More NPR Stations	19.0	15.2	17.0	17.5	14.0	13.5	13.2	15.6
Stations Used/Week (average)	4.1	3.9	4.8	4.0	3.9	3.8	3.5	4.2
Public Radio Utiligraphic Segment:								
Light Fringe	21.6	21.6	23.6	21.5	28.0	20.2	24.9	46.9
Heavy Fringe	19.4	13.7	29.7	18.3	23.3	17.3	36.0	16.4
Light Core	7.7	5.5	1.4	6.9	4.1	7.5	5.6	9.6
Heavy Core	51.3	59.2	45.4	53.3	44.6	55.0	33.6	27.1
Listens to Public Radio:								
1 Day per Week	6.3	12.0	8.4	5.9	13.7	3.6	8.7	36.2
7 Days per Week	20.9	21.0	4.4	21.3	8.8	20.1	25.2	13.6
5 or More Days per Week	62.2	54.1	68.9	65.5	41.0	72.5	39.4	32.6
Weekdays Only	39.7	34.4	17.3	42.3	20.8	47.3	9.8	.0
Weekends Only	2.2	7.5	10.1	2.4	10.2	.0	7.9	42.1
Both Weekparts	58.1	58.0	72.6	55.3	68.9	52.7	82.3	57.9
Home Only	28.5	40.9	41.6	30.0	44.9	27.3	58.7	57.7
Away Only	28.9	27.9	16.2	27.1	27.3	28.3	12.9	7.0
Both Locations	42.6	31.2	42.2	42.9	27.8	44.4	28.3	35.3
Compared to a Year Ago, Listening:								
More to Station	23.4	26.0	12.3	23.2	24.8	21.7	23.2	18.5
Same to Station	61.6	58.4	74.8	60.9	54.2	62.9	63.2	66.9
Less to Station	14.7	14.6	12.9	15.6	18.1	15.4	13.6	13.9
In the Last Year, Public Radio's Programming:								
Has Gotten Better	27.4	22.8	11.0	27.5	35.2	25.6	23.8	20.9
Is About The Same	63.8	65.2	75.4	62.7	55.8	64.1	59.2	67.4
Has Gotten Worse	4.3	5.1	13.6	6.3	4.9	8.1	5.1	3.3
Learned About Public Radio Station From:								
Scanning Radio Dial	53.7	56.7	73.1	55.2	68.9	55.2	53.1	45.0
Friend or Relative	22.7	19.1	9.2	23.1	17.4	24.6	16.5	24.9
Newspaper	3.9	1.4	1.4	4.5	3.1	4.7	.9	8.1
Public Radio is Important to Others:								
Strongly Agree	60.2	45.6	20.8	56.8	44.4	54.0	53.6	46.1
Moderately Agree	33.2	42.6	75.0	36.1	48.4	37.4	36.2	45.3
Disagree	6.4	11.6	4.2	6.9	6.6	8.4	10.1	8.6
Public Radio is Personally Important:								
Strongly Agree	44.4	32.9	21.3	43.4	25.5	43.4	26.3	33.2
Moderately Agree	40.6	50.6	45.4	43.3	59.4	43.1	64.4	47.5
Disagree	15.0	16.4	33.3	13.3	15.1	13.5	9.4	19.3

The different non-member audience compositions among programs and formats call for decidedly different mixtures of and emphases on appropriate pitches. For example, Table 33 compares the demographics of target listeners to jazz and to *All Things Considered*. Non-member *All Things Considered* listeners tend to be more educated than non-member jazz listeners. Since education strongly influences occupation, non-members who listen to *All Things Considered* are more likely than their jazz counterparts to hold professional and technical positions. Jazz's non-members are somewhat younger than *All Things Considered*'s.

Keeping this demographic information in mind will greatly aid your development and delivery of more effective on- and off-air messages.

Focusing on VALS

In addition to determining the demographic and utiligraphic traits of listening non-members, AUDIENCE 88 introduces the psychographic segmentation system of VALS and applies it in the same manner. Just as demographics describe who listeners are, psychographics describe how people think. And like demographics, psychographic differences can also play important roles in crafting pitches for specific program types.

For instance, as Table 32 shows, *All Things Considered*'s non-member audience is more likely to be Inner-Directed (primarily Societally Conscious) than jazz's non-member audience, which is more Outer-Directed (primarily Achievers).

AUDIENCE DIVERSITY

AUDIENCE 88 focuses on listener characteristics that are powerful predictors of listening and support. These traits are emphasized because they are useful in explaining behavior, not because they describe public radio's listeners as individuals.

Although important analytically, listener traits can create misleading impressions about the diversity of public radio listeners.

For instance, a characteristic may be useful in describing a group of listeners, to public radio generally or to a particular program or format. But that does not mean that *all* public radio listeners share that characteristic.

Similarly, public radio's audience is remarkable for its level of educational attainment. But this does not mean that *all* listeners are well-educated. Although 85 percent of the weekly audience have attended at least one year of college, 15 percent have not; indeed, 3 percent have not graduated from high school. These are not children: AUDIENCE 88 studies only listeners 18 years old or older.

Further, even when listeners have one trait in common, AUDIENCE 88 documents many ways in which they are a diverse group of individuals. While 9 in 10 (91%) AUDIENCE 88 respondents are white, 6 percent are black, 2 percent are Asian, and 1 percent is Hispanic. Half of public radio's audience is male, half is female.

Listeners also express great diversity in the ways they describe themselves. For instance, half (52%) of the individuals in the weekly come consider themselves middle class; 36 percent say they are upper-middle or upper class; and 12 percent think of themselves as lower or lower-middle class.

Politically, almost half (46%) of the individuals in the weekly come consider themselves liberal; 26 percent think of themselves as "middle of the road"; and 28 percent say they are conservative.

It is crucial for the reader to distinguish between AUDIENCE 88's segmentation analysis — which by its nature focuses on the similarities of listeners — and stereotypes and clichés.

Inner-Directeds contrast with Outer-Directeds in that they conduct their lives primarily in accord with inner values — the needs and desires private to the individual. Outer-Directeds conduct their lives in response to external signals; consumption, activities, and attitudes are guided by what the Outer-Directed individual believes others will think.

There is a whole body of research into the consumption patterns, attitudes, and activities of the personality types described by the VALS system. (AUDIENCE 88's *Terms & Concepts* handbook outlines the characteristics of the individuals in each group.) Based on this research, the examples on the following two pages show how pitches might be targeted at the most prevalent Inner- and Outer-Directed groups of listening non-members — the Societally Conscious, Achievers, and Belongers.

On-Air Pitch Rotation

While different programs and formats contain heavier mixes of one type of listener than another, other types of non-members are always listening. Depending on the composition of the audience at

any given time, you might create a repertoire of pitches to be used with various frequencies.

For instance, classical music's average non-member audience is evenly split between Inner-Directeds (most of whom are Societally Conscious) and Outer-Directeds (evenly split between Belongers and Achievers — two very distinct groups). Given this combination, you may decide to rotate your pitches accordingly: one Belonger pitch, one Achiever pitch, two Societally Conscious pitches.

Compare this with *All Things Considered*, for which the mix should be closer to one Achiever pitch for every two Societally Conscious pitches, with no other group showing dominance.

The VALS-based considerations discussed in this section are certainly not the only audience traits on which to base pitches. 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. Tables 32, 33, and 34 contain a wealth of programming-specific demographic, utiligraphic, and psychographic information that can help you hone your on-air messages.

PITCHING WITH VALS

Inner-Directed Messages

Half (48%) of all non-member public radio listening is done by Inner-Directed persons. Of particular importance is the Societally Conscious group, which accounts for three in four Inner-Directed listeners. Overall, Societally Conscious listeners account for 35 percent of all non-member public radio listening.

Inner-Directed Societally Conscious people tend to be reflective, thoughtful, substantive, and caring. As you're talking to them, put yourself in Inner-Directed shoes; use an intimate, introspective tone. Then consider the following characteristics:

- Inner-Directeds tend to be socially responsible.
 - “Public radio provides in-depth coverage of local and national issues — the kinds of issues and social concerns you won't find covered anywhere else.”
 - “On public radio you meet the people behind the issues. You get firsthand information, not secondhand edits.”
- Inner-Directeds are intellectual and artistic. They consider personal growth important. They do things to stretch the mind.
 - “Where else but on public radio can you get news and information programming that stimulates and challenges your mind?”
 - “On public radio you not only get the news, but you get in-depth, intelligent reporting that takes you to new and interesting places.”
- Inner-Directeds are interested in the arts and aesthetics, and attend cultural events.
 - “With public radio, the symphony, the theater, and the museum are as close as your radio.”
- Inner-Directeds are concerned about the environment and conservation.
 - “Public radio covers the environmental issues affecting your community, your family, and you.”

Psychographic information can also help determine the premiums that will appeal to listeners. The following should be attractive to Inner-Directeds:

- Travel: Cruises, excursions, airplane tickets
- Hi-tech: CD players, Walkmans, computer products
- Photography: Video and 35 mm. cameras, VCRs
- Recreation: Backpacking and hiking equipment, boating equipment, gift certificates to 4-star restaurants
- Arts and culture: Antiques, paintings, prints, art objects
- Cultural events: Symphony, theater, or museum tickets, wine-tasting party invitations
- Education: Books, tapes, subscriptions to magazines like *Smithsonian* and *National Geographic*, tickets to lecture series

Outer-Directed Messages

Conversely, there are formats for which you will want to develop messages that meet the needs and wants of the Outer-Directed personality. Half (48%) of all non-member public radio listening is done by Outer-Directed persons. (The third major VALS category — Need Driven persons — accounts for only four percent of all listening done to public radio by non-members.)

Achievers constitute over half of Outer-Directed listening; they account for 28 percent of all non-member listening to public radio. Messages for these listeners should be practical, logical, and direct. Make them heroes; make them feel good about themselves; appeal to their egos.

- Achievers are goal-oriented; they seek fame, power, and material success. They also tend to be planners; they like to accomplish a lot.
 - “Public radio brings you the radio listening pleasure you deserve — the best of the best in (format) entertainment.”
 - “You’ll receive extraordinarily high dividends on your investment in public radio’s future.”
 - “Your contribution will help public radio meet its needs and will assure your (format) listening pleasure.”
- Achievers care what others think of them.
 - “The community’s most prominent citizens support public radio.”
 - “(Famous artists) salute their fellow listeners who support public radio’s programming.”
- Achievers are decisive, direct, driving, and competitive. They are also logical and practical.
 - “Your membership dollars are spent wisely; 100 percent of your contribution is spent on updating our CD library to assure you the highest quality in (format) entertainment.”
- Challenge grants appeal to Achievers. Solicit challenge grants from — and pitch challenges to — these listeners.

Once again, psychographics assist in determining premiums that appeal to Achievers.

These examples are generated from the extensive body of VALS research and are prompted by AUDIENCE 88’s finding that public radio’s non-member audiences comprise relatively high concentrations of particular VALS types. The effectiveness of these examples has not been tested.

- Travel: Airplane tickets, cruises, excursions, brand-name luggage, briefcases, portfolios, calendars
- Hi-tech: Computers and computer-oriented products, CD players, Walkmans
- Recreation: Golf equipment, tickets to spectator sports, gift certificates to fine restaurants
- Education: Business-oriented audio and video tapes, self-improvement and investment tapes and seminars

Belongers are the other major Outer-Directed type, constituting over one-third of all Outer-Directed listening by non-members. Belongers account for 17 percent of all non-member listening to public radio.

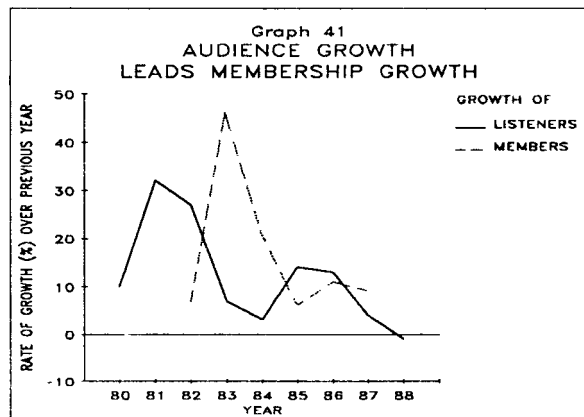
- Belongers are home-loving, family-oriented, and like to feel part of a group.
 - “Why go out to the opera when you can enjoy the finest in opera in the comfort of your own home?”
 - “Become a member of the public radio family.”
- Belongers are savers.
 - “Going to concerts is expensive. For the price of two seats public radio brings you the finest performances every day.”
 - “Become a member now and you’ll save 10% off the regular rate and receive our program guide throughout the year.”

Premiums that should be attractive to Belongers include: recipes, kitchen utensils, how-to books, gardening tools, flower bulbs, subscriptions to home and gardening magazines, discount coupons, and other home and family items. Belongers particularly appreciate American-made goods.

AUDIENCE LEADS MEMBERSHIP

Audience growth precedes membership growth. The more new listeners a station serves this year, the more new members it can gain in a couple of years. Similarly, decreases in new listener growth rates portend corresponding decreases in new member growth rates one to three years down the road.

Graph 41 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).



4.

THE DIMINISHING RETURNS OF ON-AIR PLEDGE DRIVES

As public radio's rate of new-member growth outpaces its rate of audience growth, on-air pledge drives — the backbone of most stations' membership activities — will fall victim to their own success. On-air drives will become significantly less effective in generating new members, and their negative side effect of frustrating members' use of the station will become significantly more pronounced.

During the last few years most stations have gained members at a faster rate than they've gained listeners. In fact, many continue to increase their memberships despite no significant growth in their audiences.

The *Cheap 90's* finding that audience leads membership (see sidebar on page 26) predicted this membership success; audience increases of previous years made it possible and hard work by membership professionals made it happen. AUDIENCE 88, however, predicts harder times ahead.

Several forces are working against public radio's quest for new members: (1) the lack of significant audience growth over an extended period; (2) the shrinking pool of listening non-members; (3) the growing distinction between members and non-members; and (4) the mechanics of on-air pledge drives that make them less efficient in this environment.

The Emptying Pool

It takes time for a new listener to become a member. A person's extended and regular use of a station and the perception that it is personally important do not come about overnight. For most new supporters, one to four years have elapsed since they began listening to their public station on a somewhat regular basis.

The result is that *audience leads membership*. 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 years later. But when a station experiences a period of little audience growth, or when its membership growth outpaces its audience growth, the rate at which its listeners become new members must eventually decline.

This is mathematically necessary. 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.

Not only does the level of the potential member pool recede, but the people remaining in it become increasingly unlikely to become members. These listeners tend to be older; they are likely to be Belongers. More importantly, they listen to the station much less, and consider it much less important in their lives, than the non-members who have left the pool to become members. In short, they are much less inclined ever to support public radio.

As these demographic, psychographic, and utiligraphic differences widen, membership professionals will find it increasingly difficult to lure new members from the pool. When a station catches fewer new members each time it casts its line, it has reached a point of *diminishing returns*. Finally, as the following pages demonstrate, on-air drives — the most successful new member lure in use — will become increasingly less efficient and effective in this new environment.

THE REACH AND FREQUENCY OF ON-AIR PLEDGE 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* reports the number of times persons in this segment hear a pledge break.

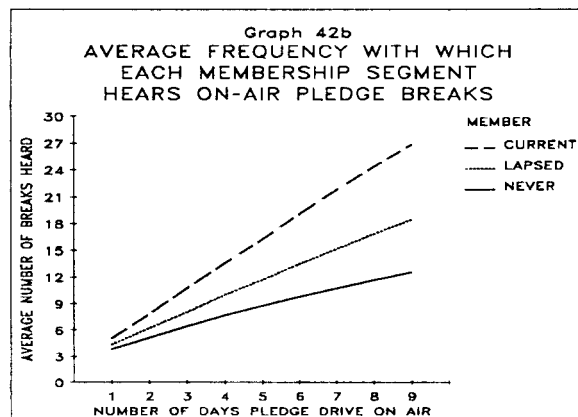
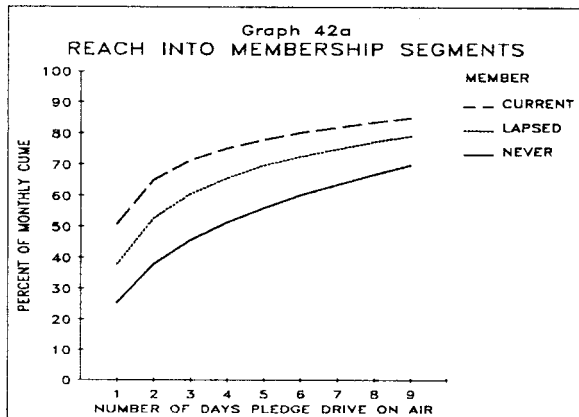
Graph 42a shows the percent of current, lapsed, and never-members who hear a pledge drive lasting between one and nine days. The percentage shown is of the number of current, lapsed, and never-members who listen to the station over the course of a month. (This analysis assumes all listeners tune in at least once per month.)

In the first day of a pledge drive, or during the entirety of a one-day drive, over half (51%) of the station's members will hear at least one pitch, compared to only one-quarter (25%) of those who have never been members. Indeed, it takes four full days of on-air pitching — two breaks per hour, 18 hours per day — to reach half of all never-members with at least 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. (Graph 42b shows the average number of pledge breaks heard by the listeners reached.) This relatively long reach and high 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; no wonder they perceive on-air drives to be more pervasive than they really are. In focus groups members report that they tune to other stations or turn off their radios to avoid on-air drives. Rather than interpreting these numbers as actual listening, it is more precise to read them as indicators of intended or discouraged use.

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



Reach estimates are based on listeners' use of their public station as ascertained by AUDIENCE 88. They 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.

Why On-Air Pledge Drives Work

For more than a decade stations have harvested tens of thousands of new members over the air each year. Because on-air pledge drives generate income quickly and surely, they are central to most stations' membership activities.

On-air pledge drives have always worked because there have always been fresh listeners in the non-member pool. When stations first took to the air for support, all listeners were non-members. Many people in the audience had been listening for some time; they relied on their public station and considered it personally important. When asked for the first time to support it, a large number did.

In the early 1980s most public stations experienced a period of intense audience growth. New listeners were added constantly to the non-member pool; they too responded readily to membership pitches as they came to rely on public radio.

Even though this period of intense audience growth has ended for many stations, on-air drives continue to work for two reasons. First, since audience leads membership, there is a time lag of two or three years. If a station's audience growth ended a couple years ago, diminishing new membership rates are just now due to appear.

Second, as the sidebar on the opposite page demonstrates, *on-air pledge drives bring in new members because they reach a significant number of listening non-members often enough to get them to pledge.*

Pledge drives of four days or longer are heard by more than half of a station's listeners who have never been members. Drives of nine days in length reach two-thirds of this prime target. After the fourth day, persons in the target have heard an average of 7.6 pledge breaks.

On-air drives do an even better job of reaching members. Members are more likely to hear on-air pitches than non-members because they listen more often; they hear more on-air pitches than non-members for the same reason. After four days, over three-quarters of all members have heard an average of 13.5 breaks. In fact, over half of all current members hear an average of five pitches on the *first day* of a drive.

Unfortunately, these are inevitable side effects of on-air drives. Not only is there mounting evidence that their longer reach and higher frequency among members generate negative feelings (see the sidebar on page 30), but these side effects will worsen as a larger proportion of listeners become members.

Victims of Their Own Success

As the pool of listening non-members is drained, on-air drives become both less efficient and less effective. With each successive drive, membership messages will reach fewer non-members less often, yielding fewer new members. At the same time, each drive will reach more members more often, causing even more disruption to their listening. This is the exact opposite of what needs to happen.

On-air pledge drives ultimately succumb to their own success. While eliminating them will be too risky for many stations, they will need to be augmented by techniques that have a longer and more frequent reach into the target of listening non-members — techniques that spend less time “preaching to the converted.”

Furthermore, with no significant influx of new listeners, the evaporating pool of non-members essentially becomes stagnant and less capable of yielding great numbers of new members. *All* techniques that fish the non-member pool will need to adapt to this new situation.

Consequences

How membership professionals use this information depends on their station's situation. If their station has been 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, membership professionals should continue striving to make their messages more sophisticated, more intelligent, more “listener-sensitive” in order to minimize the 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.

NEGATIVE SIDE EFFECTS

Public radio enjoys the best educated audience of any electronic mass medium. It also suffers the lowest time spent listening of any comparable radio format. These facts are not unrelated. As numerous studies have shown, well-educated people are the most knowledgeable about their media choices. They are also the most selective. Their higher incomes allow them to purchase other media — print, audio, and video options — when they don't get what they want or need over the air.

This suggests that public radio's audience has a very low tolerance for the disruption of program service. Unfortunately, the pitches delivered during on-air membership marathons disrupt the program service that listeners — particularly members — tune in to hear.

Listeners have many other alternatives; many, if not most, exercise them during pledge breaks. This is not an AUDIENCE 88 finding. Instead, it is a conclusion of almost a dozen sets of focus groups conducted at public stations across the country in the last few years.

In virtually every case, listeners responded spontaneously and vehemently against public radio's on-air pledge drives. Many things about the drives annoy listeners, but what annoys them the most is that the programming they tune in to hear — the programming that many pay to maintain — is interrupted, displaced, or preempted altogether. (Hence the name "breaks.")

According to listener comments offered in focus groups, public broadcasters who think that their drives provide listeners with truly exciting and interesting programming are only fooling themselves. Listeners say that they check out other public or commercial stations, or turn off their radios, until regular programming is restored.

At the stations where focus groups have been conducted — and probably at many more — on-air drives are disrupting use of the station enough to generate significant levels of listener discontent. AUDIENCE 88's reach and frequency analysis demonstrates the mechanics of this disruption.

Although AUDIENCE 88 does not explicitly track listening during pledge breaks, its central concept of appeal clearly suggests why pledge breaks cause such frustration among listeners. No matter how well done, a pledge break's appeal is not the same as the appeal of the programming it preempts. It's not that the break has no appeal — it's that it has *negative* appeal. To use an appeal term discussed in AUDIENCE 88's *Programming* report, pledge breaks *repulse* listeners.

The more successful a station is with membership activities — the larger its ratio of members to listening non-members becomes — the more on-air drives disrupt listening by members, and the less efficient and effective they become in garnering new members.

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 is based on the premise that a station’s programming is not serving enough people who find it important enough to support it financially. This may be because the programming itself is weak; this may be because the group to which it appeals is too small to meet the station’s financial needs.

The second option assumes that the basic thrust of a station’s programming could have stronger appeal to existing listeners and could also appeal to a larger number of people than those who now use it regularly. By making marginal changes to strengthen appeal and increase accessibility, the station will become more important to current listeners and more likely to be used by other people like them.

The first option would be likely to have adverse membership consequences in the short term. To the extent new programming initiatives fail to appeal to current members, they will fail to renew their support. The further the 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. As noted throughout this report, that process may take several years.

The second option can reap immediate membership rewards. By building on the existing listener base, this strategy changes in listening and perceptions that will move listeners “across the threshold” to membership. Current members are less at risk; many may be even more inclined to renew their support.

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

AUDIENCE 88 informs this work by providing a better understanding of the relationships between programming, members, and non-members. It links actions that might be taken to reactions that might be expected. It puts public broadcasters in control of new knowledge, and leaves them with the responsibility and challenge to put it to work.



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

Audience 88 Newsletter

by David Giovannoni
(24 pages)

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"Underwriting Report Released." Audience 88 Newsletter, No. 2, Corporation for Public Broadcasting, 1988.

"The Picture Emerges." Audience 88 Newsletter, No. 3, Corporation for Public Broadcasting, 1988.

"The Changing Membership Environment." Audience 88 Newsletter, No. 4, Corporation for Public Broadcasting, 1988.

"Making Choices: Strategies and Targets." Audience 88 Newsletter, No. 5, Corporation for Public Broadcasting, 1988.



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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.

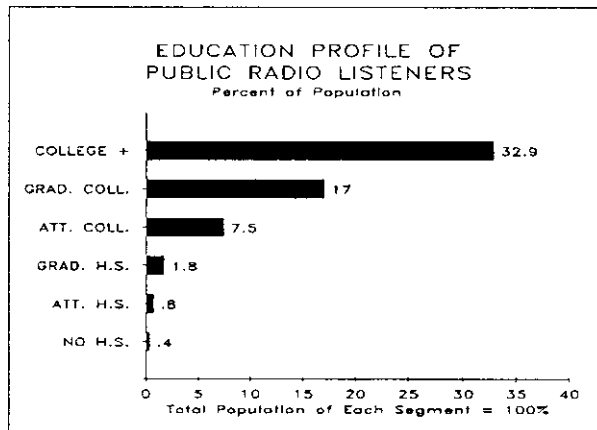
These profiles are obtained by merging demographics—*who listeners are*; geodemographics—the kinds of *neighborhoods in which listeners live*; psychographics—*what listeners think*; lifestyles—*how listeners live*; and putting all this together with information about *how listeners listen* both to public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

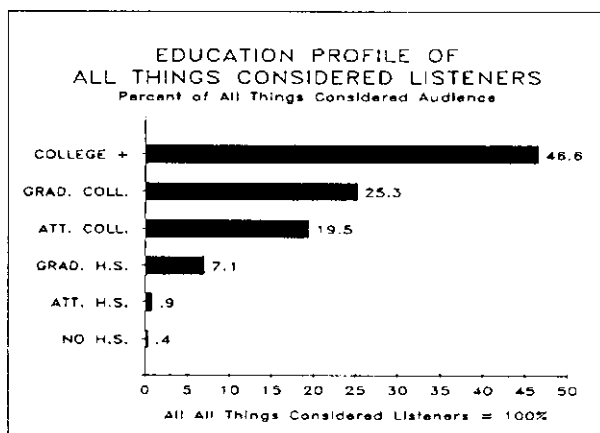
This information practically points a finger at potential underwriters. Businesses that sell or are associated with high-quality stereo equipment, com-

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.

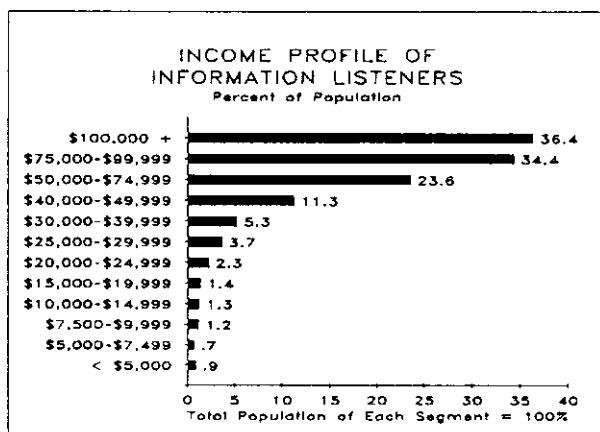
A CLOSER LOOK

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.

Continued on p.3

THE AUDIENCE 88 DATABASE

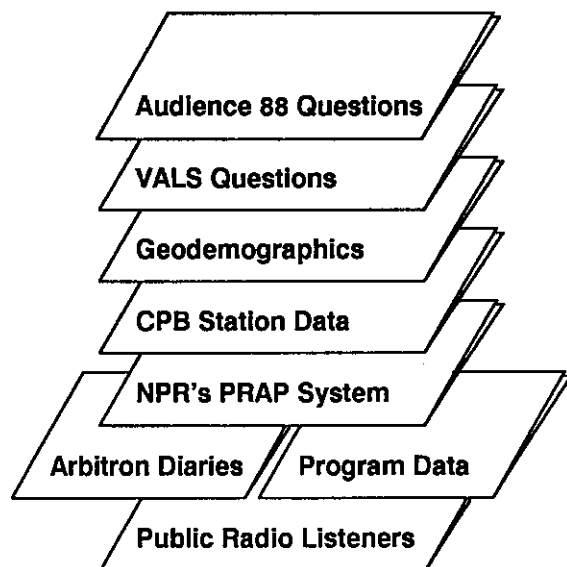
USING THE NUMBERS

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

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

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

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



...AND WHERE THEY COME FROM

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

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

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

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

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

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

Continued from p. 1

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

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

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

The "heavy core" listeners, only a little more than a quarter of the audience, account for two thirds of all listening to public radio. In contrast, the "light fringe," half of public radio's weekly listeners, listen more to some other station, spend less than six hours a week with their public station, and account for only 14.8 percent of all listening.

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

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

Assuming no major changes in programming,

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

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

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

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

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

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

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

A DIFFERENT KIND OF LISTENER

AUDIENCE 88 affirms several demographic characteristics of public radio listeners that have been reported in prior studies. Education is at the top of the list. Public radio listeners are significantly better educated than the U.S. population as a whole. People who have attended college are more likely to listen to public radio than other Americans. The further people pursue their education, the more likely they are to pursue public radio.

This educational attainment correlates highly with income and profession. People with a household income over \$25,000 are more likely to listen to public radio; those with incomes below \$25,000 are less likely to do so. Over half of public radio's listeners hold professional, technical, managerial, and administrative positions. Public radio listeners are concentrated in the 35-44 year old age bracket—America's best-educated age group.

Looking beyond demographics, AUDIENCE 88 has broken new ground by developing values and lifestyle profiles of public radio listeners. These profiles were ascertained through a series of questions and demographic indicators developed by the Stanford Research Institute and administered as part of the AUDIENCE 88 questionnaire.

A particular values and lifestyle personality type—Inner-Directed, Societally Conscious—has emerged as an extraordinarily powerful predictor of public radio use. These people are concerned about society as whole, have a strong sense of social responsibility, and act on their beliefs; they are interested in arts and culture, enjoy reading and the outdoors, and watch relatively little television. They are only 11 percent of the U.S. population; they are 41 percent of the public radio audience.

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

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

scriptive power. Over half of public radio's "core" audience is Societally Conscious, compared to a third of the "light fringe." Educated Americans are not only more likely to listen to public radio, they listen longer than other listeners ("heavy") and are more loyal ("core"). Over 70 percent of public radio's "core" listeners have graduated college, and nearly half (46 percent) went on to graduate school!

In sum, while public radio serves millions of Americans from all walks of life, it speaks in an especially compelling way to a certain kind of listener. We see these people most clearly in the "core" audience, but they shape the overall audience as well: Inner Directed, Societally Conscious, highly educated, professionally employed, fairly well-off financially, and entering their middle years.

A SPECIAL KIND OF APPEAL

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

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

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

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

The Demographics of Utiligraphic Segments.

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

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

The Values and Lifestyles of Utiligraphic Segments.

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

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

THE "ELITISM" ISSUE

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

PROGRAMMING DEFINES THE AUDIENCE

Public radio has been guided by a mission crafted almost exclusively in terms of content: programs of quality, excellence, and diversity; in-depth reporting and commentary; the best of our society's culture and artistic expression.

Even as programmers have become "audience aware," concerns have been expressed in terms of the number of listeners, and the extent of their listening, rather than the composition of the audience as a whole.

AS AUDIENCE 88 makes clear, however, each content choice, together with form and style of presentation, generates a specific appeal that, in turn, defines an audience. While the audience consequences were almost never explicitly addressed—or even understood—public radio's pursuit of its content-oriented mission nonetheless has created a distinctive and measurable audience response that AUDIENCE 88 is now reporting.

What AUDIENCE 88 is reporting is the audience public radio has defined by its programming—people who yearn for in-depth journalism and find public radio's selection of musical genres more engaging than those on commercial stations.

Public radio's programming, shaped by a content-oriented mission, has been the most important factor in defining the public radio audience.

PEOPLE DEFINE THE PROGRAMMING

More than mission is at work here. America's public radio system was built on a foundation of stations licensed to colleges and universities and staffed by the people drawn to these institutions. Journalism, music, and cultural choices were filtered

Continued on p. 8

ADVERTISING AND PROMOTION

CRAFTING AN INTELLIGENT INVESTMENT

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

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

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

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

TARGETING

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

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

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

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

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

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

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

THE OCCASIONAL LISTENER

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

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

have a Heineken."

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

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

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

THE REGULAR LISTENER

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

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

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

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

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

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

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

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

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

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

THE "ELITISM" ISSUE

Continued from p. 5

through the standards and world view of the higher education community. In translating the broad outlines of mission to the specifics of programming, the culture and values of those institutions were indelibly imprinted on the resulting service.

It should be no surprise, then, that the most powerful demographic indicator of public radio listening is education. The highly educated listeners at the core of public radio's audience are responding to a service that reflects the values, attitudes, and views of the academy—values held in high esteem by society at large and themselves in particular. In short, the service and the listeners are cast from the same mold.

IS THERE A PROBLEM?

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

And for all the upscale tilt of those who listen, public radio is available to every citizen. It offers an open door to the concert hall and the press club, the texture of life in far corners of the globe, and dozens of other opportunities that are largely unavailable to the common man and woman.

At the same time, tax-based support for public radio fuels expectations of service for the public at large. The Corporation for Public Broadcasting's mission speaks of programming for "all Americans."

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

THINKING ABOUT CHANGE

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

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

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

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

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

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

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

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

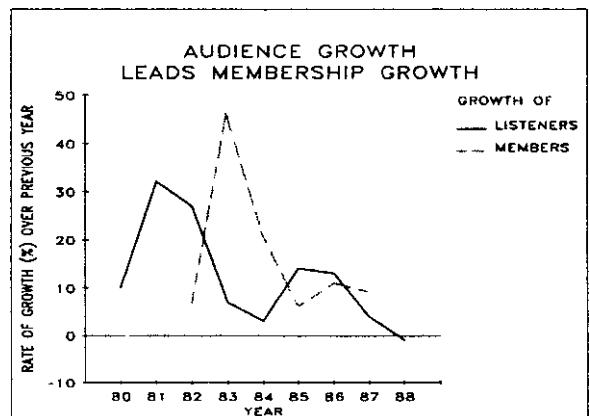
Reach and frequency analysis explains the success of on-air drives, illuminates why members find them so pervasive, and predicts their eventual decrease in effectiveness. Reach is the proportion of an audience segment that hears at least one pledge break. Frequency is the number of times people in this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

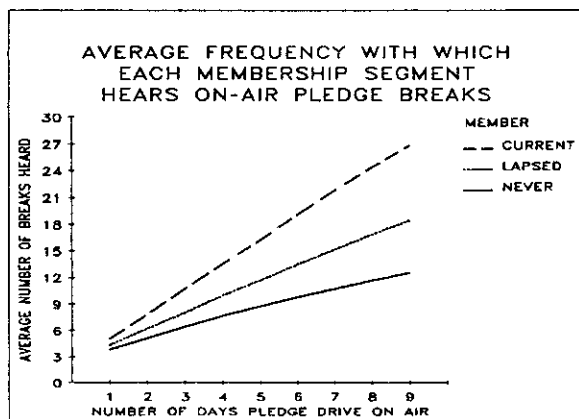
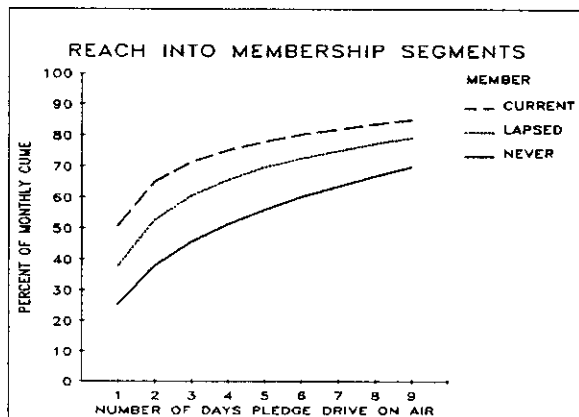


frequency are the reasons why on-air drives bring in the number of new members that they do.

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.

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by David Giovannoni
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Programming

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A COMPREHENSIVE ANALYSIS
OF PUBLIC RADIO LISTENERS

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FOREWORD

Public radio's current audience is no accident; the audience five years from now will be no accident, either. *Programming causes audience.* The decisions we make about programming — its content, its form, and the media through which it is delivered — will determine whom public radio will serve — and whom it will not.

Effective programming decisions require a clear and accurate understanding of the relationships between programming and individuals. In 1986, the Corporation for Public Broadcasting funded a comprehensive study of these relationships. AUDIENCE 88 is the result.

Ted Coltman and Ric Grefé at CPB's Office of Policy Development & Planning realized AUDIENCE 88's potential; their active support convinced the Corporation to invest in the project, and they have backed and guided it ever since. Joe Gwathmey and Doug Bennet at National Public Radio also saw the possibilities, and through the good offices of Effie Metropoulos contributed the Public Radio Audience Profile (PRAP) database, the giant upon whose shoulders AUDIENCE 88 stands. The staff and members of the Public Radio Program Directors and the Radio Research Consortium have been extraordinarily encouraging throughout all phases of this study.

AUDIENCE 88 adopts an interdisciplinary approach to audience research. Three of public broadcasting's foremost thinkers and leaders — Tom Thomas, Terry Clifford, and Linda Liebold — brought to the project a level of expertise gained through years of work in and dedication to public telecommunications. Each team member enthusiastically subjected their most fundamental assumptions to the purifying fires of new data. None of our assumptions remains unchanged — all have been destroyed, reshaped, or tempered as a result.

New ways of thinking require a new vocabulary to express these thoughts with clarity and precision. The AUDIENCE 88 team has spent a great deal of time thinking through the concepts and the words that best communicate them. The good words of two others are also worthy of note. In 1980, Sam Holt invented the word "utiligraphics" to communicate the "usage-based segmentation schemes" I was then developing for NPR's PRAP system. And last year, George Bailey applied the word "affinity" to our concept of congruence and divergence of appeals, generated in our work for commercial clients.

The AUDIENCE 88 team is grateful to all persons who have offered their own good words, comments, and suggestions — all of which have helped the presentation of this study.

David Giovannoni

Derwood, MD
June 1988

1.

INTRODUCTION

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 at least one public station.

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

Public radio is not unique in this way. Indeed, it's the nature of all stations to attract certain types of individuals and to repel others. Radio is a mature, highly competitive, and highly segmented enterprise. Even the most successful commercial stations aspire to reach only a portion of the listeners in their community. The average American has dozens of stations from which to choose, yet most will listen to fewer than three in a typical week.

It's as if public radio were a magnet. It attracts certain types of people very strongly; on others it exerts only a weak or sporadic pull; most people it leaves unmoved. Some are even repulsed by it. The "magnetic" attraction of an audience to a station, or to a particular format or service on that station, is called *appeal*. Appeal is the basis for understanding — and controlling — the relationship between programming and the listeners it serves.

Appeal is inextricably linked to the concept of audience segmentation. An audience segment is a group of listeners who are pretty much alike among themselves, but who are different compared with people not in the segment. The study of audience segments is the study of significant differences.

AUDIENCE 88 finds that:

- individuals who listen to public radio are significantly different from those who do not;
- individuals who make a public station their favorite are significantly different from those who use other stations more;
- these differences extend to the kinds of listeners who are attracted to the distinctive formats and services that public radio offers;
- people who feel that public radio is important in their lives are different from people who do not consider it so; they are different not only demographically and psychographically, but in their use of their public station and in their propensity to support it.

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, each strand of public radio programming has its distinctive *appeal*, its unique resonance with a particular constituency of listeners. In other words, different types of programming appeal to distinct audience segments.

Therefore, through their control of programming, programmers can exercise great control over the audience served. All that is required is an understanding of the relationships between programming and audience segments, and a willingness to apply this knowledge toward the programmer's ends.

TERMS TO KNOW

To gain the most from this report, it is important to understand some basic terms defined below. For more specific information see the AUDIENCE 88 Terms & Concepts handbook.

Demographics: Measures of *who listeners are*; age, gender, education, occupation, income, and other personally descriptive measures.

Geodemographics: Measures of *where listeners live*; their neighborhood type according to PRIZM or ClusterPlus definitions.

Utiligraphics: Measures of *how listeners listen* to public radio and to radio in general.

Psychographics: Measures of *what listeners think*; interests, opinions, values, attitudes, beliefs, lifestyles, personality traits, etc. Based on psychological, as distinguished from demographic, dimensions.

Lifestyles: Measures of *how listeners live*; broad measures include sophistication and venturesomeness; specific measures include purchasing habits, inclination to set or follow trends, and predisposition to try new products and services.

Values: Basic attitudes and beliefs.

PRIZM: A geodemographic approach to consumer market segmentation invented by Claritas, Washington, DC. All U.S. neighborhoods are classified into 40 neighborhood types according to their similarities over precise census measures.

ClusterPlus: A geodemographic approach to consumer market segmentation developed by Donnelley Marketing Information Services, Stamford, CT. All U.S. neighborhoods are classified into 47 neighborhood types according to their similarities over precise census measures.

VALS (Values and Lifestyles): Developed by Stanford Research Institute, Menlo Park, CA, VALS segments persons into nine distinct types reflecting basic attitudes and beliefs.

Inner-Directed: A VALS term describing people who conduct their lives in accord with inner values — the needs and desires private to the individual — rather than in accord with the values of others.

Outer-Directed: A VALS term describing people who conduct their lives in response to external signals. Consumption, activities, attitudes — all are guided by what the Outer-Directed individual thinks others will think.

Societally Conscious: The Inner-Directed VALS type most associated with public radio. Forty-two percent of public radio listeners are Societally Conscious. They have a profound sense of societal responsibility. Their concerns extend beyond themselves and others to society as a whole.

Achievers: One of the Outer-Directed VALS types. Twenty-six percent of public radio listeners are Achievers. They are competent, self-reliant, hard-working, and oriented to fame and success. They are affluent people who strongly influence the economic system in response to the American Dream.

Experientials: Another Inner-Directed VALS type. Nine percent of the public radio audience are Experientials. They are people who want direct experience and vigorous involvement. They are artistic and the most passionately involved with others.

Listeners and Non-Listeners

Two-thirds of the people listening to public radio at this very moment will use their public station more this week than any other station. These listeners, for whom public radio is their favorite station, comprise public radio's *core* audience. Core listeners are those to whom public radio appeals the most; they feel the most "connected" to its programming; it resonates with their inner-most feelings and beliefs.

Who are these people? Most are well educated. Indeed, formal education is the factor that best distinguishes public radio listeners from non-listeners. The farther people pursue an education, the more likely they are to pursue public radio.

With better educations come better jobs, higher incomes, and all of the demographic traits examined in the AUDIENCE 88 *Underwriting* report.

Looking beyond demographics, AUDIENCE 88 finds significant *psychographic* differences between listeners and non-listeners. It uses a personality typing system developed by the Stanford Research Institute called VALS — Values and Lifestyles. (Refer to the AUDIENCE 88 *Terms & Concepts* volume for detailed information about VALS and other segmentation schemes used in this analysis.)

A particular VALS personality type — *Inner-Directed, Societally Conscious* — emerges as a very powerful predictor of public radio use. Societally Conscious people are concerned about society as a whole, have a strong sense of social responsibility, and act on their beliefs. They're interested in arts and culture, enjoy reading and the outdoors, and watch less television than other people. They make up only 12 percent of the U.S. population, yet they account for 42 percent of public radio's weekly audience.

Public radio also appeals to another Inner-Directed group of individuals — *Experientials*. Although they represent six percent of the U.S. population, Experientials account for nine percent of public radio's audience. In a way, Experientials can be thought of as younger, less mature, Societally Conscious individuals. They crave direct experience and vigorous involvement. The most Inner-Directed of any VALS group, these people tend toward the artistic.

What is the appeal of public radio for the Societally Conscious and Experientials? Their interest in the arts and culture, combined with their tendency to travel and experience life, make them prime candidates for much of public radio's programming. Their concern about society and the world around them draws them particularly to public radio's news and information programming.

Experientials and Societally Conscious listeners compose the Inner-Directed contingent of public radio's audience. *Achievers* are these listeners' *Outer-Directed* counterparts.

One in four public radio listeners is an Achiever. Unlike Inner-Directed listeners, public radio's Outer-Directed Achievers are strongly influenced by social norms and driven by what society holds up as "achievement."

Achievers tend to be materialistic, hard-working, and oriented to success; competence, self-reliance, and efficiency are important to them. Many professionals, business leaders, and elected officials are Achievers.

Achievers tend to enjoy some of the same activities as the Societally Conscious, but they are not very interested in the arts, nor do they find much time to attend cultural events. Because they are focused on success, many Achievers enjoy programming that helps them get ahead professionally and financially.

Societally Conscious individuals, Experientials, and Achievers account for 39 percent of the U.S. population; yet they comprise over three-quarters (76%) of public radio's audience. They are the persons to whom public radio programming appeals the most.

This knowledge is important because it indicates that *education, income, and many other characteristics associated with public radio listeners are just reflections of underlying personality traits, traits that drive these individuals toward information and education, and toward the creative and the challenging — whether they are captains of industry or artistes.*

Whereas education *describes* public radio's audience, the VALS typologies seem to come much closer to *explaining* it.

THE AUDIENCE 88 DATABASE

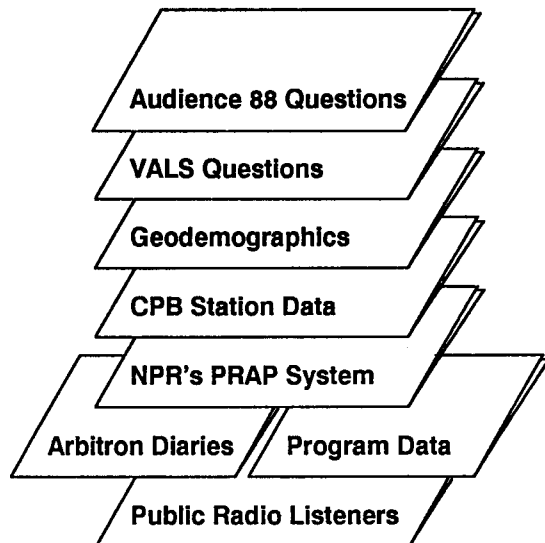
USING THE NUMBERS

Because AUDIENCE 88 is a national study, station personnel will want to use care in applying its results to their 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 the 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 almost 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 reach 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 households 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.

Programming and Audience

Programmers understand better than most that the relationship between programming and listeners is quite direct. Every programming decision has an effect on who is attracted and how well they are served. But even the best programmers are often unsure as to *how* programming and listeners are linked.

In the same way that VALS hones our understanding of who listens and why, other new knowledge and concepts presented in this report establish firm links between programming and listeners.

AUDIENCE 88 is certainly not the last word on these relationships; but by the same token, there is little in these pages that has been seen before.

AUDIENCE 88 arms programmers with new ways of thinking about programming and audiences, and provides a new vocabulary that expresses these thoughts. Its key tenets are so fundamental that they can be immediately and directly applied by virtually all programmers, in virtually all situations, with a very high degree of confidence.

But individual circumstances vary, and the way each programmer will apply AUDIENCE 88's new concepts and knowledge will vary, too. For this

reason, this report does not formulate solutions for success; a prescription for doubling audience is nowhere to be found in these pages.

But knowledge, concepts, and vocabulary that will further this goal *are* found here. AUDIENCE 88 provides tools to be mastered, not laws to be obeyed; tools to be *applied*, not just theory to be studied. Programmers decide if, when, where, and how to apply these tools given their own circumstances and audience service strategies.

AUDIENCE 88 informs programming decision making by linking outcomes to actions. If a programmer wants to take a specific action, AUDIENCE 88 suggests the most likely results to anticipate. Conversely, if a programmer wants to achieve a specific result, AUDIENCE 88 suggests the actions that are most likely to yield that outcome.

In short, what a programmer gets out of this study will be proportional to what he or she puts into it. And, as the sidebar on page 6 suggests, his or her job will probably be *more* difficult as a result. The days of research used as a reason not to do something are ending. With the increased certainty brought by new research comes an increased responsibility to act — or an increased likelihood of suffering adverse consequences.

TAKING RESPONSIBILITY

Research yields information, and information is power. The more and better research we do, the more we learn about radio listeners and the better we can serve them. In this sense research has made public broadcasters' lives easier.

But power demands responsibility. As audience research gets more detailed and its results more certain, public broadcasters face some of the most difficult decisions yet. Ignorance isn't the problem; indeed, it's our research-based understanding of what probably *will* happen that makes these decisions so difficult.

Today every station has access to audience research — if not for its own listeners, then for listeners to stations in similar situations. National studies such as AUDIENCE 88 augment these data. No public station is so different that it has nothing to learn from the experiences of its colleagues.

The body of common knowledge is so substantial, in fact, that many areas of audience knowledge have clearly reached comfortable confidence levels. After more than a decade of experience, public radio has enough experience with data to *predict the consequences* of various programming decisions.

But to take advantage of this resource, we must change our mentality. We must grow out of the *research as report card* mindset into the *research as road map* mindset. Rather than limiting research to its evaluative function, we can use it to predict the consequences of our decisions. Rather than relying on old solutions to old problems, we can

generate new solutions to current problems, based on expectations of what the audience consequences will probably be.

As new information is amassed and more appropriate concepts are generated, *programmers will be called upon to reexamine old solutions and to forge new ones. Increased knowledge forces all public broadcasters to take responsibility for their actions — and their inactions.*

One of the challenges posed by research is to apply its results to initiate new enterprises. Anticipation of consequences should be a reason to act positively — to be bold, to take risks, to act — rather than to hold the status quo.

It's easy to become reactionary instead of reactive. It takes much more understanding, sophistication, imagination, and confidence to apply audience data to create new and exciting possibilities.

Audience research has made public broadcasters smarter than ever before. Our responsibility is to take what we've learned from our significant research investment and apply it creatively to serve more listeners and to serve them better.

If programming is to create listeners for public radio, public radio must create programming for listeners. We must build on an understanding of the most recent and most sophisticated research. We must be creative, willing to manage risks, and able to absorb short-term losses as we invest in increased audience service — and our own future.

Excerpted from "Taking Responsibility," an essay by the author that first appeared in the March 30, 1988 issue of *CURRENT*.

2.

UTILIGRAPHIC SEGMENTATION

Strategies designed to enhance public radio's service to listeners will be most effective when based on an understanding of who listeners are and how they use public radio. Utiligraphic segmentation defines four groups of listeners by how they use public radio; because each group uses public radio quite differently, certain audience-building tactics will affect only portions of the audience. While defined by their utiligraphics, individuals in these segments tend to share demographic and VALS characteristics; this information can fine-tune tactics designed to change listener behaviors and attitudes. Finally, each segment has a distinct propensity to support — or not to support — public radio; this finding emphasizes programming's role in the relationship between public radio's service to listeners and listeners' service to public radio.

Talk about “listeners” usually begins with the *cume* — the cumulative total of all people who listen over the course of a specified period, usually a week. At last count, public radio's weekly cume was estimated at 11.7 million listeners each week — 5.6 percent of all Americans over the age of 12.

But no talk of “listeners” gets very far without mention of their “listening,” which is measured in quarter-hour increments. In an “average quarter-hour” between 6 a.m. and midnight, over 700,000 listeners are tuned to public radio — typically less than two percent of all radio listening being done.

All this points to an “average listener” spending 7 hours and 45 minutes with public radio each week. But averages can be misleading. The fact is, the ways listeners listen to public radio are as distinct as the listeners themselves; some persons use their public station hours each day, while others use it just a few minutes each month.

This creates an imbalance common to virtually all services, products, and activities where barriers to consumption or participation are low to nonexistent: *heavy consumers account for most of the product consumed, even though they represent the minority of consumers.*

For instance, while most Americans drink carbonated beverages on occasion, a few heavy drinkers

consume most of the product. The same imbalance holds true for tea and television, rice and radio.

Persons who listen heavily to public radio count far more in the average quarter-hour audience than persons who use it very little — even though every individual counts equally in the cume.

Utiligraphic segmentation allows us to understand this imbalance — to peek behind the averages — by examining how individuals differ in their public radio use.

Heavy and Light Listeners

For this analysis, persons who listen to their public radio station six hours or more are dubbed “heavy” listeners. Others are called “light” listeners.

Heavy listeners represent about 40 percent of public radio's weekly *listeners*, but they account for more than 80 percent of all *listening* done during a week. Light listeners — the other 60 percent of the weekly cume — account for only 20 percent of all listening.

Time spent listening (TSL) is the key. Heavy listeners average 16 hours of public radio use per week; light listeners average two and one-half hours.

HEAVY AND LIGHT LISTENERS

Public radio's weekly cume of 11.7 million persons is too large a number for any human being to grasp from experience. The following exercise attempts to put it in perspective, and along the way gives a context to heavy/light utiligraphic segmentation.

Imagine assembling public radio's weekly cume audience along Interstate 80. Along the entire road — from San Francisco to Hackensack, then joining I-95 across the George Washington Bridge into New York and Manhattan — listeners would be spaced about 18 inches apart. Also imagine that listeners are positioned along the highway according to how much time they spend using public radio each week: the lightest listeners are closest to the Pacific, the heaviest listeners are closest to the Atlantic.

With all persons arranged by their time spent listening to public radio, you begin in San Francisco and start driving east, stopping every so often to ask people in the line how long they listen to public radio. You cross the Bay Bridge: one quarter-hour; head up the east bay into Vallejo: one quarter-hour; do 75 through Fairfield and Dixon: one quarter-hour; in fact, you're almost to Sacramento before you meet the first person who listens *more* than one quarter-hour to public radio.

Passing Sacramento's two-quarter-hour listeners you wind through the foothills, thread the Donner Pass, and head into Reno. Listeners are now reporting three quarter-hours of use, and you stop for the night. The next morning you set out along the long stretch to Winnemucca. Cresting the Golconda Summit you meet the first person in the audience who listens for more than one hour.

A few hundred miles later you roll into Salt Lake City. You're one-fifth of the way to New York. Since you left San Francisco, you've driven about 600 miles and passed more than two million public

radio listeners — every one of whom listens to public radio 90 minutes or less each week.

The listeners you have passed make up 20 percent of the weekly cume audience. Because their time spent listening to public radio is so low (between one and six quarter-hours per week) they account for *less than three percent of all listening* to public radio. In other words, the remaining 80 percent of listeners between Salt Lake City and New York account for over 97 percent of all public radio use.

In the 600-mile stretch between Salt Lake City and Cheyenne stand another 20 percent of the weekly cume. These persons listen to public radio between 7 and 13 quarter-hours per week. Another 20 percent of the cume stand between Cheyenne and Des Moines; all listen less than six hours per week.

To the east of Des Moines lie (by now) the "heavy" 40 percent of the audience. "Heavy" is a relative term. AUDIENCE 88 defines "heavy" listeners as those who listen more than six hours per week. It could just as easily define them as the listeners standing east of Toledo; they account for 20 percent of all listeners — 56 percent of all listening.

A listener every 18 inches coast to coast — 5.6 percent of the U.S. population — constitutes a lot of people using public radio each week. But even more — 6.2 percent of the U.S. population — use it less frequently than once per week but at least once per year. A very long raft stretching from San Francisco to Honolulu would allow 18 inches of sitting space for each of these "peripheral" listeners.

A corresponding exercise of similarly spaced non-listeners (Americans only) yields a line of humanity circling the globe twice at the equator. This scenario should put things into a better perspective.

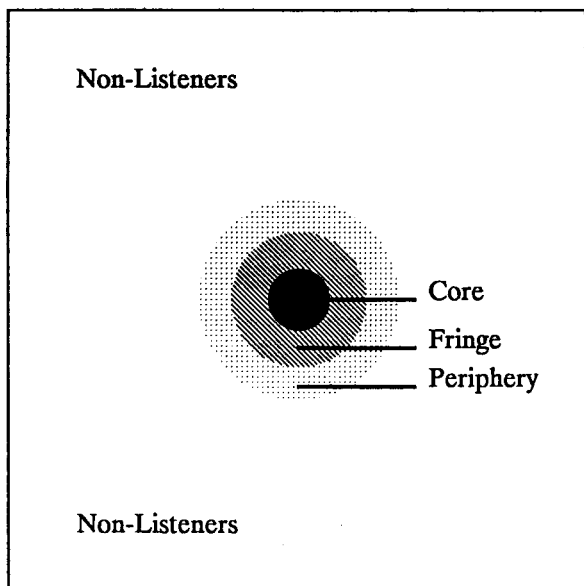
Core and Fringe Listeners

Time spent listening to public radio is a useful segmentation scheme as far as it goes, but it fails to acknowledge whether a listener prefers a public station to other radio alternatives.

A listener's use of public radio compared to use of other stations is an excellent indicator of that person's *preferences*. In utiligraphic terms, the station that a person listens to the most this week (that is, more than any other single station) is defined as that person's "favorite."

AUDIENCE 88 defines "core" listeners as persons in this week's cume for whom a public radio station is their favorite. Core listeners are those to whom public radio *appeals* most. (Appeal is discussed in Section 3.) They are the nucleus of public radio's audience.

Remaining listeners fall outside the nucleus of appeal. Those in this week's cume comprise the "fringe"; those who have yet to enter the cume — but who will do so within one year — comprise the "periphery."



Over two-thirds of the listeners using public radio at any time are in its core audience; a typical quarter-hour draws 71 percent of its listeners from public radio's core. Over the course of a week

fringe listeners come to outnumber core listeners two to one. Yet even though fringe listeners account for almost two-thirds of all weekly cume *listeners*, they account for only one-third of all *listening*.

Again, as with heavy and light listeners, time spent listening is the source of this imbalance. Core listeners average almost 15 hours of public radio use each week, while persons in the fringe average fewer than four hours.

And here again, averages are misleading. Just because the "average" core listener uses more public radio than the "average" fringe listener does not mean that a core listener must listen more.

Core and fringe membership is independent of how much a person uses public radio. For instance, a person who listens only to public radio can listen for just a few minutes and still be counted among its core audience. On the other extreme, a person may be a heavy public radio listener and still listen more to a favorite commercial station.

The matrix of core and fringe, heavy and light listening is the crux of AUDIENCE 88's utiligraphic segmentation analysis. All public radio listeners in the weekly cume are classified into one of four audience segments — heavy core, light core, heavy fringe, and light fringe.

	Heavy Core	Light Core	Heavy Fringe	Light Fringe
Percent of <i>Listening</i>	66.2	4.4	14.6	14.8
Percent of <i>Listeners</i>				
After One Day	45.5	9.3	14.7	30.5
After One Week	27.9	9.3	11.7	51.1
After One Month	19.9	8.1	8.8	63.2
After One Year	13.6	7.1	6.6	72.7

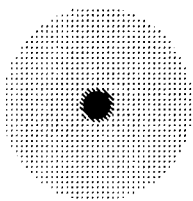
A public station is the station of choice for heavy core and light core listeners. The difference is that those in the heavy core listen to it six hours or more during a typical week. Light fringe and heavy fringe listeners prefer at least one other commercial station. The difference is that light fringe listeners listen fewer than six hours to public radio in a typical week.

CORE AND FRINGE LISTENERS

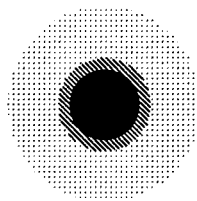
Measurement of radio use begins with the people listening now. But this group of people changes with time. The constant flow of people in and out of the current audience creates the cume — the set of people who listen at some time or another over a given period of time.

The circles below demonstrate how listeners enter the cume over time. The large shaded area shows the universe of people who will listen to public radio for at least five minutes during the course of a year. This outer circle represents public radio's *latent* cume — those who *will* listen but haven't yet.

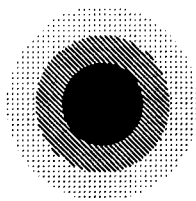
HOW CORE AND FRINGE LISTENERS ENTER PUBLIC RADIO'S CUME



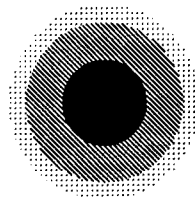
Cume after
one quarter-hour



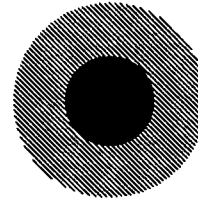
Cume after
one day



Cume after
one week



Cume after
one month



Cume after
one year

As people tune in to public radio they join the cume. People who join as core listeners are depicted as the solid circle. Around the core are people who enter the cume as fringe listeners.

(In subsequent weeks, a core listener may become a fringe listener or vice versa, but AUDIENCE 88 assigns utiligraphic status based on a listener's *typical* week of listening.)

People in the core are those most attracted to public radio. Since they are the most likely to be in the audience at any given time, they are the first to enter the cume: 71 percent of all persons entering the cume during the first quarter-hour of measurement are core listeners, because 71 percent of the persons listening *at any given time* (that is, in the average quarter-hour) are core listeners.

Indeed, of all the persons who enter the cume as core listeners over the course of a year, 60 percent do so within one day and 85 percent do so within one week. Compare this to the 37 percent of all fringe listeners who enter the first week.

Latent listeners remain in the periphery until they use public radio. Those still in the periphery after one week tune in much less frequently and listen relatively little compared with those who enter the cume the first week. These peripheral listeners are those to whom public radio appeals less strongly.

So, even though persons in the core account for most of the *listening* at any given time, persons in the fringe account for most of the *listeners* after the first day.

Fluidity

AUDIENCE 88 assigns listeners to utiligraphic segments based on one week's worth of listening, which it assumes is typical. But radio is not a fixed environment, and listeners are not static constituents. Programming on commercial and public stations changes; listening opportunities change, as do people's preferences, moods, and needs.

Clearly, listeners who make up the four utiligraphic groups — heavy core, light core, heavy fringe, and light fringe — can flow in and out among groups. Last week's light core listener may be this week's heavy core listener, who may be next week's heavy fringe listener, and so on.

Membership in utiligraphic segments is *fluid*. But it is not so fluid as to render the utiligraphic scheme useless. In fact, the force of *appeal* (Section 3) assures relative stability. Two out of three people listening to public radio at any moment are core listeners. Public radio strongly appeals to them; they prefer it to all other stations. As long as programming's appeal remains relatively constant, those in the core will tend to stay in the core. The same logic holds for those in the fringe.

Figuring out just how many individuals migrate from one utiligraphic segment to another over the course of time is not necessary. The purpose of audience segmentation is to identify *groups of listeners* (segments) composed of similar types of listeners within segments, but different from one another. Differences are measured not only by *who people are*, but by *how they behave*.

AUDIENCE 88 finds that its four utiligraphic segments are composed of *significantly different mixtures of listeners*, each of which *behaves differently*. This tendency is strong enough to drown out whatever noise emanates from the flow of listeners among segments.

The Widening Circle

Just as people can flow in and out of utiligraphic segments, they also flow in and out of public radio's weekly cume audience. When AUDIENCE 88 went back to its sample of public radio listeners nearly a year after first measuring their listening,

12 percent said they had not listened to their public station in the past 30 days. Even among public radio's heavy core listeners, 5 percent had — at least temporarily — dropped out of the audience.

Yet public radio's weekly audience did not shrink as a result; other listeners flowed in from its "peripheral" audience to maintain its size.

Peripheral audience is the name AUDIENCE 88 gives to the people who will enter public radio's cume over the course of a year, but who have not done so yet. A good way to think about peripheral audience and about cume in general is shown on the opposite page.

Let's say we had sufficient foresight to predict who will listen to public radio, *as currently programmed*, within the next year. AUDIENCE 88 defines this group as public radio's *latent* audience, and estimates its number at roughly 12 percent of the U.S. population. Some people in the latent audience will tune in sooner than others, but all will listen eventually. (Note that *latent* audience is not the same as *potential* audience; the distinction will be made clear in Sections 3 and 5.)

Let's also assume that we knew exactly when each of these listeners next tuned to public radio — that is, we know when people enter the cume. Before we begin counting, we note that all listeners are latent: none has yet entered the cume; all are in the periphery.

Now we begin monitoring listeners. The pictures on the opposite page show inner circles expanding to encompass the people who leave the periphery and enter the cume. Clearly, the *cumulative number of listeners is inseparable from the length of time we look for them*. The longer we count listeners, the more listeners we will count.

The number of listeners entering the cume starts at a very rapid pace, but it soon slows considerably. One-quarter of the latent audience joins the cume in the first day; one-half in the first week. It takes the next 51 weeks for the other half to join. People who join the cume early on are different from people who join the cume much later. They listen more often; they depend on public radio more; they are people with different demographics, values, and lifestyles.

THE UTILIGRAPHICS OF UTILIGRAPHIC SEGMENTS

Table 21. How Utiligraphic Segments Use Public Radio.

	Heavy Core	Light Core	Heavy Fringe	Light Fringe
TSL (HR:MN)	18:30	3:38	9:43	2:15
Occasions	11.1	4.8	6.6	2.5
Duration (HR:MN)	1:40	:45	1:28	:54
Loyalty (%)	68.6	60.7	26.0	12.3
Percent Using				
Two or More NPR Member Stations	22.8	16.5	17.0	7.9
Percent Listening				
Every Day	30.1	2.3	8.2	.4
Weekdays Only	20.6	48.2	31.1	54.7
Weekends Only	1.5	11.9	8.4	25.0
Both	77.9	39.9	60.6	20.3
At-Home Only	32.9	37.9	44.0	50.3
Away Only	11.5	32.9	15.4	33.7
Both Locations	55.7	29.2	40.6	16.0

Table 22. How Utiligraphic Segments Use Radio.

	Heavy Core	Light Core	Heavy Fringe	Light Fringe
TSL (HR:MN)	28:04	7:05	41:03	24:29
Occasions	19.9	9.8	24.5	19.6
Duration (HR:MN)	1:24	:43	1:40	1:15
Number of Stations	3.5	3.3	4.4	4.8
Percent Listening				
Every Day	58.8	20.3	69.5	55.4
Weekdays Only	9.2	26.2	4.0	7.2
Weekends Only	.0	3.8	.0	.2
Both	90.8	70.0	96.0	92.6
At-Home Only	16.6	20.3	11.2	12.9
Away Only	4.2	17.5	2.5	5.0
Both Locations	79.2	62.2	86.2	82.0
AM Only	2.0	2.9	2.4	3.9
FM Only	49.9	51.6	36.7	30.9
Both Bands	48.1	45.5	60.8	65.2

Table 21, left, displays how public radio's utiligraphic segments use public radio; Table 22, lower left, shows similar information for all radio use by public radio's listeners. Table 23, below, compares each segment's use of its primary public radio station to its use of all other stations. Other stations are primarily commercial, but also include non-commercial stations with which the listener did not spend as much time as the primary public station.

Table 23. How Utiligraphic Segments Use Public Radio in Comparison with Other Stations. Over two-thirds (68.6%) of all radio use by heavy core listeners is to their favorite public station. The remaining 31.4 percent is divided by the other 2.5 stations used by this segment to yield an average of 12.6 percent loyalty to each other station.

	Public Radio Listening	All Other Listening	Total Radio Listening
HEAVY CORE			
TSL (HR:MN)	18:30	9:34	28:04
Occasions	11.1	8.8	19.9
Duration (HR:MN)	1:40	1:05	1:24
Loyalty (%)	68.6	31.4	(12.6)*
LIGHT CORE			
TSL (HR:MN)	3:38	3:27	7:05
Occasions	4.8	5.0	9.8
Duration (HR:MN)	:45	:41	:43
Loyalty (%)	60.7	39.3	(17.1)
HEAVY FRINGE			
TSL (HR:MN)	9:43	31:20	41:03
Occasions	6.6	17.9	24.5
Duration (HR:MN)	1:28	1:45	1:40
Loyalty (%)	26.0	74.0	(21.8)
LIGHT FRINGE			
TSL (HR:MN)	2:15	22:14	24:29
Occasions	2.5	17.1	19.6
Duration (HR:MN)	:54	1:18	1:15
Loyalty (%)	12.3	87.7	(23.1)

* Numbers in parentheses show loyalty to the "average other" radio station.

Utiligraphics

The first people to join the circle are those to whom public radio appeals the most; they are the most connected and the most loyal to public radio; they are its core audience.

Initially core listeners account for most of the cumulative audience. But within a couple of days, the majority of listeners entering the expanding circle find public radio somewhat less appealing; they prefer other stations to public radio; they don't listen very often or very much.

In fact, the longer it takes for a person to join the audience from the periphery, the more likely that person is to enter the circle as a light fringe listener. Nine out of ten people who enter the circle after the first week will enter as light fringe listeners — that is, they will use public radio less than six hours that week and listen to some other station more.

Public radio has a weaker and weaker appeal for persons who have not yet listened after longer and longer periods of time.

We can understand the appeal of public radio's programming through the traits of the people most attracted to it. This is one of the most important implications of AUDIENCE 88's utiligraphic analysis.

Who are these people? Why do some listen so much, others so little, and so many not at all? To get at the answer, we must look more closely at the listeners themselves.

Demographics and VALS

People who listen to public radio are different from people who don't listen to public radio. AUDIENCE 88 affirms several demographic characteristics of public radio listeners that have been reported in prior studies.

Education tops the list; the farther people pursue an education, the more likely they are to pursue public radio. A good education allows more options for better and higher-paying jobs, and so public radio's listeners tend to have better jobs and higher incomes than non-listeners.

But while demographics can *describe who* listeners are, they do not really *explain why* these people listen. To get at this issue, AUDIENCE 88 asked listeners a series of questions exploring how they feel about themselves and others, what they consider socially acceptable and not, and what they personally value and believe. This inquiry employs a system developed by the Stanford Research Institute called VALS (Values and Lifestyles) to classify listeners into personality types. (Refer to the AUDIENCE 88 *Terms & Concepts* handbook for a detailed description of the VALS system.)

One particular personality type — Inner-Directed, Societally Conscious — emerges as a very powerful predictor of public radio use. Societally Conscious people are concerned about society as a whole, have a strong sense of social responsibility, and act on their beliefs. They're interested in arts and culture, enjoy reading, and watch relatively little television. They make up only 12 percent of the U.S. population, yet they account for 42 percent of public radio's weekly audience.

This knowledge puts a new perspective on the familiar demographic composition of the audience. It is now clear that education, income, and all the other things many associate with public radio's "upscale" listeners are just reflections of an underlying personality trait that drives people to become better educated and that drives them toward more challenging jobs. All indications are that the Societally Conscious concept comes very close to describing this underlying personality trait. It's what makes our listeners most different.

This underlying personality trait is also what differentiates core listeners — the people to whom public radio appeals the most — from light fringe listeners.

In utiligraphic terms, core listeners are the most "public-radio-like" of all listeners; they are the most likely to be Societally Conscious. Moving away from the core, we find that fringe listeners are less likely to be Societally Conscious; people who remain in the periphery for long periods of time are even less so — but they are still more likely to be Societally Conscious than non-listeners. Non-listeners are very unlike public radio's listeners in this sense.

THE DEMOGRAPHICS AND VALS OF UTILIGRAPHIC SEGMENTS

Table 24. The Demographics of Utiligraphic Segments.

	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
Graduated College	24.6	20.6	22.9	24.5
Graduate 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

Table 25. The VALS of Utiligraphic Segments.

	Percent of Each Utiligraphic Segment:			
	Heavy Core	Light Core	Heavy Fringe	Light Fringe
Need-Driven	2.2	1.9	3.1	2.1
Survivor	1.7	1.0	1.9	1.3
Sustainer	.5	.9	1.2	.8
Outer-Directed	34.5	35.1	44.5	49.8
Belonger	11.2	10.9	13.1	18.9
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

Table 24 displays selected demographics; Table 25 shows VALS information; Table 26 suggests the effects of greater competition in major markets on utiligraphic segments. Not a demographic table per se, Table 27 rounds out the personalities of the segments by showing their levels of support.

Table 26. The Effects of Market Size on Utiligraphic Segments. Persons in the top 10 markets are more likely than listeners in other markets to listen to public radio less than six hours per week, and more likely to use a commercial station more. This is due to the availability of more stations and higher levels of competition in the largest markets.

	Percent of Listeners to Stations in These Markets			
	Heavy Core	Light Core	Heavy Fringe	Light Fringe
Top 4 Markets	21.0	6.7	11.5	60.8
Markets 5-10	23.0	4.5	14.1	58.4
Markets 11-30	29.3	10.3	11.0	49.5
Markets 31+	31.0	11.1	11.6	46.3

Table 27. Utiligraphic Segments and Public Radio Support. Heavy use and loyalty combine to predict public radio support with some certainty.

	Percent of Each Utiligraphic Segment:			
	Heavy Core	Light Core	Heavy Fringe	Light Fringe
Current Member	51.3	32.2	37.5	20.3
Lapsed Member	16.3	16.6	19.3	15.4
Never a Member	28.7	46.2	37.5	56.0
Don't Know/Remember	3.6	5.0	5.8	8.3
Percent of Listeners in Each Membership Category:				
	Heavy Core	Light Core	Heavy Fringe	Light Fringe
Current Member	44.5	9.3	13.7	32.5
Lapsed Member	28.1	9.5	13.9	48.5
Never a Member	17.6	9.4	9.7	63.3

It's as if public radio were a magnet. It attracts certain types of people very strongly; on others it exerts only a weak or sporadic pull; most people it leaves unmoved. A few are even repulsed by it. This is inevitable; it's the way radio works.

This magnetic attraction is called *appeal*, and it's the basis for understanding and controlling the relationship between programming and the audience it attracts and serves.

Exploiting the Differences

Differences are not only the key to *understanding* public radio's listeners; they provide the means by which public broadcasters can better *serve* these listeners; they hold the keys to audience building.

Differences among various types of listeners indicate what behaviors we can hope to change through on-air and off-air activities. Because certain audience segments share specific traits, they are much more likely than other segments to respond to specific strategies. In short, *understanding the significant differences among listeners helps define and refine your options.*

For instance, assume that you've fine-tuned your station's programming, and you want to encourage as many listeners as possible to try it as soon as possible. As the diagram on page 10 illustrates, most of your core listeners — because of their frequency of listening — will either hear an on-air spot for the changes or tune across them within a few days. So will a great number of your fringe listeners; within a week one-half of your annual audience will know about the changes.

But the other half will not. It will take a year of normal listening and continuous on-air promotion for listeners still in the periphery to find out about the changes. You will have to reach these listeners off-air if you want to reach them in a shorter period of time.

AUDIENCE 88's *Advertising and Promotion* report addresses how a station's off-air activities might accelerate the frequency with which peripheral listeners tune in. Similarly, programmers can affect

listening behaviors through on-air activities. For instance, assume that you wish to increase the time spent listening to your station. What audience segment can you effectively address, and how?

Core listeners already spend two-thirds of their radio listening time tuned to public radio; it seems as if there is little you could do to get them to tune in more often or for longer periods.

However, many stations' program schedules have spots where persons in the core audience are being discouraged from listening by programming that does not appeal to them. Sophisticated mechanical diary analysis can identify this programming. It can tell you when your listeners' loyalty dips — that is, when they are listening to radio, but not listening to your station. (See the example on page 20.)

If you are surprised by this result, then you may decide to fix the programming so that your core audience will listen, thus raising your TSL.

But what if you aren't surprised? The programming has such a different appeal that you never expected your regular listeners to use it. Then the question is this: are the people whom you intended to serve actually being served? The same custom diary analysis can tell you if in fact the programming is doing what you intended. Are fringe listeners being served in great enough numbers to outweigh the disruption to your core? Is there a net increase or decrease in listening? This directly affects your station's TSL.

What you are more likely to find is that fringe listeners are most attracted to programming that embodies your station's central appeal — in most cases NPR news magazines and *A Prairie Home Companion* (discussed in Section 3). When these are on, fringe listeners come in to the station; when they are not, fringe listeners tend to leave.

If you think that the problem is that fringe listeners just do not know about your other fine programming, this is the time to tell them. By their tuning in more often, your station's TSL will increase. Or, if the programming just does not appeal to them, you have a whole set of alternate options. Section 5 addresses these in detail.

A CLOSER LOOK AT THE UTILIGRAPHIC SEGMENTS

Heavy Core

Persons in the heavy core prefer a public station to all others, and use it at least six hours per week. One in four (28%) weekly cume listeners is a heavy core listener; yet the segment accounts for two-thirds (66%) of all listening to public radio.

Heavy core listeners tune in to public radio an average of 11 times (occasions) per week; their average duration is 1 hour and 40 minutes per occasion, yielding 18 hours and 30 minutes of listening per week. Regularity is the key to such heavy use: one-third (30%) of all heavy core listeners tune in to public radio every day; two-thirds (65%) have been listening for five or more years.

Some persons in the heavy core listen *only* to public radio, but most use other stations, too. Heavy core listeners average nine occasions and 10 hours of listening to other — primarily commercial — stations. However, one in four (23%) heavy core listeners uses at least two public stations per week.

Half (53%) of these listeners are between 25 and 44 years old. Even by public radio's standards this group is very well educated and professionally successful. Over two-thirds (71%) have completed college or attended graduate school, half (48%) are employed in professional or technical occupations, and one-third (32%) live in households earning more than \$50,000 annually.

Heavy core listeners are even more likely than other public radio listeners to be Inner-Directed. Half (52%) are Societally Conscious; 11 percent are younger/less mature Experimentals or I-Am-Me's. Achievers, while accounting for one-fifth (21%) of this group's listeners, are less in evidence than in any other utiligraphic segment.

Heavy use, preference of public radio, inner-direction, and high incomes — these factors combine to make persons in the heavy core audience the most likely to support public radio. Half (51%) of all heavy core listeners live in households currently supporting public radio. Heavy core listeners account for nearly half (45%) of all members.

In short, while accounting for only one-quarter of public radio's weekly cume, heavy core listeners account for nearly half of its current members and two-thirds of its average quarter-hour audience.

Light Core

Public radio is also the favorite station of persons in the light core segment. Unlike their heavy core counterparts, they listen to public radio *fewer* than 6 hours per week — 3 hours and 30 minutes on the average, compared with the heavy core's 18 hours and 30 minutes.

And unlike heavy core listeners, who average 11 occasions of 100 minutes in length, light core listeners average 5 occasions of 45 minutes.

The light core segment is much smaller than the heavy core — it accounts for only nine percent of public radio's weekly listeners and four percent of all listening. But its listeners are almost as loyal: for every hour they spend with their public station, they spend 40 minutes with other stations.

Light core listeners have virtually everything in common with heavy core listeners, with one major difference: heavy core listeners spend four times longer with radio each week — 28 hours versus light core's 7 hours. Because they use more radio, heavy core listeners use more public radio — about five times more.

Because their time investment is less than that of the heavy core, light core listeners are much less likely to consider public radio *personally important*; for this reason they are less likely to support it financially. One in three (32%) persons in the light core lives in a household currently supporting public radio, compared with one in two (51%) persons in the heavy core. (Use and personal importance are key to support, as discussed in detail in Section 4.)

Twenty-four percent of all persons in the light core report that they are listening less to their public station than they were one year ago. Perhaps they used to be in the heavy (or at least, not-so-light) core; but with the kids, the new job, larger lawns to mow, or other changes in their upscale lives, they just can't listen as much. When they can steal the time, public radio remains their station of choice — still the one they listen to when they can only listen to one.

Light Fringe

Listeners for whom a public station is not the favorite, and who use public radio fewer than 6 hours per week, are light fringe listeners. Light fringe listeners are utiligraphic opposites of heavy core listeners. They average over 24 hours of radio listening each week, yet only 2 hours and 15 minutes are spent with public radio. While 23 percent of all persons in the heavy core use at least one other public station, only 8 percent of all light fringe listeners tune in another, even though they use four other stations each week.

Only 12 percent of the time light fringe listeners spend with radio is spent with public radio. One-half (51%) listen to their public station only one day in seven. Because of their light use, light fringe listeners account for only 15 percent of all public radio listening. However, *they account for half (51%) of public radio's weekly cume.*

Compare the impact of the light fringe and heavy core segments on your station's audience estimates. For every two light fringe listeners in your weekly audience there is only one heavy core listener. But for every two light fringe listeners in your average audience, there are nine heavy core listeners.

Like most public radio listeners, most persons in the light fringe are between 25 and 54 years old; yet they are the utiligraphic segment most likely to be younger than 24 or older than 65. While most have college educations, they are the utiligraphic segment least likely to have attended college. Only one-third (33%) are Societally Conscious; this is high in comparison to the U.S. population, but low compared to over half of the core segments. One in four (28%) is an Outer-Directed Achiever; one in five (21%) is Need-Driven.

Light listening and preference of another station combine to make light core listeners least likely to support public radio. Only 20 percent live in currently supporting households. Nearly half (49%) of all identified lapsed members and two-thirds (63%) of all listeners who have never been a member are in the light fringe segment.

In short, while accounting for over half (51%) of public radio's weekly audience, light core listeners comprise only one-third (33%) of its current members and one seventh (15%) of its average audience.

Heavy Fringe

The remaining utiligraphic segment, heavy fringe, is a hybrid of heavy listeners for whom public radio is not their favorite station. As such, these persons share demographic and VALS traits with light fringe listeners; yet they use public radio more.

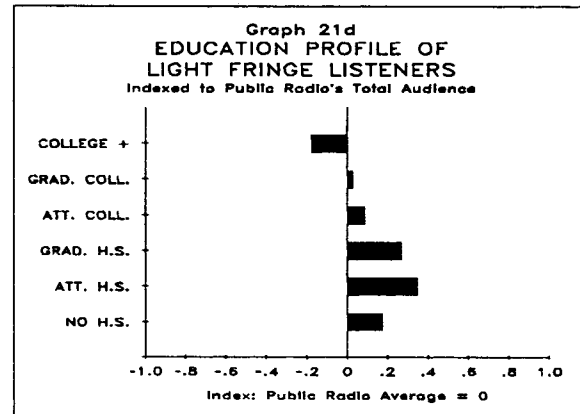
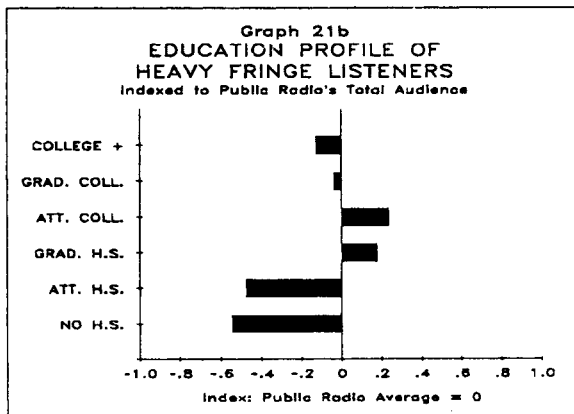
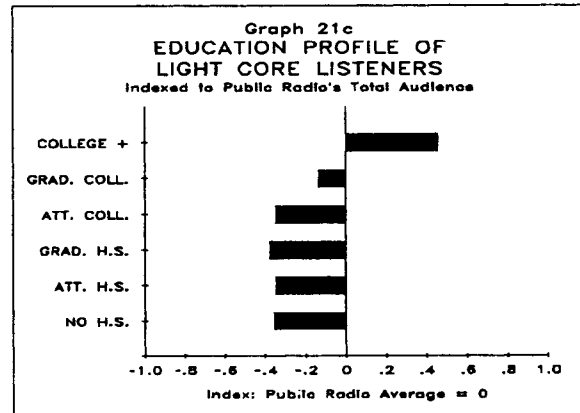
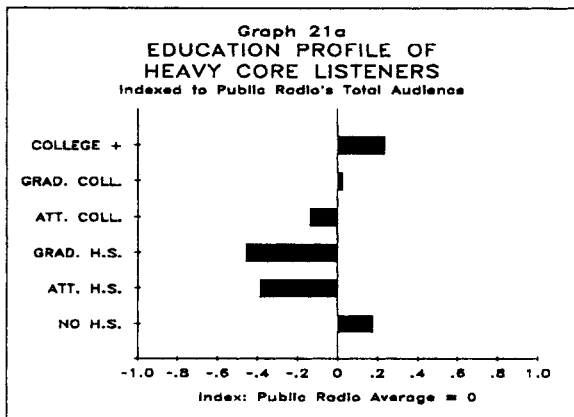
The most striking characteristic of the heavy fringe segment is its very heavy use of radio. Listeners in this segment average 41 hours of radio use each week — 24.5 occasions averaging 100 minutes apiece. On the average only one in four heavy fringe radio listening hours is spent with public radio.

Heavy fringe listeners are a little more likely than light core listeners to live in households currently supporting public radio — 38 percent compared to 32 percent, respectively. This indicates that the *amount* of time a person uses public radio is a stronger contributing factor to membership than the person's preference of public radio. (Section 4 discusses the interrelationship between listeners' use of public radio and their support.)

EDUCATION PROFILES OF THE UTILIGRAPHIC SEGMENTS

The graphs below illustrate how listeners' formal education is associated with their use of public radio. Core listeners are the most likely to have pursued their education beyond a college degree; light fringe listeners are the utiligraphic group least likely to have graduated college.

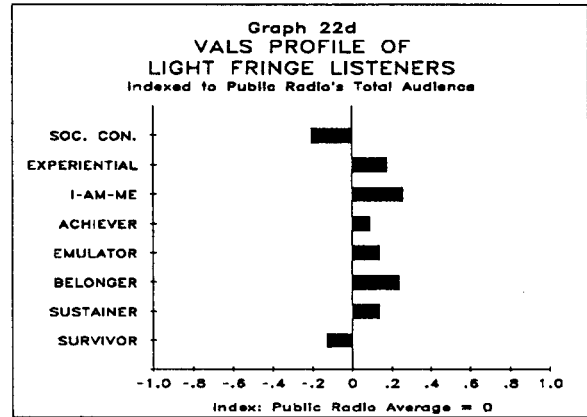
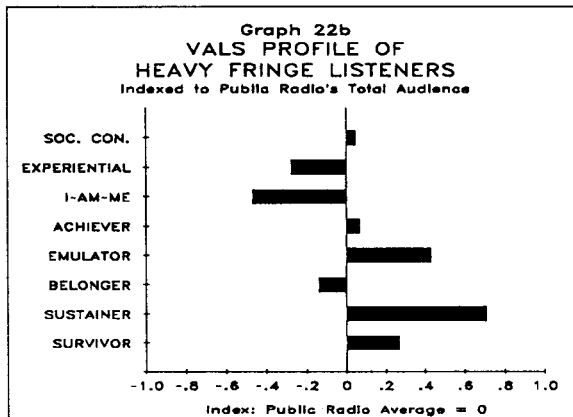
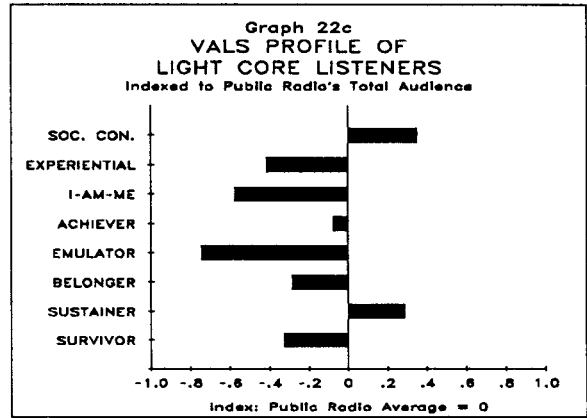
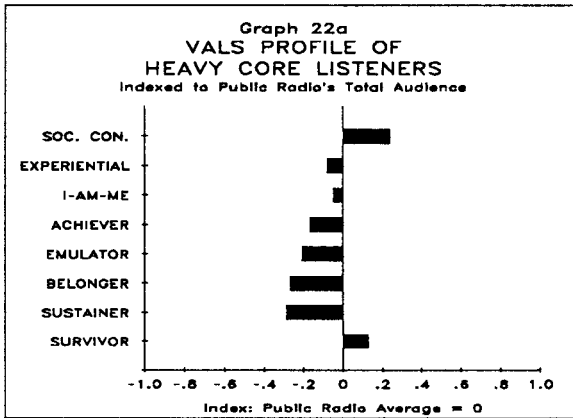
In order to highlight the differences between the utiligraphic segments, these graphs compare each segment to public radio's total audience. Public radio listeners in *all* segments are much better educated than non-listeners.



VALS PROFILES OF THE UTILIGRAPHIC SEGMENTS

The graphs below illustrate how listeners' use of public radio is associated with their VALS classification. Core listeners are the most likely to be Societally Conscious.

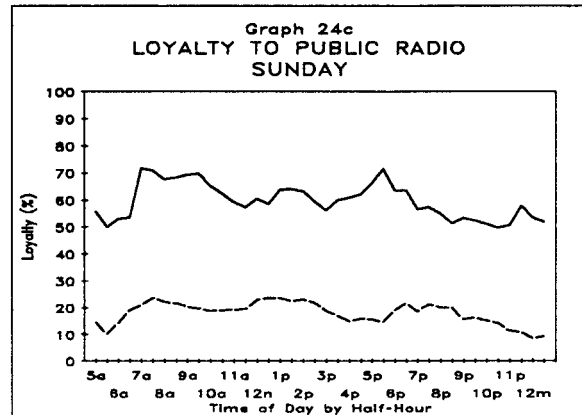
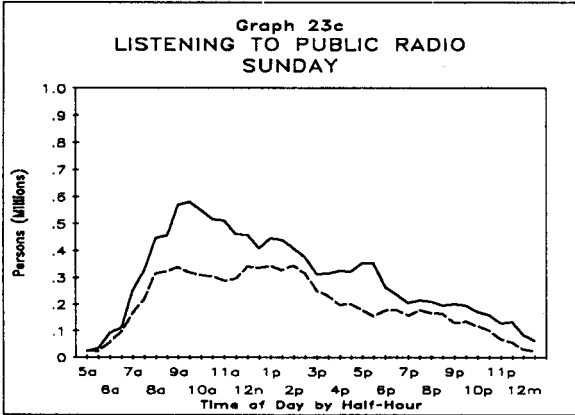
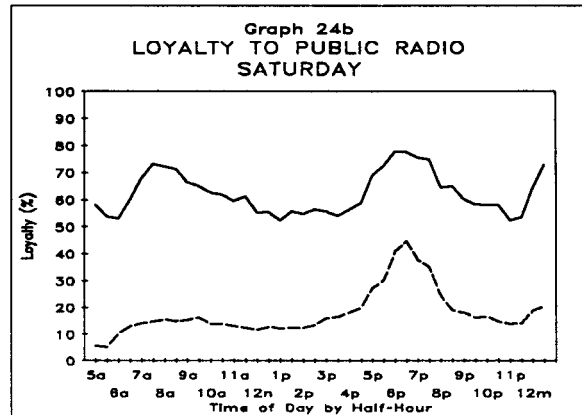
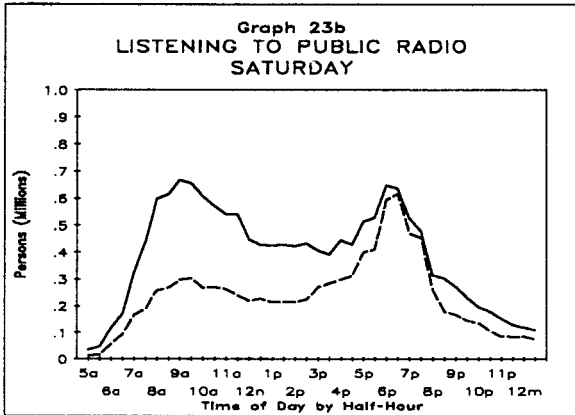
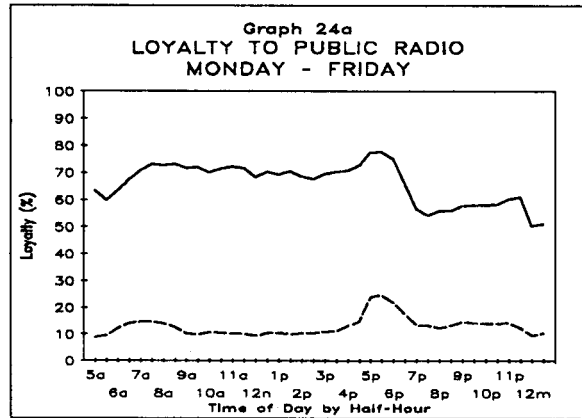
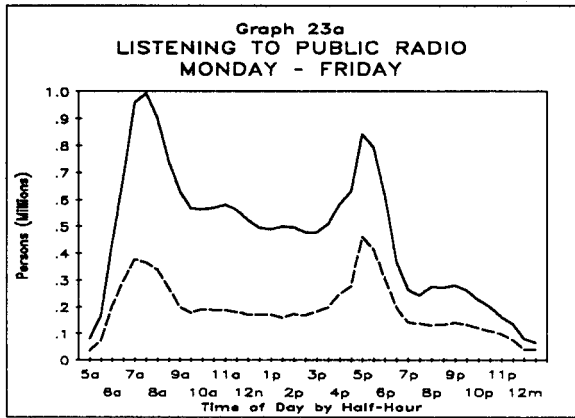
These graphs compare each segment to public radio's total audience in order to highlight the differences between the utiligraphic segments. Public radio listeners in *all* segments are much more likely than non-listeners to be Inner-Directed (Societally Conscious, Experiential, and I-Am-Me).



WHEN CORE AND FRINGE LISTEN

Graphs on the left show when core and fringe audiences listen to public radio. Graphs on the right display the loyalty of each segment — public radio

use expressed as a percent of its total radio use. Solid lines depict core audience; dashed lines depict fringe. From 1987 data, courtesy of NPR.



3.

APPEAL

Because public radio's programming is significantly different from commercial programming, its listeners are significantly different from persons who listen only to commercial formats. And because public radio airs programming with a variety of appeals, its audience changes in subtle but significant ways according to the appeal of the programming being broadcast. This section examines how appeal can be described by the composition of the audience it attracts; it explores the affinities of appeal among program types; and it discusses the programming-related implications of this knowledge.

Appeal Attracts and Shapes Audiences

Every minute of radio programming, whether on a commercial or public station, holds a certain type of attraction for a certain type of person. This attraction — the force bringing listeners to it — is called *appeal*. People listen to programming on a radio station because it *appeals* to them.

To “appeal” means to provide a service that attracts certain segments of listeners more than others; as a noun, “appeal” is the attribute of the service, often intangible, that attracts these listeners.

Public radio's audience is much better educated than the population as a whole. This means that public radio *appeals* to an educated segment of the U.S. population. What is the attribute of public radio's programming that attracts these listeners? Perhaps the appeal that distinguishes public from other radio programming may be loosely defined as “intelligence.”

Perhaps mixed into this is the concern about society and social responsibility felt by the Societally Conscious individual; or some aspect of competence, self-reliance, and efficiency valued by the Achiever.

Appeal describes why some people listen and why others do not; it also describes who those people are. “*Appeal*” is not synonymous with “popularity.” Instead, it describes the attraction of a program or program service to a particular audience segment.

Program appeal is what “shapes” the composition of an audience. Programming that draws high concentrations (not necessarily high numbers) of a “type” of person from the radio-listening public appeals to that type of person.

While audience characteristics define programming's appeal, programming is what defines the audience. Public radio's listeners are intelligent because public radio's programming is intelligent; its listeners are Societally Conscious because its programming is Societally Conscious. To understand appeal is to understand that likes attract and opposites repel.

This concept of appeal is critical to understanding how public radio fits into the larger and highly competitive radio broadcast medium, and how it can improve its programming to better serve listeners. In fact, appeal is the basis for understanding how radio serves listeners.

Affinity

Programming that appeals to one type of person may not appeal to another; in the extreme, it may be repulsive to another. Consider the most familiar formats. The type of person who listens to the easy or beautiful station is typically repulsed — quite literally — by the music, jocks, and spots of the heavy rock station. He or she finds the station's entire sound and attitude repugnant.

AUDIENCE SEGMENTATION AND APPEAL

Dividing an audience into groups of listeners based on some characteristic common to persons within groups but not shared with persons in other groups is called “audience segmentation.” Since different programming attracts different types of listeners, audience segmentation is the key to unlocking *programming appeal*. Appeal must be thoroughly and accurately understood to craft a program schedule that serves listeners as well as it can. These are the basic tenets:

1. Individuals share characteristics, or attributes, that describe *segments* of the audience.

Every individual possesses a unique combination of characteristics. But people share characteristics that can be used to classify them into groups, or *segments*. Gender is a characteristic that classifies people into two segments; age can classify people into children, teens, or various adult segments.

Segments can be broad or narrow. Gender’s two segments are broad; combining several attributes (men between the ages of 35-44 who have graduated college, who are Societally Conscious, and who drive cabs) can yield very small and narrow segments.

Because the people in any audience segment are different from people in other segments, different segments can behave differently. For instance, 12-year-old girls and 25-year-old men and 90-year-old women think, do, and need quite different things. This is important to broadcasters for this reason:

2. Different audience segments are attracted by different programming *appeals*.

Webster defines “appeal” as “the power of arousing a sympathetic response.” In radio this sympathetic response is called “listening.” “Appeal” as a verb means to provide a service that attracts certain segments of listeners more than others; as a noun,

“appeal” is the attribute attracting these listeners.

Fishing is a good analogy. Some fish are attracted by worms, others by sardines; some chase only live lures, while others chase anything shiny. Similarly, radio formats have certain appeals. Women in their teens flock to contemporary hits; men 18- to 34-years-old swim to the beat of a heavier rock; most listeners to urban formats are black; nostalgia formats attract the oldest radio listeners.

Good programmers, like good fishermen, know what appeals to the fish they are trying to catch.

3. The highly competitive radio environment compels programmers to appeal to specific audience segments — and *not* to appeal to others.

No single station can please all the people all the time. No station can serve all the people even some of the time. Each of the 20 to 70 radio stations available to most Americans appeals to a different audience segment. Unless it competes with only one or two other stations (and sometimes even then), a station targeting a program to each discrete audience segment serves few if any listeners. Its appeal is too scattered and inconsistent; people will prefer listening to other, more *appealing*, stations.

4. While the diversity of appeals *across* stations increases listener service, the diversity of appeals *within* a station decreases listener service as measured by TSL and personal importance.

By consistently programming to meet the values and lifestyles and the entertainment and information needs of a specific type of person, a station becomes more appealing and important to the people in that audience segment. Other listeners will tune elsewhere for programming that meets their needs. That’s how radio works.

A well-educated woman of 60 may be repulsed by the contemporary hits enjoyed by a well-educated woman of 20; a blue-collar employee may have an aversion to the music enjoyed by his white-collar supervisor, and *vice versa*.

Of course, it is not that clear cut; most people have more than one format in their radio listening repertoire. They may use a rock, hit, or country station for their up-tempo moods; an adult, classical, or new age station for background in quieter times; and a news/talk or NPR station for larger blocks of news and information.

Certain format combinations are more likely to be used than others. For instance, urban and classical formats share little audience, as do nostalgia and rock. On the other extreme, stations airing NPR news share a great deal of audience with new age stations. This sharing has everything to do with the *appeals* of the formats.

Formats that serve very similar audiences with highly congruent appeals are said to have *affinity*. People who listen to NPR news have a strong affinity for new age and adult contemporary formats, a weaker affinity for a wide range of others, and an aversion to urban, country, and other formats.

Public Radio Is Not a Format

Persons who listen to public radio are different from persons who do not. Put simply, public radio listeners tend to be much better educated. Programming — more precisely, the appeal inherent in programming — is the reason for this difference.

But there are differences of appeal *among* public radio's program offerings. For instance, certain program streams serve younger listeners, while other streams serve much older listeners. Both audiences are well-educated, but *they are not the same groups of listeners*.

AUDIENCE 88 assesses the different appeals of, and the relative levels of affinity among, public radio's major types of programming. By understanding these appeals and affinities, programmers

may intelligently implement various changes in their program schedules to better serve listeners.

Public Radio's Appeals

AUDIENCE 88 finds that the types of programming dominating public radio stations' schedules do not share as much affinity as many people assume.

If a public station offered a consistent appeal, in the same way that a classic rock or a classic country station does, its programming would appeal to the same type of listener every minute of every hour of every day. Listeners would tune in and out as their lifestyles allowed. Once they have tuned in, programming would not change appeal and cause them to tune away. It would be constantly accessible to its consistent audience.

Instead, public radio's appeal changes significantly. Genre, source, host — indeed, the station's whole "attitude" toward itself and its listeners — can and do change quickly and dramatically.

The result is that stations are not seen as reliable (that is, always listenable) by any single audience segment, and thereby perpetually underserve their potential audiences. AUDIENCE 88 identifies this as one of public radio's major programming problems — and opportunities.

This finding should not be interpreted to mean that the only way to attain consistent appeal is by converting to a singular format, such as all-news or all-music. Far from it.

AUDIENCE 88 demonstrates that apparently different formats from truly diverse sources can share a very strong affinity. Genre may change from information to music, or source may change from local to Minnesota; but if the *appeal* of the programming remains constant (that is, if the type of listener attracted to the programming does not change) listeners will flourish on the diversity.

The sidebar on the next page discusses the ability to maintain diversity within a consistently appealing program schedule.

PROGRAM DIVERSITY AND CONSISTENT APPEAL

During the last few years public broadcasters have come to understand “seams” as changes in format; a shift in programming from one format to another creates a seam that encourages listeners to tune out. A trend in “seamless” programming has resulted as programmers attempt to maximize audience service. But what has been forgotten is that *it’s the change in appeal, not the change in format, that causes the tune-out.*

A station can shift from one format to another and still retain its audience — as long as the two formats have congruent appeals. Listeners are lost by shifting appeal — not format.

Imagine a radio station juxtaposing Run D.M.C., Hank Williams, Philip Glass, Glen Miller, and Madonna: all musicians, but each with a profoundly differing appeal attracting profoundly different audiences.

Now imagine a radio station following *Weekend Edition* with an operatic presentation. This shift in appeal is no less profound.

Consistency of appeal does *not* require consistency of genre; nor need it result in bland homogeneity. When carefully crafted, a diversity of programming styles, genres, and sources can serve a sizable and appreciative audience segment, but only when all elements maintain a highly consistent appeal.

AUDIENCE 88 provides the information needed to assess the different appeals of, and the relative levels of affinity among, public radio’s major types of programming. By understanding these appeals and affinities, programmers can better serve

listeners through various changes — some minor, some major — in their program schedules.

For example, news and information programming is the backbone of many stations’ schedules; it typically serves two-thirds of all weekly listeners. Yet very often the music programming on public stations does not maintain these listeners. It’s not as if news listeners were turning off their radios or listening to news on another station; most turn to music on commercial stations middays.

In appeal terms, *public radio news programming shares a greater affinity* with some commercial music formats than with public radio’s own music. Devising music programming that appeals to this significant audience segment would minimize the “difference” between public radio’s news and music; these two diverse formats *would be serving the very same listeners — and serving them better than they are being served now.*

When all programming elements share affinity, people listen more; they are not forced to tune out when hit by programming that does not appeal to them. And when a station beams a coherent appeal, it becomes more dependable; more people listen.

The foundation of programming strategy is the shaping of program appeal into a sound, a viewpoint, an “attitude” that reflects a station’s mission and that speaks to listeners with a compelling and coherent voice. By consistently appealing to the values and lifestyles, the information and entertainment needs of a specific type of person, a station becomes more appealing and more important to the people in that audience segment.

Affinity Scores

In the same way that the composition of a station's audience is determined by the appeal of its programming, *the appeal of a program or format is reflected in the composition of its audience.*

Table 31 displays the average quarter-hour composition of various formats and programs broadcast on public radio. Three segmentation schemes are used to describe the listeners: age (in combination with gender), education, and VALS. Investigation has determined that of all the segmentation schemes employed in the AUDIENCE 88 study, these three best describe and explain the differing appeals among public radio's various programs and formats.

Table 33 displays the *affinity scores* for this matrix of formats and programs. Affinity scores indicate the relative congruence of appeal between a pair of formats or programs, as measured by the audience composition of the two.

It is important to understand that different segmentation schemes yield different affinity scores. For instance, most sets of formats and programs have very high affinity scores in the education dimension. This simply means that most formats and programs broadcast on public radio attract well-educated listeners.

But not all well-educated listeners are the same. Some are older while others are younger; some are Inner-Directed while others are Outer-Directed. The affinity scores based on age/gender and VALS compositions manifest these often subtle but always critical differences in appeal.

Compare children's programming to information programming, for instance. Both audiences are well educated. But listeners to children's programming are more highly concentrated in the 35- to 44- and 55- to 64-year-old segments; they are also more likely to be Outer-Directed than information listeners.

Similarly, both opera and classical music attract well-educated listeners. Yet nearly half of the average audience for classical music is between 25 and 44 years old, while only one-quarter of opera's audience is in this segment; half is over 55 years of age.

Operative Affinity Score

When assessing the relative affinities of formats and programs, the lowest affinity score takes precedence over all others. As the previous examples demonstrate, audiences for formats and programs may share particular characteristics (such as high levels of education) and still not be the same set of listeners. In the case where older people are attracted to one format and younger people are attracted to another, the age/gender affinity score will be very low or even negative. The lowest affinity score is the *operative* affinity score; it best indicates the *true* congruence — or incongruence — of appeal between two formats or programs.

Table 33 highlights the operative affinity score for each pair of formats or programs. This information culminates in Table 34, which summarizes the affinities among the matrix of formats and programs by depicting the operative score as a symbol, ranging from strong affinity to no affinity to aversion.

Table 34 indicates, for example, that drama programming shares at best weak affinity with other public radio formats; programming intended for children and other specific targets has, at best, no affinity with other formats; opera programming has virtually no affinity with classical music, and is aversive to the audiences for all other formats and programs.

Ramifications and Strategies

One thing is critical to understanding and applying these affinity scores: they are based on the programs and formats *as currently produced*; affinities will change if the appeal of any single program or format is changed. Programmers desiring to increase the affinity of NPR news and classical music, for instance, may take steps to "youthen" the appeal of their stations' classical music programming. Similarly, if a programmer so desires, classical music might be taken "older" to better match the appeal of opera programming.

Programmers can use Table 34 as a general guide to what programs and formats "work" together as is and which do not. Thinking through the ramifications of this knowledge will help programmers devise strategies for improving audience service.

Table 31. Composition of Program Services. Percent of each service’s AQH audience in each VALS, education, or age segment. Programming designed to serve demographically-defined audience segments — Hispanics, blacks, and the elderly for instance — is folded into the “Target” service. Based on 1986 programming.

	Total	ATC	Classical	Drama	Info	Jazz	Kids	ME	Opera	PHC	Target
Need-Driven	2.4	1.7	1.2	.0	1.7	2.9	.0	.7	1.4	1.3	3.6
Survivor	1.9	1.5	.9	.0	1.4	2.2	.0	.6	.7	.9	3.6
Sustainer	.5	.2	.3	.0	.3	.7	.0	.1	.7	.4	.0
Outer-Directed	40.3	35.1	40.1	37.6	38.8	43.4	43.0	36.7	50.8	37.7	45.4
Belonger	13.8	10.1	13.7	10.5	12.6	13.3	11.4	9.9	20.3	11.4	16.6
Emulator	3.0	2.5	2.5	7.3	2.8	3.4	2.5	2.2	2.5	2.4	3.8
Achiever	23.5	22.5	23.9	19.8	23.4	26.7	29.1	24.6	28.0	23.9	25.0
Inner-Directed	57.5	63.2	58.6	62.5	59.6	53.6	57.0	62.5	47.9	61.0	51.0
I Am Me	3.3	3.1	2.3	5.8	3.1	3.6	2.5	2.2	3.3	3.0	7.4
Experiential	7.6	7.4	6.5	8.3	7.6	8.5	12.7	8.5	5.6	6.9	6.1
Societally Conscious	46.6	52.7	49.8	48.4	48.9	41.5	41.8	51.8	39.0	51.1	37.5
Did not Graduate H.S.	2.8	1.9	1.2	5.5	2.0	4.1	1.9	1.1	1.9	1.3	4.5
Graduated High School	9.4	6.8	8.5	6.2	8.4	8.5	11.0	6.4	12.3	6.7	8.7
1-3 Years of College	22.4	19.7	20.4	26.9	22.1	24.2	20.7	21.3	20.7	20.9	23.3
Graduated College	24.7	26.4	25.3	26.7	25.0	25.6	26.8	25.4	26.0	27.3	25.7
Graduate School	40.6	45.2	44.5	35.8	42.5	37.7	40.2	45.7	39.1	44.1	37.9
18-24 Years Old	5.3	5.7	3.6	5.3	5.2	7.0	2.5	4.6	4.8	3.3	7.3
25-34 Years Old	24.6	25.5	21.5	25.0	24.6	25.5	15.2	27.8	8.8	25.4	19.5
35-44 Years Old	24.7	25.6	25.2	25.7	25.7	23.1	36.7	27.9	14.2	25.6	22.8
45-54 Years Old	15.1	15.8	16.2	16.6	15.3	16.2	16.4	14.0	21.0	16.6	19.8
55-64 Years Old	14.0	13.0	14.0	17.4	13.1	14.4	17.7	12.3	19.8	10.7	9.5
65 Years Old or Older	16.4	14.4	19.5	9.9	16.1	13.8	11.4	13.3	31.4	18.4	21.2

Table 32. Program Service Audiences Indexed to Total Public Radio Audience. The likelihood of a service’s AQH audience being in a particular VALS, education, or age segment in comparison to all public radio listeners.

	ATC	Classical	Drama	Info	Jazz	Kids	ME	Opera	PHC	Target
Need-Driven	-.29	-.50	-1.00	-.29	.21	-1.00	-.71	-.42	-.46	.50
Survivor	-.22	-.52	-1.00	-.28	.15	-1.00	-.66	-.65	-.55	.88
Sustainer	-.68	-.37	-1.00	-.46	.45	-1.00	-.72	.35	-.20	-1.00
Outer-Directed	-.13	-.00	-.07	-.04	.08	.07	-.09	.26	-.06	.13
Belonger	-.27	-.00	-.24	-.08	-.03	-.17	-.28	.47	-.17	.20
Emulator	-.14	-.17	1.45	-.05	.15	-.15	-.27	-.17	-.18	.29
Achiever	-.04	.02	-.16	-.00	.14	.24	.05	.19	.02	.07
Inner-Directed	.10	.02	.09	.04	-.07	-.01	.09	-.17	.06	-.11
I Am Me	-.06	-.29	.77	-.05	.11	-.22	-.34	.01	-.09	1.27
Experiential	-.02	-.14	.09	.00	.12	.67	.13	-.26	-.09	-.19
Societally Conscious	.13	.07	.04	.05	-.11	-.10	.11	-.16	.10	-.19
Did not Graduate H.S.	-.32	-.57	.96	-.29	.46	-.32	-.61	-.32	-.54	.61
Graduated High School	-.27	-.10	-.35	-.10	-.10	.16	-.32	.31	-.29	-.08
1-3 Years of College	-.12	-.09	.20	-.01	.08	-.08	-.05	-.08	-.07	.04
Graduated College	.07	.03	.08	.01	.04	.09	.03	.05	.11	.04
Graduate School	.11	.10	-.12	.04	-.07	-.01	.12	-.04	.08	-.07
18-24 Years Old	.07	-.32	.00	-.02	.31	-.53	-.13	-.10	-.39	.37
25-34 Years Old	.04	-.13	.02	.00	.04	-.38	.13	-.64	.04	-.21
35-44 Years Old	.04	.02	.04	.04	-.06	.49	.13	-.42	.04	-.08
45-54 Years Old	.05	.07	.10	.02	.07	.09	-.07	.39	.10	.31
55-64 Years Old	-.07	.00	.24	-.07	.03	.27	-.12	.42	-.24	-.32
65 Years Old or Older	-.12	.19	-.40	-.02	-.16	-.30	-.19	.92	.12	.29

Table 33. Affinity Scores for Formats and Programs. The affinity score is interpreted as two programs' or formats' similarity of audience composition, or appeal, in a particular segmentation scheme. Age/gender, education, and VALS are used here. Scores above .500 indicate affinity; scores between .000 and .499 indicate no affinity; and negative scores indicate negative affinity, or aversion.

All Things Considered and opera, for instance, have highly congruent educational appeals — both attract well-educated persons, reflected in a high affinity score of .985. But over half of *All Things Considered's* AQH audience is between 25 and 44 years of age, while over half of opera's average audience is over 55 years of age. This fact is reflected in the age/gender affinity score of -.359. In short, while opera and *All Things Considered* both attract well-educated listeners, *they are not the same listeners*; opera's audience is significantly older.

The lowest affinity score (*) indicates the operative congruence of appeal; in other words, the lowest score is the best indicator of how similar the audiences for the two services are. The negative age/gender affinity score indicates that *All Things Considered's* listeners are likely to actively avoid public radio's opera programming, in the same way that opera listeners are unlikely to listen to *All Things Considered*.

	ATC	Classical	Drama	Info	Jazz	Kids	ME	Opera	PHC	Target
All Things Considered										
Age/Gender		.887*			.869*	.541	.979	-.359*	.924	.272*
Education		.999	.694		.982	.990	.999	.985	.999	.985
VALS		.919	.668*		.918	.373*	.974*	.723	.917*	.641
Classical										
Age/Gender	.887*		.538*	.906*	.698*	.597	.863*	.016*	.928*	.085*
Education	.999		.958	.998	.985	.993	.999	.991	.998	.986
VALS	.919		.632	.948	.851	.482*	.901	.846	.938	.438
Drama										
Age/Gender	.694	.538*		.706	.846	.185*	.662*	-.251*	.503*	.170*
Education	.957	.958		.971	.992	.964	.964	.958	.969	.985
VALS	.668*	.632		.664*	.661*	.185*	.675	.407	.571	.307
Information										
Age/Gender		.906*	.706		.878*	.524		-.293*	.923*	.274*
Education		.998	.971		.993	.994		.991	.997	.993
VALS		.948	.664*		.929	.428*		.779	.934	.631
Jazz										
Age/Gender	.869*	.698*	.846	.878*		.326*	.864*	-.277*	.717*	.266*
Education	.982	.985	.992	.993		.988	.986	.985	.989	.996
VALS	.918	.851	.661*	.929		.427	.923	.660	.872	.713
Kids										
Age/Gender	.541	.597	.185*	.524	.326*		.560	-.099*	.588	.193
Education	.990	.993	.964	.994	.988		.988	.999	.993	.991
VALS	.373*	.482*	.185*	.428*	.427		.375*	.472	.381*	.156*
Morning Edition										
Age/Gender	.979	.863*	.662*		.864*	.560		-.360*	.897*	.310*
Education	.999	.999	.964		.986	.988		.984	.998	.987
VALS	.974*	.901	.675		.923	.375*		.683	.906	.679
Opera										
Age/Gender	-.359*	.016*	-.251*	-.293*	-.277*	-.099*	-.360*		-.211*	-.385*
Education	.985	.991	.958	.991	.985	.999	.984		.988	.987
VALS	.723	.846	.407	.779	.660	.472	.683		.738	.332
Prairie Home Companion										
Age/Gender	.924	.928*	.503*	.923*	.717*	.588	.897*	-.211*		.227*
Education	.999	.998	.969	.997	.989	.993	.998	.988		.991
VALS	.917*	.938	.571	.934	.872	.381*	.906	.738		.564
Targeted Programming										
Age/Gender	.272*	.085*	.170*	.274*	.266*	.193	.310*	-.385*	.227*	
Education	.985	.986	.985	.993	.996	.991	.987	.987	.991	
VALS	.641	.438	.307	.631	.713	.156*	.679	.332	.564	

Strategies begin with simple programming adjacencies. Formats or programs that do not have high affinities will create “appeal seams”; scheduling these formats or programs adjacently will cause significant audience turnover.

Cross-promotion strategies are similarly informed. Promoting from one format to another with high affinity should prove much more effective than promoting to a format with low affinity.

These data suggest which sets of program types work in combination, and which sets do not. A programmer desiring to hone a station’s appeal can use the data to include or exclude programming types. Inclusion strategies include judging the suitability of new programming options based on their appeal (how well do they serve the station’s core audience?), and creating new programming, or refining existing programming, based on its affinity

with programming already on the station. Exclusion strategies include replacing programming with low or aversive affinity with programming that will better serve the station’s core audience.

Perhaps one of the greatest opportunities faced by programmers is to define their stations’ service in *appeal-driven* terms instead of *genre-driven* terms. Rather than broadcasting an eclectic schedule for diverse audiences, as is the norm on many public stations, programmers might consider designing a schedule of appeal-driven eclecticism for the range of a particular audience’s tastes.

Section 5 explores appeal-driven options in much greater detail. The intended result of appeal-driven programming is to better serve a singular audience. The following examination of the importance of public radio to its listeners demonstrates why a programmer might adopt appeal-driven strategies.

Table 34. Affinities Among Formats and Programs. This table symbolically displays the degree to which a pair of formats or programs is compatible. The faces give a quick estimation of their affinity, as indicated by Table 33’s lowest affinity score for the pair.

	<u>ATC</u>	<u>Classical</u>	<u>Drama</u>	<u>Info</u>	<u>Jazz</u>	<u>Kids</u>	<u>ME</u>	<u>Opera</u>	<u>PHC</u>	<u>Target</u>
All Things Considered		😊	😊		😊	😞	😊	😞	😊	😞
Classical	😊		😊	😊	😊	😞	😊	😞	😊	😞
Drama	😊	😊		😊	😊	😞	😊	😞	😊	😞
Information		😊	😊		😊	😞	😞	😊	😊	😞
Jazz	😊	😊	😊	😊		😞	😊	😞	😊	😞
Kids	😞	😞	😞	😞	😞		😞	😞	😞	😞
Morning Edition	😊	😊	😊		😊	😞		😞	😊	😞
Opera	😞	😞	😞	😞	😞	😞	😞		😞	😞
Prairie Home Companion	😊	😊	😊	😊	😊	😞	😊	😞		😞
Targeted Programming	😞	😞	😞	😞	😞	😞	😞	😞	😊	

KEY:	😊	Strong Affinity	Operative affinity score greater than .910.
	😊	Moderate Affinity	Operative affinity score between .850 and .910.
	😊	Weak Affinity	Operative affinity score between .500 and .849.
	😞	No Affinity	Operative affinity score between .000 and .499.
	😞	Aversion	Operative affinity score below .000.

4.

IMPORTANCE

Do listeners support public radio because through use they have come to consider it important in their own lives, or do they support it because they consider it important to others, an asset to the community, and a cause worth supporting? AUDIENCE 88 confirms that while an altruistic sense of service to others may be a key argument for underwriters, listeners support public radio because they listen to it and consider it important in their own lives.

Two complementary theories attempt to explain why people support public radio. 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 support. In this section, AUDIENCE 88 examines how well each theory actually explains public radio support, and explores how programming is related to each perception.

Programmers will find these examinations of consequence for two reasons. First is the fulfillment of mission. If making a difference in peoples’ lives is part of a station’s mission, personal importance is certainly a measure of how well mission is being accomplished. Similarly, if being considered a

meaningful community service is part of a station’s mission, altruistic importance is certainly a measure of how well mission is being accomplished.

Second, if personal and altruistic importance really are linked to support, then programming tactics that encourage people to use and perceive a station in certain ways can encourage them to become supporters. In fact, as AUDIENCE 88 finds in its *Membership* report, strategies that influence persons’ use of public radio and their perceptions about it affect their propensity to become members more than any other controllable factor.

The relative strengths of the altruistic and personal importance models suggest different programming strategies to maximize a station’s fulfillment of mission, its service to listeners, and the levels at which its audience supports it.

Table 41. The Personal Importance of Public Radio. Listeners reacted to the statement, “*The programming on this [public radio] station is an important part of my life. I would miss it if it were to go away.*” One-third (36.6%) of the cume accounting for over half (50.5%) of all listening “strongly agree” with this statement.

	Percent of Cume	Percent of AQH
Strongly Agree	36.6	50.5
Mostly/Somewhat Agree	45.8	35.6
Disagree	17.6	13.9

Table 42. The Altruistic Importance of Public Radio. Listeners were asked to react to the statement, “*This [public radio] station is important to many people. It is an asset to the community.*” Nearly half (46.3%) of the cume accounting for over half (56.9%) of all listening “strongly agree” with this statement.

	Percent of Cume	Percent of AQH
Strongly Agree	46.3	56.9
Mostly/Somewhat Agree	44.0	33.6
Disagree	9.8	9.6

TIME SPENT LISTENING

Since listeners have complete freedom to pick and choose among radio stations, their time spent listening to your station is the single statistic that best indicates how well you are serving your weekly cume audience.

Time spent listening (TSL) is defined as the total amount of time people spend listening in a week. It is a function of the number of times they tune in *and* the amount of time they spend listening each time. Tune-ins are called *occasions*, and the time spent listening per occasion is called *duration*. Mathematically,

$$\text{TSL} = \text{occasions} \times \text{duration}.$$

If, for example, somebody spends 2 hours listening to a station in a week, and tunes in on 4 different occasions, that person's average duration is 30 minutes per tune-in.

Respondents in the AUDIENCE 88 sample average five and one-half occasions per week for about 84 minutes' duration apiece. Their average TSL is about 7 hours and 45 minutes per week.

As the equation above shows, increasing either the number of times a person tunes in (occasions) or the average length of time spent listening per tune-in (duration) will increase total time spent listening.

An occasion begins when a person turns on the radio, or when a person changes from one station to another. Most tune-ins are from "off," not from another station. In other words, *most occasions begin when the radio is turned on.*

If your station consistently delivers programming with a similarly shaped appeal, listeners will become

more confident with each tune-in that it will have what they are seeking. Yours will be the station of choice for more occasions.

How long a person stays tuned is more often a function of external factors than of programming. People generally turn off their radios because they move on to other things; it's hard to increase duration when a person turns off the radio, gets out of the car, and walks into an office building for a meeting.

Yet duration can be *prematurely shortened* by abrupt transitions, jarring public service announcements, stumbling announcers: these and many more problems encourage listeners to tune to another station or to turn the radio off.

The best way to drive a listener away — to cut short the duration of the occasion — is to abruptly change the shape of your programming's appeal. A person listening to information programming in English is suddenly hit with someone talking in some other language. Tune out. A listener enthralled by Mozart just a minute ago is assaulted by something arrhythmic, atonal, and non-melodic. Click.

Strategies that give listeners more of what they seek from public radio require that programmers pay attention to the shape of every minute's appeal. Such strategies increase the number of occasions listeners give to your station and decrease the number of times programming prematurely shortens their duration. By maintaining the shape of appeal, you program for the greatest common denominator; you treat listeners with intelligence, respect, and care; your station becomes a more highly valued service. It becomes more important to more people.

Personal Importance

People listen to a public radio station because it *appeals* to them: it shares their values, treats them as they want to be treated, gives them what they appreciate hearing — all the qualities discussed in Section 3.

The *personal importance* theory states that people consider public radio important in their lives *because they use it*. In fact, the more they use it, the more likely they are to consider it important in their lives.

The relationship between use and personal importance is cemented by appeal. The more a station appeals to a person, the more he or she will use it and use it to the exclusion of other stations. The more a person uses a station, the more entwined it becomes into his or her daily routine. The more a station is entwined into a daily routine, the more a person considers it personally important.

People who consider public radio personally important are much more likely to support it than people who do not consider it so. They pay for it because they use it, just as they pay for a magazine subscription, a ticket to a movie, or a ride at Disneyland. They use it because it appeals to them.

This model was introduced and supported in the “Cheap-90” study (1985); subsequent refinements are presented in *The Personal Importance of Public Radio* (1988). AUDIENCE 88 reaffirms the significance of this use-driven model of support.

Personal Importance, Use, and Appeal

Over one-third of all public radio listeners agree strongly with the statement, “The programming on this [public radio] station is an important part of my life. I would miss it if it were to go away.” Another half of the audience agrees, but not as strongly. This leaves one-sixth of the audience disagreeing with the statement. (See Table 41.)

The belief that the station is personally important is highly associated with *use* of the station. As Graph 41 (on page 32) shows, listeners who strongly agree with the personal importance statement use their station an average of eleven and one-half

hours per week, compared with other listeners who average between six and seven hours per week.

Time spent listening is a combination of *occasions* — the number of times listeners tune in the station, and *duration* — the amount of time they spend listening once tuned in. Is this difference in TSL caused by some persons tuning in more often, or is it caused by their listening longer once tuned in?

Graphs 42 and 43 clearly show that *occasions* are driving the TSL difference. Listeners strongly agreeing with the personal importance statement tune in an average of eight times per week, while other listeners average five occasions.

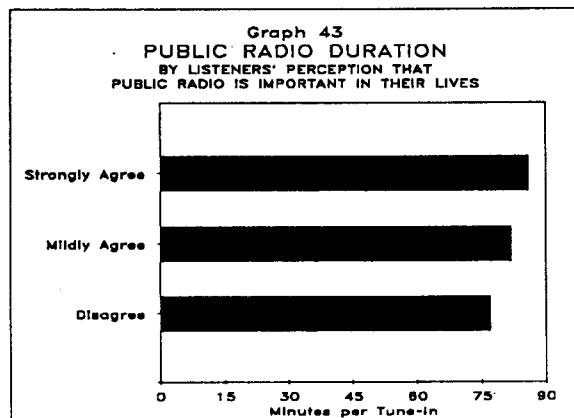
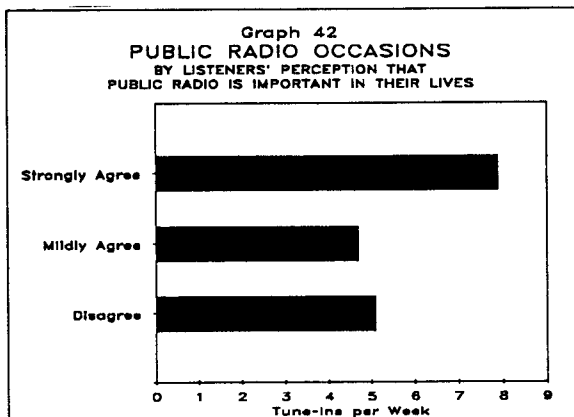
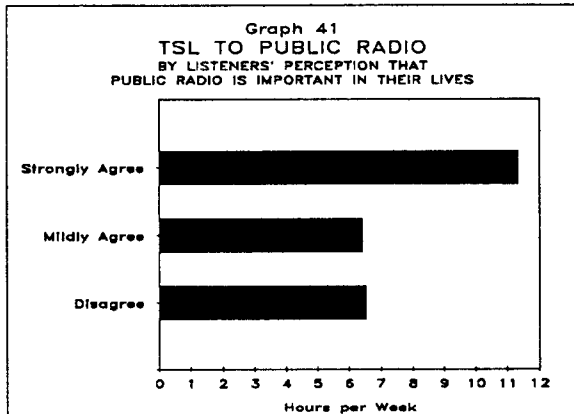
The perception of personal important is also highly associated with *loyalty*. Listeners who strongly agree with the personal importance statement give their public radio station an average of 45 percent of their radio listening time. Compare this to listeners who disagree with this statement, who average only 31 percent.

Table 43. How Personal Importance is Related to Public Radio Use. Listeners who strongly agree that public radio is important in their lives, who would miss it were it to go away, use their public radio stations an average of five hours longer than other listeners. These listeners’ higher TSL is driven by their tuning in the station an average of three more times per week than others.

Not only are they heavier users, these listeners are also more loyal to their public radio stations, and began listening a couple years sooner.

Over half (54.6%) of all heavy core listeners consider public radio personally important, compared with only one-quarter (25.5%) of all light fringe listeners.

	Strongly Agree	Mildly Agree	Disagree
TSL (HR:MN)	11:21	6:26	6:33
Occasions	7.9	4.7	5.1
Duration (HR:MN)	1:26	1:22	1:17
Loyalty (%)	45.2	30.1	31.0
Years Spent Listening	8.8	7.1	7.1
Percent of Those in the			
Heavy Core	54.6	32.0	13.4
Light Core	30.1	50.7	19.1
Heavy Fringe	41.0	44.7	14.2
Light Fringe	25.5	53.8	20.7



Persons who believe most strongly that public radio is an important part of their lives listen to it much more than listeners who do not consider it so important. The higher time spent listening by these listeners is caused primarily by their tuning in to public radio more often, not by their longer duration of listening once tuned in.

Loyalty and amount of use define the four utiligraphic segments explored in Section 2. As Table 43 shows, half of all heavy core listeners strongly agree that public radio is personally important; only one-quarter of the light fringe listeners feel this way.

Use over time also factors into the perception of personal importance. As a group, people who consider public radio personally important have been listening to the station two years longer than other listeners.

There are real and significant differences here that are important to understand. The perception of personal importance is very highly associated with public radio use (occasions) and loyalty (percent of radio listening). *Since programming is the reason people listen, it is clear that programming is the reason people find public radio personally important.*

What is it about programming that causes this use, loyalty, and perception? *Consistency of appeal* plays a critical role. If a station is consistent in its appeal across dayparts and days, it will maximize opportunities for listeners to tune in and use it; people are encouraged to become core listeners, perhaps even heavy core listeners. With heavy and loyal use, public radio becomes personally important in listeners' lives.

Personal importance is of consequence for programmers for three reasons. First, it is tied tightly to mission concerns. What if you ran a public radio service that was important to *nobody*? What if your listeners said that your station was *not* important in their lives — that they would *not* miss it if it were to go away? If making a difference in peoples' lives is part of your station's mission, personal importance is certainly a measure of how well mission is being accomplished.

Second, to the extent that personal importance encompasses aspects of listener satisfaction, building TSL and loyalty are directly related to increasing listener satisfaction.

Third, personal importance is linked closely with listener support. *People for whom public radio is personally important are twice as likely as other listeners to be current members.*

For these reasons, programmers may choose to strive for a high level of personal importance among listeners. People give a public station money because they are satisfied with its service; they find it personally important. This satisfaction is coupled with extensive use of the station's programming; this in itself is a testimonial to mission being accomplished.

As is seen over and over again in AUDIENCE 88, programming tactics that maximize listener satisfaction and encourage use of the station are the most critical *controllable* factors turning listeners into supporters.

Table 44. Personal Importance, Altruistic Importance, and Public Radio Support. The stronger a person's belief that a public radio station is personally important (i.e., important in his or her life) the more likely he or she is to support it.

Casual reading of the tables suggests that support is also associated with a listener's perception of public radio as an asset to the community (altruistic importance). More sophisticated analyses (not shown here) do not support this conclusion. Once station use, personal importance, and education are taken into account, a person's altruistic assessment of public radio has little bearing on support.

Percent Who Agree or Disagree That

	Public Radio Is Personally Important			Score*
	Strongly Agree	Mildly Agree	Disagree	
Current Member	50.3	25.8	25.2	(4.96)
Lapsed Member	16.3	18.5	16.7	(4.58)
Never a Member	28.9	48.0	52.3	(4.33)

	Public Radio Is Altruistically Important			Score**
	Strongly Agree	Mildly Agree	Disagree	
Current Member	43.6	25.8	32.9	(5.15)
Lapsed Member	17.6	16.8	19.5	(4.96)
Never a Member	33.9	49.8	42.9	(4.84)

* Average score on a measurement scale of 1 ("strongly disagree") to 6 ("strongly agree") to the question, "The programming on this [public radio] station is an important part of my life. I would miss it if it were to go away."

** Average score on a measurement scale of 1 ("strongly disagree") to 6 ("strongly agree") to the question, "This [public radio] station is important to many people. It is an asset to the community."

Altruistic Importance

A complementary theory says that people support a public station because it is a "public good." Instead of supporting it because it's something they use, they become members because it's a concept they endorse. Perhaps they believe that it is a community resource, or that it is important to other people even though it's not important to them.

This *altruistic importance* theory states that support is a function of *positioning*, not of use. To these people, public radio is a cause; they become members for the same reasons that they belong (and write checks to) a political party, an environmental group, or an arts patronage society.

AUDIENCE 88 empirically tests this theory for the first time. The AUDIENCE 88 team expected altruistic importance to be an essential factor leading to listener support, and spent a great deal of time with the data trying to tease out evidence supporting the theory. There is little to be found.

Most listeners strongly agree that their public station is an asset to the community; but this belief, by itself, is not why they support public radio. This discovery has important ramifications for how (and why) programming may be done at stations.

The Roots of Altruism

Over 90 percent of all public radio listeners agree with the statement, "This [public radio] station is important to many people. It is an asset to the community." If being an important community service is part of public radio's mission, this finding demonstrates that listeners feel that mission is indeed being accomplished.

The altruistic importance theory holds that the people who feel most strongly about public radio's importance to others should be those most likely to support it. Table 44 shows that this is not the case. Forty-four percent of those who strongly agree with the altruistic importance statement are current members, as are 26 percent of those who agree to some lesser extent. If altruism contributed to support, we would expect very few supporters in the "public radio is *not* a community asset" camp; yet 33 percent of these listeners are members.

Maybe the perception of altruistic importance really *does* cause a person to support public radio, but this relationship is being hidden by other factors, such as market size. This theory states that as markets get smaller, and radio, television, and newspaper sources become scarcer, the public radio outlet should become more highly valued as an asset to the community.

Tests conducted on the stations in the AUDIENCE 88 sample find absolutely no evidence that market size is related to listeners' perceptions of public radio's importance to the community; listeners in the largest markets are just as likely to have an altruistic attitude toward public radio as are listeners in the smallest measured markets. While the sample does not comprise stations in "micro" markets in which public radio may be the only radio station, and which typically consist of 50,000 or fewer persons, the markets it does represent account for well over 90 percent of the U.S. population (and public radio's national audience).

If market size isn't the underlying factor, perhaps the feeling of altruism is generated somehow by programming. The NPR/CPB focus group studies of 1986 suggested that people think well of the public station that airs programming designed for such demographic groups as minorities, women, and children, even though the same people do not listen to this programming.

This theory, then, is that the *availability* of such programming on a public station would be associated with listeners attributing a greater degree of community service to the station, whether they listen to this programming or not.

This theory does not hold up under testing. Indeed, listeners to stations that feature such programming consider these stations *less* of a community resource than do listeners to stations that do not broadcast such programming.

If not the *availability* of programming, then might the *use* of certain programming make listeners think better of the station? In other words, do people consider the station important to the community because they listen to programming on it that they cannot get anywhere else?

This time the tests are positive. But surprisingly, AUDIENCE 88 shows that the programming most highly associated with listeners' perception of community service are NPR's mainstream news and information services — *Morning Edition* and *All Things Considered*. People who listen to public radio's programming targeted for demographically defined groups are much less likely to consider the station to be an important community resource than are *Morning Edition* and *All Things Considered* listeners.

As Section 3 demonstrates, NPR news and information programming serves the most highly educated listeners of any program or format. In addition, it is some of the most professional sounding programming available on public radio.

Examine the listeners most likely to possess altruistic attitudes toward public radio and all of these findings begin to make sense. Altruism is linked strongly to formal education, perhaps because social altruism is in great part a learned virtue. In the same way that the best educated people tend to be those most likely to support museums, art galleries, symphonies, and other cultural resources in the community, they seem to be the most likely to consider public radio a community resource.

Therefore, an altruistic attitude towards public radio can be accounted for by the use of certain services by well-educated persons. Stations broadcasting programming that serves well-educated listeners are the most likely to be considered by these listeners to be important community services.

Use of a public radio station, not the fact that it is perceived as a public good, drives listeners' support and their perception of its importance.

Ramifications and Strategies

Some stations have sought to portray themselves as a community resource by airing discrete programs to demographically diverse groups of people. This strategy runs counter to the tenets of appeal-driven programming, as discussed in Section 3, and has proven over time to serve very few listeners in any particular demographic audience.

But many stations persist with this strategy, assuming that while the audience to such programming may be small at any time, the community will appreciate its efforts and support the station on this merit.

The programming, listening, and perceptual data gathered in AUDIENCE 88 clearly refute this assumption. *Listeners think a station is important to others when it is important to them; if it is not important to them, it is highly unlikely that they think it important to others.*

Listeners assume that programs important to them, programs that they use, are also important to the community in general. They do *not* feel that programs they do *not* listen to make the station more of an asset to the community.

Airing discrete programming for specific population segments excludes more listeners than it embraces, discourages use of the station by listeners otherwise best served by it, makes the station less important to the majority of listeners, and produces lowered assessments of the station's community service.

Therefore, a programmer desiring to enhance listeners' perception of the station as a community service can do so only by making all programming *important to the people who listen*, and ensuring that it conforms closely to the central appeal of the station.

In the end, while the perception of altruistic importance may be a key argument for underwriters, it is not the reason *listeners* support public radio. They support it because they use it, and they use it because its programming appeals to them.

AUDIENCE DIVERSITY

Most public broadcasters aspire to provide programming to a wide variety of listeners. AUDIENCE 88's emphasis on a few listener traits — such as age, education, and VALS characteristics — has raised some concern that public radio listeners are a homogeneous group. This concern prompts us to review the study's data and to remind ourselves that, for all they have in common, public radio listeners are still a diverse group of individuals.

As a group, public radio's audience is remarkable for its level of educational attainment. But this does not mean that *all* listeners are well-educated. While 85 percent of the weekly audience have attended at least one year of college, 15 percent have not; indeed, three percent have not graduated high school. These are not children: AUDIENCE 88 studies only listeners 18 years old or older.

Similarly, while nine in ten (91%) AUDIENCE 88 respondents are white, six percent are black, two percent are Asian, and one percent is Hispanic. Half (51%) of public radio's audience is male, the other half (49%) is female.

Listeners also express great diversity in the ways they describe themselves. For instance, half (52%) of the individuals in the weekly cume consider themselves middle class; 36 percent say they are upper-middle or upper class; and 12 percent think of themselves as lower or lower-middle class.

Politically, almost half (46%) of the individuals in the weekly cume consider themselves liberal; 26 percent think of themselves as “middle of the road;” and 28 percent say they are conservative.

Listeners who share a common characteristic can be quite diverse in a variety of others. This makes it crucial for the reader to distinguish between AUDIENCE 88's segmentation analysis — which by its nature focuses on the similarities of listeners — and stereotypes and cliches. The affluent listener may be black or white; the educated listener may be liberal or conservative; the Societally Conscious art lover may never have gone to college.

5.

APPLICATIONS

The concepts presented in the previous sections have far-reaching implications for public radio programmers. But individual circumstances vary. Rather than diagnosing systemic maladies and writing generalized prescriptions, AUDIENCE 88 informs decision makers with precepts: if an action is taken, it is likely to have a certain effect; if a certain effect is desired, specific actions should be considered. This section discusses how AUDIENCE 88's new information and concepts can be applied by programmers in day-to-day decision making.

The relationship between programming and listeners is quite direct. Every programming decision has an effect on who is attracted and how well they are served. Programming decisions determine the audience public radio now serves, and what audience it might serve in the future.

AUDIENCE 88 arms programmers with new ways of thinking about programming and audiences, and provides a new vocabulary that expresses these thoughts. Its key tenets — core and fringe, appeal and affinity, personal and altruistic importance — are so fundamental that they can be immediately and directly applied by virtually all programmers, in virtually all situations, with a very high degree of confidence.

But individual circumstances vary, and the way each programmer will apply AUDIENCE 88's new concepts and knowledge will vary, too.

AUDIENCE 88 *does not tell programmers what to do or what not to do*; it does not prescribe action. Instead, AUDIENCE 88's new knowledge, concepts, and vocabulary are tools to be mastered, not laws to be obeyed. AUDIENCE 88 *informs programming decision making by linking outcomes to actions*. If a programmer wants to take a specific action, AUDIENCE 88 suggests the most likely results to anticipate. Conversely, if a programmer wants to achieve a specific result, AUDIENCE 88 suggests the actions most likely to yield that outcome.

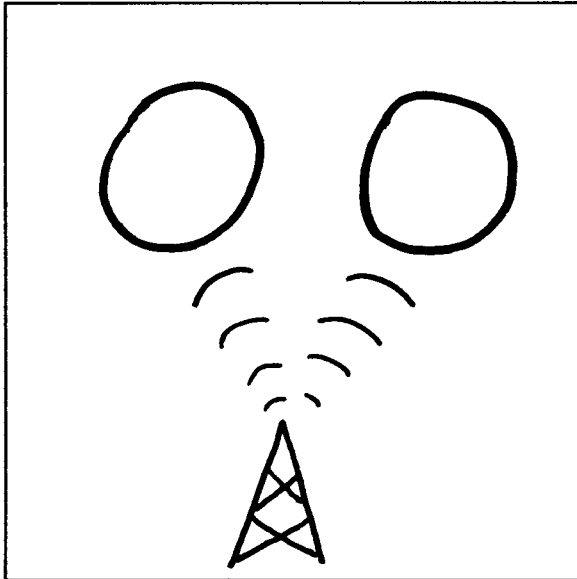
One Station With Adjacent Appeals

Most programmers oversee a single station on which they broadcast a mixture of information and music, spiced with a little drama, a variety show, or some other worthy diversion. Even with this diversity of genres — from jazz to opera and classical to news — public radio attracts and serves generally well-educated individuals. As demonstrated in Section 3, education is what distinguishes people who listen to public radio from people who do not. In this sense, public radio's appeal is fairly *congruent*.

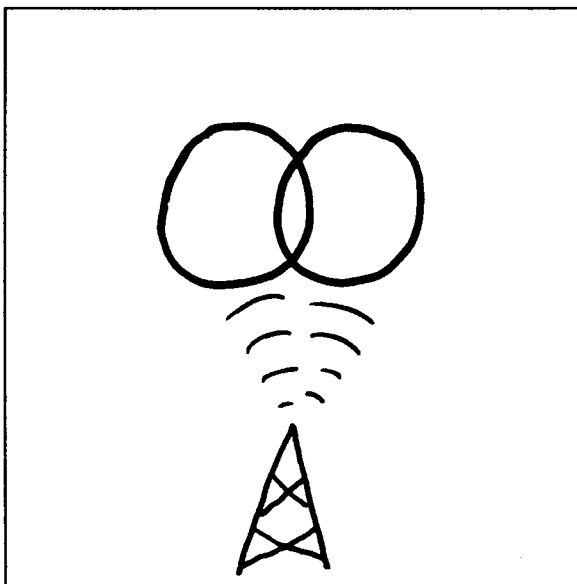
But on closer examination, AUDIENCE 88 reveals that, as currently programmed, different formats attract different *types* of well-educated individuals. Public radio's news, its musics — indeed, every strand of its programming — has its own distinctive appeal, its unique resonance with a particular type of listener. All tend to be well educated, but some are older while others are younger, some are more inner-directed while others are more outer-directed, and so forth.

For instance, nearly two out of three drama and opera listeners have completed college; yet opera listeners are three times more likely to be over 65 years old. So while appealing to audiences that are similar in education, drama's and opera's true appeals are *adjacent*: one is older, one is younger; they attract similar, but not congruent, audiences.

SINGLE-STATION SERVICE MODELS



ONE STATION WITH SPLIT APPEALS

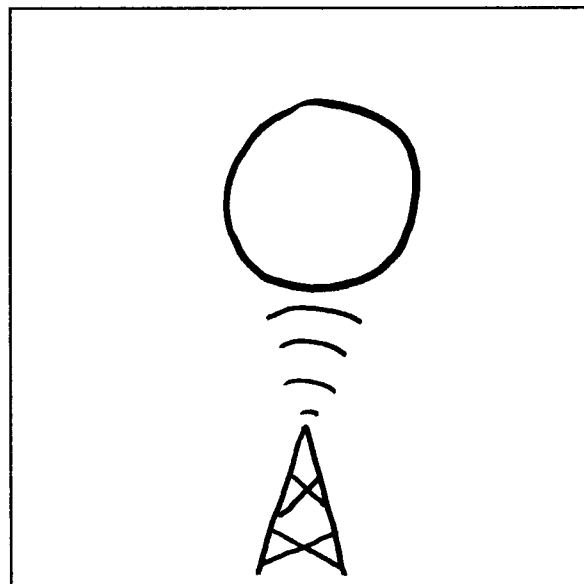


ONE STATION WITH ADJACENT APPEALS

Each box represents the people living in a radio market. The circles represent the types of individuals in the market a station aspires to serve.

By adjusting the appeals of its programming, a station can attempt to serve two or more discrete audiences (upper left), two or more similar audiences (lower left), or a single audience (lower right). Most public stations currently schedule a mixture of adjacent appeals and serve variations of well-educated listeners.

The high degree of congruence among appeals (affinity) does not require bland or homogenous programming. *A Prairie Home Companion* and *All Things Considered* have highly congruent appeals. Their affinity may serve as a model on which to design creative, unique, diverse programming within the tenets of consistent and congruent appeal.



ONE STATION WITH CONGRUENT APPEAL

Adjacent appeals have a decided effect on various aspects of audience service. First, core audience tends to be limited to individuals to whom the diversity of formats appeals. On a station doing classical and information programming, for instance, core listeners are those most likely to use both formats.

This fact may seem self-evident, but consider the cascade of ramifications. For instance, what about the listeners that are in the fringe due to the incongruence of appeal? Many people who listen to *Morning Edition* and/or *All Things Considered*, for example, turn to commercial stations that better appeal to their radio listening tastes during the midday. Most of their radio use between *Morning Edition* and *All Things Considered* is to commercial radio. What they want from radio at that time is typically not what public radio is offering.

This incongruence of appeal between NPR news and midday music causes these listeners to rely less on their public station; causes them to rely more on other stations; causes them to be in the fringe.

A programmer desiring to serve existing listeners better — specifically, to encourage more frequent listening by people in the fringe — might consider narrowing the distance between the appeals of these major programming strands.

Fringe listeners offer a great opportunity to any programmer wishing to increase audience service. They outnumber core listeners two-to-one in the weekly cume. Unlike core listeners, who already spend more time with their public station than any other, fringe listeners have the most *radio* listening time to convert to *public* radio listening time.

A programmer considering whether or not to act on this opportunity will need to consider many things. What is the central appeal of the station's current programming? (Typically it is NPR news, the programming that attracts both core and fringe listeners in greatest numbers.) Is this programming consistent with mission, and should it be retained to anchor the central appeal? If not, what can take its place? If so, what programming is not serving fringe listeners? At what times are they using other stations/formats in the greatest

numbers? What are these stations/formats? (Custom analysis of Arbitron's mechanical diaries can answer the last three questions.) Can the public station hope to serve fringe listeners better than these other stations/formats? Can it retain most of its current core audience in doing so?

Turning fringe listeners into core listeners can be a trade-off: altering the appeal of certain programming may serve more fringe listeners, but it may also drive away those in the core. At current average quarter-hour levels of use, one core listener is worth two and one-half fringe listeners. Therefore, strategies aimed at increasing the breadth (cume) and depth (AQH and TSL) of a station's service must be very carefully evaluated and monitored for their effects on existing core listeners.

Depth of service is also reflected in the number of individuals who consider a public station's programming important in their lives. A listener's perception of the personal importance of public radio's service is very strongly related to that person's *use* of public radio. Because core listeners use public radio more than any other station, they are much more likely to consider public radio personally important.

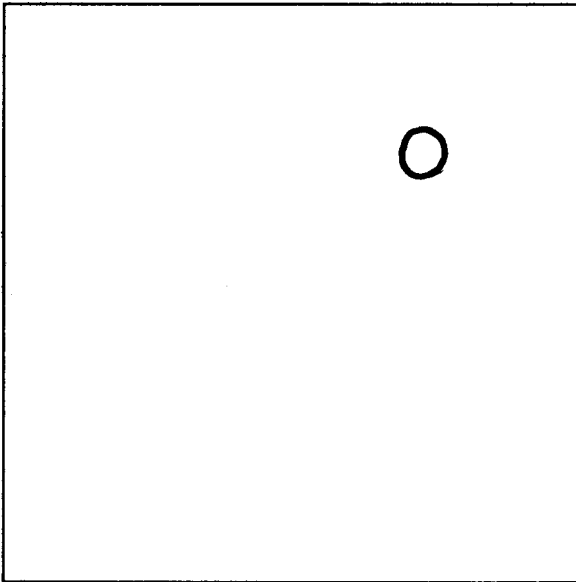
Therefore, by reducing the disparity between various formats' appeals, and thereby moving more people into the core, a programmer can make a station more important to a greater number of people.

This strategy moves the service away from a set of program elements with adjacent appeals, and moves it towards a set of program elements sharing much higher affinity, or congruent appeal.

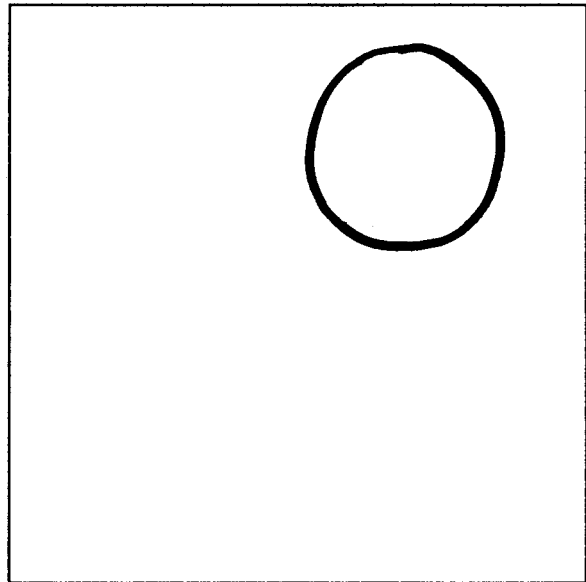
One Station With Congruent Appeal

The foundation of the congruent appeal strategy is the shaping of the schedule into a sound, a viewpoint, an attitude that reflects the station's mission and that speaks to listeners with a compelling and coherent voice. By consistently appealing to the values and lifestyles, the information and entertainment needs of a specific type of person, a station becomes more appealing and more important to the people in that audience segment.

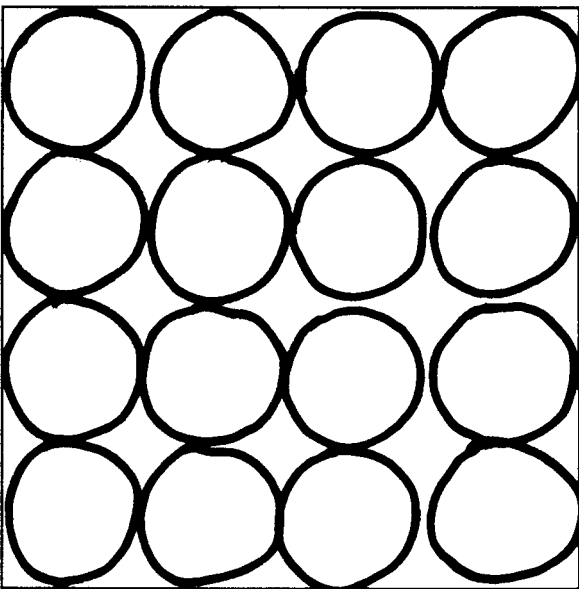
DESIGN AND CONSEQUENCE



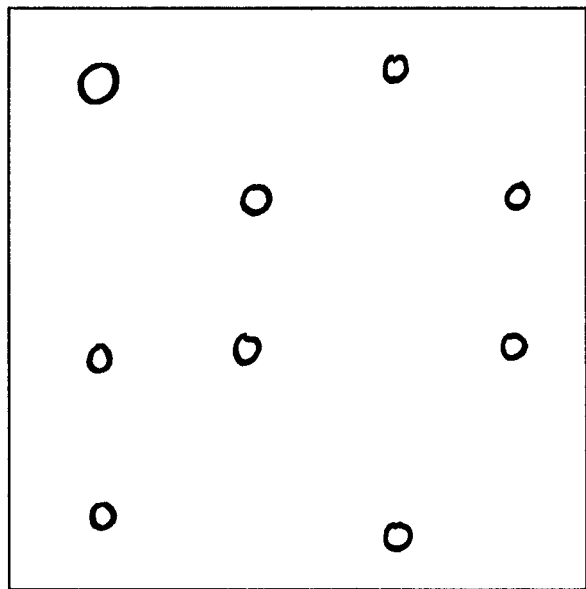
CONGRUENT APPEAL IN THEORY



CONGRUENT APPEAL IN PRACTICE



SPLIT APPEAL IN THEORY



SPLIT APPEAL IN PRACTICE

To many programmers, consistent appeal means adopting an “all” format, such as “all news” or “all classical.” This *genre-defined* approach to formatting has served some stations well. But as the highly congruent appeals of *All Things Considered* and *A Prairie Home Companion* demonstrate, *a program’s or format’s appeal is not determined solely by its genre. Apparently diverse formats can have very strong affinity.* They can appeal to the same pool of listeners.

Appealing to a group’s “mindset” is the key. What attitudes do these individuals have? What vocabulary do they use? What are their information needs and entertainment preferences? Under the congruent appeal model, a wide range and mixture of programming that “speaks to,” “resonates with,” or “clicks with” a particular group of listeners can shape a program schedule that offers totally consistent and congruent appeal.

AUDIENCE 88 strongly suggests that *audience service is maximized when a program schedule appeals to one type of listener all the time*; audience service is maximized by the single-minded attention to the needs and wants of a single pool of listeners.

This may seem paradoxical; how can audience service be maximized by consciously *excluding* certain individuals? Quite simply, that’s how radio works. In a mature and highly targeted medium such as radio, most people will not listen to most stations. They are excluded, by design and by choice, from most stations’ audiences.

Since no station can be all things to all people in this environment, each airs an appeal targeted at a segment of the market. (By a segment we mean a group of people who are, among themselves, pretty much alike, but who are different in comparison to people not in the segment — i.e., non-listeners.) This creates a diversity of appeals across stations that offers listeners greater choice of programming, and greater satisfaction with their programming of choice.

But while diversity of appeals *across* stations increases listener satisfaction, diversity of appeals *within* a radio station *decreases* listener satisfaction. When appeal is constant, listeners can tune

in regularly and be consistently satisfied. When appeal changes, as it does on most public stations, regular tune-in is discouraged because listeners don’t always get what appeals to them. Occasions are discouraged; “appeal seams” truncate duration. Time spent listening is thereby reduced, and along with it average quarter-hour audience. Listeners are far less likely to consider the station important in their lives; they are even less likely to support it financially.

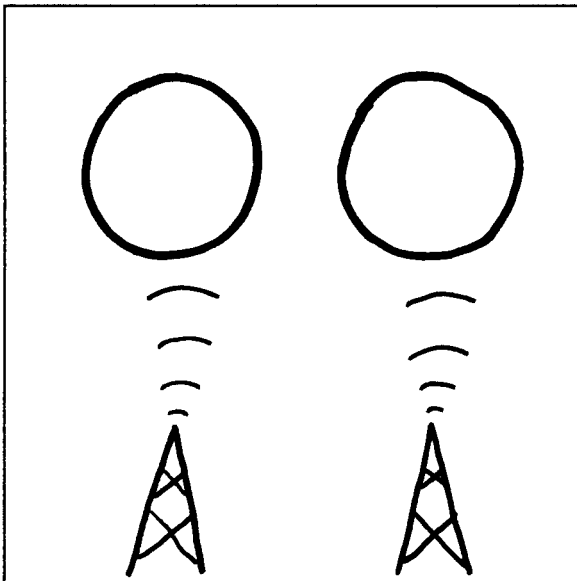
Programmers wishing to unify their stations’ appeals may have a hard time of it initially. Virtually all public radio programming is currently defined in *genre-driven* rather than *appeal-driven* terms, and the immediate options narrow themselves to the resources available. Is an appeal-defined music format available from the satellite? Does it match the appeal the station requires or desires? Does the station have the records, the talent, the research, and the intuition to produce this service locally? Can it survive a possible shake-out of many of its current core listeners while it builds from its fringe? Can it achieve a net gain in listeners? In listeners feeling the service is important? In members? What happens if it fails?

Clearly the movement from an adjacent to a congruent appeal entails the management of risks. There is safety and predictability in a genre-defined service — the content of which, by definition, is limited to a particular genre. Content selection is opened wide in an appeal-defined service — often too wide for inadroit practitioners.

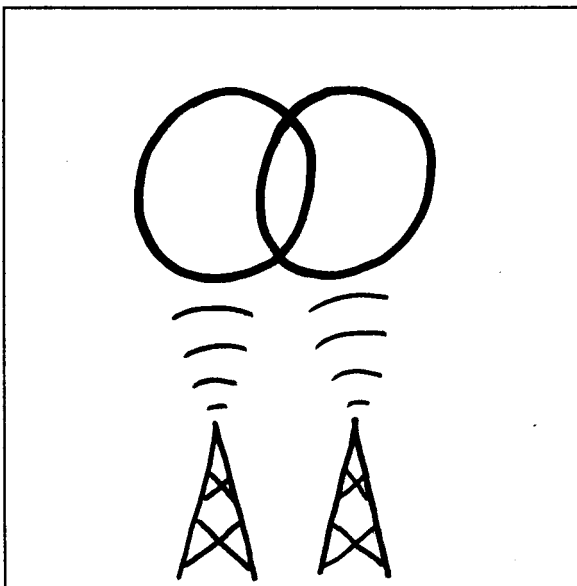
But an appeal-driven format also holds great opportunities, not only in the number of listeners served; the number of listeners considering the service personally important; and the number of listeners supporting the service, but also in terms of the challenge to programmers to unleash their imaginations and talents to create a diversity of unique, high-quality programming in the service of a well-defined audience.

For instance, what types of music, information, regular features, or specials fit into a service built around a singular appeal? How might stations, independents, and national services pool their talents to create such an appeal to serve such an audience?

MULTIPLE-STATION SERVICE MODELS



TWO STATIONS SPLITTING APPEALS

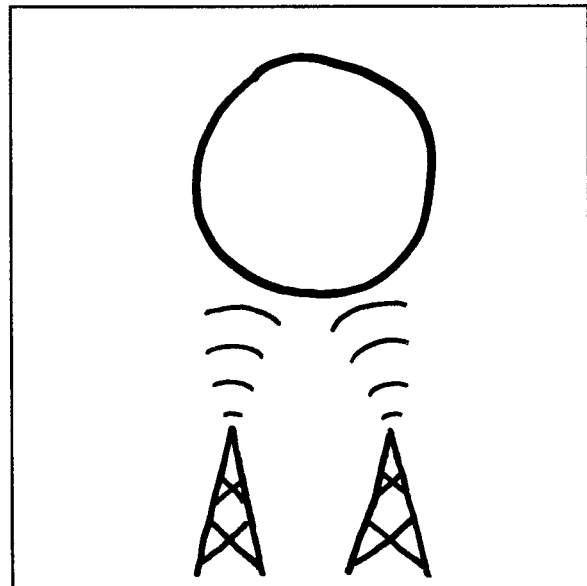


TWO STATIONS WITH ADJACENT APPEALS

Each box represents the people living in a radio market. The circles represent the types of individuals in the market each station aspires to serve. These examples assume that each station broadcasts an internally congruent appeal — that is, it seeks to serve a single type of person all of the time.

By adjusting the appeals of their programming, two stations can serve two discrete audiences, two similar audiences, or a single audience. Most public stations in multiple-service markets are broadcasting adjacent appeals, although some, particularly those owned and operated by minorities, have split appeals and serve very different types of listeners.

Because of the demographic differences between AM and FM listeners, an AM/FM joint licensee is highly unlikely to serve the same audience with each station.



TWO STATIONS WITH CONGRUENT APPEALS

One Station With Split Appeals

When a station broadcasts programming with adjacent appeals, it straddles a middle-ground between congruent appeal (programming to serve a single pool of listeners) and *split* appeal (programming to serve disparate groups of people).

In the last decade there has been general movement away from the split appeal model of programming to the adjacent appeal model. Still, many stations (community licensees in particular) continue to broadcast programming hoping to reach specific demographic groups — often very large groups, such as “children,” and sometimes very small groups, such as tiny ethnic populations.

Such programming strives to be very specific in its appeal, but by definition it is much more *exclusive* than *inclusive*. These programs cause the appeal of a station to change dramatically from day to day, from hour to hour.

Many public broadcasters know from experience that patching together a program schedule of highly exclusive and disparate appeals serves relatively few people at any given time. But this approach still has its proponents who assume that the program service makes the station an important and valued community resource, even if most people in the community do not listen.

AUDIENCE 88 finds that listeners to stations that do such programming do *not* believe the station is the community resource that many programmers think it is. Use is the reason.

People use a radio station because its programming appeals to *them*. The more a station’s programming excludes them from its appeal, the less often they will use the station. Since frequency of use is very highly associated with listeners considering a station important in their lives, the split appeal strategy attenuates personal importance, which in turn attenuates listener support.

Therefore, a station adopting a split appeal strategy in order to make itself an important and valued asset to the community is likely to be a station that is personally important in the lives of few individuals — at least, fewer than might be served with a strategy of adjacent or congruent appeals.

Two or More Stations

Up to this point the discussion of comparative audience service strategies has wandered a one-dimensional continuum between split appeal and congruent appeal. Public radio is full of examples of stations all along this continuum, some more successful than others.

But the environment is different when there are two or more public stations in a market. With the pressure lessened for each station to be all things to all people, each station can maximize its level of service to its particular audience by adopting a more consistent, perhaps even totally congruent, appeal. The question then becomes, how “different” can each station be from the other in its appeal? Here too, the split, adjacent, and congruent models prove instructive.

Multi-station models can actually be multi-outlet models. In lieu of a second broadcast frequency, for instance, some public stations are programming audio services delivered via cable. Different outlets can serve different audience segments in particular circumstances.

All stations in a multi-outlet model need not be under a single programmer’s control. This is, in fact, the reality of most multiple-service markets today. The public is most likely to benefit when programmers at each station can work together to maximize audience service.

Multiple Outlets With Split Appeals

In the split appeal model, one station’s audience has nothing in common with another station’s. They serve two distinct groups of individuals; appeals and audiences do not overlap. Each station maximizes use by its own pool of core listeners, and thereby maximizes its importance to its audience.

While the split appeal model describes certain combinations of commercial formats — an AM Music of Your Life station compared to an FM AOR rocker, for instance — it does not describe any public radio situation today. As illustrated in Section 3, the overwhelming majority of public radio’s current program elements share a keen appeal to educated listeners.

So even for all the shading of appeal discussed in Section 3 — shadings described by differing age, gender, and VALS compositions — this bond of service to the educated listener almost assures that public stations in a multiple station environment will have adjacent appeals.

A split appeal will require programming not now heard on public radio; vast amounts of new programming will need to be produced or acquired in order to keep a split appeal station on the air seven days each week, 18 or more hours each day.

AUDIENCE 88 strongly suggests that the types of people attracted to a radio service — their values, attitudes, and lifestyles — reflect those of the people who produce the service. Therefore, a differentiation in appeal may very well involve differentiation of personnel.

Multiple Outlets With Adjacent Appeals

In nearly all cases where two or more public stations overlap, listeners are being served by mixtures of programming with adjacent appeals. When two unaffiliated stations operate in the same market, the well-educated and adjacent appeals of news, classical music, and jazz typically predominate. Add a third unaffiliated station and other well-educated and adjacent appeals enter the picture.

This scenario also holds true for joint licensees. The AM station typically carries news, information, and talk for well-educated listeners; the FM typically carries classical music and perhaps some jazz and folk — again, all for well-educated listeners.

Two stations sharing adjacent appeals can serve listeners synergistically. Each station has its own core, which it would have regardless of how close or distant the appeal of the other station. However, since the two appeals are adjacent, listeners to one station are likely to listen to the other. They may not be in the core audience of either station, but they may be core to the pair when their listening to both stations is summed. In short, the core for the two stations is larger than the sum of the cores for the individual stations.

AUDIENCE 88 shows that core listeners are much

more likely than others to consider public radio personally important and to send it money. This is clearly the case when core listeners are generated by multiple services. People who listen to two or more public stations are nearly 50 percent more likely than other listeners to support at least one of these stations.

AUDIENCE 88's appeal studies show that public radio's current programming serves well-educated listeners best. Therefore, stations programming adjacent appeals in public radio's current environment are serving, by definition, different types of well-educated listeners.

AUDIENCE 88's affinity studies suggest how current programs and program types may be apportioned between stations to maximize service to each station's audience. This strategy would make each station's appeal more congruent; and by having a component of appeal common to each, it would encourage crossover between stations. For instance, one station might cater to older people, while the other caters to younger people; or one might serve the Inner-Directed and the other the Outer-Directed. Whatever the difference, the two stations would share appeal to educated persons.

Multiple Outlets With Congruent Appeals

Rounding out this set of strategies is the model of two or more stations in the same market serving exactly the same individuals. On one hand, this model includes the total redundancy of simulcasting, where each station concurrently carries the same programming as the other. On the other hand, the model encompasses programming strategies that serve different needs of the same listeners.

An example in this latter vein is a news/information/talk and music division, in which the same pool of listeners can turn to either depending on their needs and desires at that time. Each station can promote the other in this situation. Listeners can tune back and forth as is their wont.

As with stations sharing adjacent appeals, the core of the combined audiences will exceed the sum of the individual stations' cores. Greater personal importance and higher levels of support result.

Given the current radio environment, the strategy of congruent appeals on multiple outlets can probably only occur on an FM/FM or AM/AM combination. This will be harder to achieve in split media — AM/FM, broadcast/cable — because the media themselves exert an influence on appeal.

For instance, the intent of many AM/FM operations is to serve the same listeners with two different streams of programming. And while many people do cross over from one station to the other, this intent will be virtually impossible to realize as long as AM's average quarter-hour audience remains 10 to 20 years older than FM's. Mixing media in this way virtually prohibits realization of a congruent appeal across media; the best that can be attained is adjacent appeal.

Conclusion

Many programmers will find cause to look at their programming after reading this AUDIENCE 88 report. What decisions does it inform? What steps should be taken?

AUDIENCE 88 informs these questions with its better understanding of the relationships between programming and audiences — linking the actions that might be taken to the resulting reactions that might be expected. This report seeks to put programmers in control of AUDIENCE 88's new knowledge and concepts; it does not seek to control the actions of programmers.

Programmers are the final arbiters of all programming information. Program directors must hold their purpose clearly in their own minds, whether it be to serve the largest audience, the neediest audience, the most loyal audience, the most appreciative audience, or the most supportive audience. In the service of this "mission" they can choose what audience segment(s) to serve, and how.

Program producers must decide what type of listener their programming intends to serve. Those

who produce creative, quality programming that appeals to the audience segment(s) targeted by stations are certainly more likely to flourish and to make their mark on listeners than those who disregard the needs of the marketplace.

Program distributors can assemble from diverse sources packages or streams of programming that serve a consistent audience segment. Given AUDIENCE 88's finding that apparently diverse programming can have a high degree of affinity, distributors may experiment with appeal-driven services designed for a particular audience's range of tastes.

Program funders can apply AUDIENCE 88's findings to revisit their assumptions and test whether the actual audience effects of their programming are what they intended.

No study can anticipate the diverse range of goals, resources, and operating environments, nor can it address all aspects of such complex decision making. However, AUDIENCE 88's interrelated concepts of utiligraphic segmentation, appeal, and personal importance provide a vocabulary that program directors, producers, distributors, and funders can apply in their day-to-day dealings and in their long-term planning.

Perhaps AUDIENCE 88's most significant limitation is its study of programming *as currently being done*: no study can predict with certainty the effects of programming as it *might* be done. AUDIENCE 88 shows from an audience-based perspective why *A Prairie Home Companion* performed so well; and it predicts with some certainty that a high-quality program, unique to public radio, stands a chance of performing as well *as long as it embodies public radio's central appeal*; but it is up to the creative talent to realize such programming. No study can predict what it will be, where it will come from, or what it will sound like.

This is the challenge — and opportunity — shared by all public radio programmers.



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Technical Report

by David Giovannoni
(24 pages)

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Technical Report

Prepared by:

David Giovannoni

Audience Research Analysis

Silver Spring, MD



A COMPREHENSIVE ANALYSIS
OF PUBLIC RADIO LISTENERS

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1.

SAMPLING AND WEIGHTING

Any study is only as good as its database. Great care has been taken in the production of the AUDIENCE 88 database to ensure the most reliable and valid data source possible. This section explains how the beginning sample was obtained, how the study was administered, and how the responses have been weighted to compensate for non-response bias by age and gender.

The Samples

AUDIENCE 88: A COMPREHENSIVE ANALYSIS OF PUBLIC RADIO'S LISTENERS is based on a starting sample of 6,315 Arbitron diaries — each one the radio listening log of a person at least eighteen years old who listened to a National Public Radio member station in Spring 1986. NPR has demonstrated that this sample of 72 stations in 42 markets represents its system of member stations across market size, licensee type, and programming emphasis; the sample is the basis for all audience estimates produced by the Public Radio Audience Profile (PRAP) system for Spring 1986.

Nathan Shaw, president of the Development Exchange, Inc., in Washington, DC, verified that all of these stations were actively soliciting listener support as of Spring 1986.

NPR participated in this study by providing a data tape of the PRAP diary data. Audience Research Analysis created the *beginning sample* by removing all duplicate diaries and diaries kept by persons less than 18 years of age. Included with unique diary identification information for each listener were the call letters of the public station used most by the diary keeper.

Arbitron sent re-interview questionnaires to all 6,315 public radio listeners in the beginning sample. (This list is confidential and not released by Arbitron.) The company enclosed a dollar bill to increase the rate of response; two weeks later it followed-up with a reminder postcard to all persons (Section 3).

A total of 4,268 persons returned usable questionnaires before the cutoff date — an excellent 68% return rate. The AUDIENCE 88 database is based on these 4,268 *respondents* (Table 1).

Table 2 displays the size of the beginning and the responding samples by station.

Table 1. Questionnaire Completion Status.

Of the 6,315 questionnaires sent to public radio diary keepers, over two-thirds (67.6%) were returned completed and usable.

	<u>CASES</u>	<u>PERCENT</u>
Beginning Sample	6,315	100.0
Returned Usable	4,268	67.6
Not Returned	1,680	26.6
Returned Unusable	128	2.0
Returned Blank	97	1.5
Returned Late	73	1.2
Non-Deliverable	69	1.1

Weighting the Beginning Sample

Each of the 6,315 diaries in the beginning PRAP sample contains a weight called the Persons Per Diary Value. PPDV is a function of geographic sampling unit, age, gender, and (in sampling units in which Arbitron controls for it) race. This weighting value is assigned by Arbitron and used in the production of all audience estimates. AUDIENCE 88 employs Arbitron's PPDV in its

weighting of diaries in the beginning sample, as follows:

$$881.86 = \frac{5,568,970}{6,315} \begin{matrix} \text{(Beginning sample audience)} \\ \text{(Diaries in beginning sample)} \end{matrix}$$

- All projections to national audience are based on the PPDV times a projection factor of 1.84, where:

$$1.84 = \frac{10,233,500 \text{ (National audience)}}{5,568,970 \text{ (Beginning sample audience — sum of PPDVs in beginning sample diaries)}}$$

- All statistical tests are based on the PPDV divided by the average PPDV (881.86) of the beginning sample:

Weighting the Respondent Sample

This study assumes that the beginning PRAP sample is representative of the public radio audience. But this assumption doesn't hold for the responding sample; persons in certain demographics are more likely to return questionnaires than others. Indeed, statistical analysis verifies significant non-response among groups for this study.

Table 2. Sample Size and Return Rates by Station. Shown below are questionnaire return rates for listeners to each NPR member station in the sample. For instance, KALW-FM was mentioned in 34 beginning sample diaries. A total of 25 of these persons returned usable questionnaires, for a return rate of 73.5 percent.

Station	Beginning Sample	Did Not Respond	Did Respond	Return Rate %	Station	Beginning Sample	Did Not Respond	Did Respond	Return Rate %
KALW-FM	34	9	25	73.5	WCAL-FM	22	8	14	63.6
KBPS-AM	13	3	10	76.9	WCMU-FM	60	19	41	68.3
KBPS-FM	15	6	9	60.0	WDET-FM	100	38	62	62.0
KCFR-FM	172	53	119	69.2	WDUQ-FM	32	12	20	62.5
KCRW-FM	104	35	69	66.3	WEAA-FM	58	29	29	50.0
KCSU-FM	10	5	5	50.0	WEBR-AM	127	41	86	67.7
KERA-FM	127	52	75	59.1	WEMU-FM	24	9	15	62.5
KLCC-FM	82	26	56	68.3	WERN-FM	88	23	65	73.9
KLON-FM	44	22	22	50.0	WETA-FM	167	51	116	69.5
KOAC-AM	42	13	29	69.0	WFCR-FM	134	52	82	61.2
KOAP-FM	87	24	63	72.4	WFSU-FM	125	32	93	74.4
KPBS-FM	108	35	73	67.6	WGBH-FM	328	101	227	69.2
KPLU-FM	36	15	21	58.3	WGTE-FM	73	10	63	86.3
KQED-FM	169	73	96	56.8	WGUC-FM	103	26	77	74.8
KSJN-AM	47	17	30	63.8	WHA-AM	66	20	46	69.7
KSJN-FM	166	52	114	68.7	WHYY-FM	174	59	115	66.1
KSUI-FM	40	13	27	67.5	WIAN-FM	99	39	60	60.6
KUAT-AM	22	9	13	59.1	WITF-FM	206	56	150	72.8
KUAT-FM	84	34	50	59.5	WKAR-AM	40	10	30	75.0
KUER-FM	64	13	51	79.7	WKAR-FM	114	23	91	79.8
KUNC-FM	41	16	25	61.0	WMUK-FM	94	24	70	74.5
KUNI-FM	89	22	67	75.3	WNYC-AM	70	25	45	64.3
KUOP-FM	91	30	61	67.0	WNYC-FM	146	50	96	65.8
KUOW-FM	107	39	68	63.6	WOI-AM	48	9	39	81.3
KUSU-FM	5	2	3	60.0	WOI-FM	74	12	62	83.8
KWAX-FM	54	22	32	59.3	WPKT-FM	111	36	75	67.6
KXPR-FM	143	56	87	60.8	WQED-FM	83	26	57	68.7
WABE-FM	97	27	70	72.2	WSUI-AM	34	15	19	55.9
WAJC-FM	25	11	14	56.0	WUNC-FM	164	44	120	73.2
WAMC-FM	76	22	54	71.1	WUOM-FM	56	23	33	58.9
WAMU-FM	151	49	102	67.5	WUSF-FM	158	50	108	68.4
WBEZ-FM	110	35	75	68.2	WUWM-FM	67	20	47	70.1
WBFO-FM	44	13	31	70.5	WVGR-FM	84	32	52	61.9
WBGO-FM	67	30	37	55.2	WVXU-FM	100	27	73	73.0
WBJC-FM	100	32	68	68.0	WWNO-FM	85	29	56	65.9
WBUR-FM	123	51	72	58.5					
WCAL-AM	12	1	11	91.7	TOTAL	6,315	2,047	4,268	67.6

To compensate for non-response among age and gender groups, weights are applied based on the distribution of age/gender groups in the PRAP sample compared with their distribution among respondents, as follows:

$$W_g = (O_g/O_t)/(R_g/R_t)$$

where W_g = Weighting Factor for group

O_g = Original Diaries in group

O_t = Total Original Diaries

R_t = Total Responses

R_g = Responses from group

This weighting factor (Table 3) is applied to the PPDV assigned to each diary by Arbitron, thus retaining the weighting of the beginning sample and assuring a sample of respondents representative of the NPR member station audience — at least across age and gender variables.

This combined weighting scheme is applied as follows:

- All projections to national audience are based on this weight times a projection factor of 2.79, where:

$$2.79 = \frac{10,233,500 \text{ (National audience)}}{3,662,544 \text{ (Respondent audience — sum of PPDVs among respondents)}}$$

- All statistical tests are based on this weight divided by the average weight (858.14) of the sub-sample of respondents:

$$858.14 = \frac{3,662,544 \text{ (Respondent audience)}}{4,268 \text{ (Respondent diaries)}}$$

Table 3. Weights Applied to the Sub-Sample of Respondents. Responses of persons returning usable questionnaires are re-weighted to compensate for response bias by gender and age. For instance, men between the ages of 18-24 years old comprise 3.8 percent of the beginning PRAP sample, yet they account for only 3.2 percent of all persons returning questionnaires. To compensate for their low response, their weight in the sub-sample is increased by a factor of 1.21.

Age	Percent of Beginning Sample		Percent of Respondents		Weighting Factor	
	Men	Wmn	Men	Wmn	Men	Wmn
18-24	3.8	2.6	3.2	1.8	1.21	1.47
25-29	6.5	4.3	5.6	4.1	1.16	1.04
30-34	8.9	6.2	8.5	6.4	1.05	.97
35-39	7.9	6.1	7.9	6.3	1.00	.96
40-44	5.5	4.5	6.2	3.9	.90	1.14
45-49	4.3	3.0	4.5	3.0	.96	.99
50-54	4.3	3.2	4.7	3.2	.93	1.00
55-59	3.9	3.4	4.3	3.6	.90	.95
60-64	3.2	3.1	3.6	3.6	.87	.88
65-69	2.9	3.5	3.0	3.7	.96	.94
70-74	1.7	2.5	1.6	2.6	1.01	.95
75+	1.7	3.1	1.7	3.0	1.02	1.03

2. ARBITRON'S DESCRIPTION OF METHODOLOGY

*Arbitron's Marketing Research Services department conducted the re-interview portion of this study.
In this section, Arbitron describes its method.*

Values, Lifestyles, and Geodemographics of Public Radio Listeners

Description of Methodology

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May 1987

Restrictions on the Use of This Study

This study contains data proprietary to Arbitron Ratings Company and is provided to Arbitron Ratings' clients pursuant to special orders received from such clients. Clients are permitted to quote reasonable amounts of data from this study on the condition that Arbitron Ratings be identified as the source.

Arbitron Ratings recommends that the appropriate market, survey period, survey area, universe, sample size, and method be stated and that it be noted that the data are subject to the qualifications given in the Arbitron Ratings' study.

Users of this study are referred to the current policies of the federal government relating to the use of audience information. Neither this study nor any of its contents may be used in any manner by non-clients of Arbitron Ratings without written permission from Arbitron Ratings.

Limitations

This study is not part of a regular syndicated rating service accredited by the Electronic Media Ratings Council (EMRC). The Arbitron Ratings Company has not applied for EMRC accreditation with respect to this study. Arbitron Ratings does provide other syndicated services which are accredited by the EMRC.

All Arbitron Ratings' audience data are estimates which are subject to the limitations inherent in Arbitron Ratings' methods. Due to these limitations, the accuracy of Arbitron Ratings' audience estimates cannot be determined to any precise mathematical degree or value.

Estimates appearing in this report are to be read only within the framework of the definitions set forth for the universe and the survey area. Projections or other types of generalizations based on the findings in this report to persons falling outside the sampling frame should not be made unless accompanied by appropriate and qualifying supporting data. In addition, the following limitations apply to this study and should be considered whenever the results are being evaluated or presented.

1. Use of returned diaries as a sampling frame automatically eliminates:
 - Persons who kept but did not return a diary;
 - Persons who returned unusable diaries;
 - Persons who refused to keep a diary;
 - Persons who were eliminated from the sampling frame due to human errors when the diaries were processed.

It should be noted that some diary entries may have been made on the basis of hearsay, recall, or the estimate of the diarykeeper.

2. Use of a client supplied list of returned diaries as a sampling frame is further limited to the extent that the list includes all possible members of the population and that addresses of respondents are up-to-date.
3. Non-responding individuals may have some effect on the survey results to the extent that responses from nonparticipating or non-contacted individuals might differ from those obtained. (Refer to Section 4, *Non-Response Levels*, for an examination of estimated non-response effect on PRIZM and ClusterPlus segments.)
4. Any estimates based on a sample are subject to sampling deviation. The extent of deviation is a function of sample size and magnitude of observation.
5. Although instructions were provided to the respondents for completing the questionnaire, there may be instances where instructions were not followed or understood by the respondent. Because of this and other human factors (such as recording and processing errors), the degree of statistical variation in this study could be greater than that expected from sampling deviation errors alone.

Warning

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could subject the infringer to civil damages of up to \$50,000 and criminal penalties of up to one year imprisonment and a \$10,000 fine pursuant to Sections 504 and 506 of the Federal Copyright Revision Act of 1976.

Purpose and Background

Arbitron Ratings has conducted a national study for Audience Research Analysis among previous Arbitron diarykeepers who indicated listening to public radio stations. This study was conducted with a specially designed mail questionnaire and concentrated on the following research objectives:

- To categorize public radio listeners according to VALS¹ type;
- To classify public radio listeners according to zip cluster and cluster group as defined by the ClusterPlus² system;
- To categorize public radio listeners according to block group as defined by the PRIZM³ system;
- To combine the above information with information on listening behavior and attitudes towards public radio.

Survey Period

The survey period was March 6 - April 3, 1987. Questionnaires were mailed on March 6; the cut-off date for accepting returned questionnaires was April 3.

Sample Frame

The sample frame consisted of previous diarykeepers from Arbitron ratings' Spring 1986 radio survey period.

Sample Selection

From the diarybase, Audience Research Analysis selected diarykeepers, 12 years of age and older, who indicated listening to a public radio station for at least one quarter-hour. Audience Research

Analysis provided this information to Arbitron Ratings on a data tape.

Sample Size

From a starting sample of 6,601 diarykeepers, 153 were eliminated due to duplication, missing addresses, or inconsistencies. Therefore, the actual starting sample was 6,448 diarykeepers. ClusterPlus and PRIZM data have been provided based on this starting sample. An additional 133 teenage diarykeepers, 12-18 years of age, were eliminated from the sample prior to mailing the questionnaire.

Of the 6,315 questionnaires mailed, 4,268 were returned completed. Of these, 44 were returned with missing gender and/or age data from the respondent. Therefore, these respondents may or may not be the actual designated respondents who were asked to complete the questionnaire. (Refer to Table 1 for the Questionnaire Completion Status.)

Data Collection Method

A self-administered questionnaire served as the data collection instrument. The questionnaire items concerning listening behavior and attitudes towards public radio were designed by Audience Research Analysis and finalized by Arbitron. The battery of questions used to categorize respondents by the VALS type was developed by SRI International.⁴

This questionnaire, along with a cover letter signed by Jeff Barber, Arbitron Ratings' Project Director in the Marketing Research Services department, was sent to all individuals in the sample aged 18 and over. The first page of the questionnaire consisted of instructions and examples of how to complete the questionnaire. It also indicated the sex and age of the designated respondent in the household who was to complete the questionnaire.

All questionnaires were mailed First Class with mailing address labels. Enclosed with the questionnaire was a printed, postage-paid return envelope addressed to the Arbitron Ratings Data Collection facility. Each envelope also contained a one-dollar cash incentive premium. A postcard, reminding the respondent to complete and return the questionnaire if he or she had not already done so, was mailed to

each respondent approximately ten days after the questionnaire was sent.

Audience Segmentation

Three segmentation schemes were employed to classify respondents. An outline of each segmentation scheme is presented below. AUDIENCE 88's *Terms & Concepts* volume described in detail the methods and segments used by the ClusterPlus, PRIZM, and VALS systems.

ClusterPlus

Using residential zip code information, each respondent in the starting sample (6,448) was classified into one of ten geodemographic Cluster Groups, and one of the 47 Zip Clusters that are established in Donnelley Marketing Information Services' ClusterPlus system.

PRIZM

From a list of addresses, each respondent in the starting sample (6,448) was assigned a block-group

code indicating membership in a particular block-group.⁵ The data on block-group membership was then merged with information on PRIZM lifestyle clusters (at the block-group level of classification) to enable crosstabulation of known public radio listeners by PRIZM lifestyle clusters.

Values and Lifestyles (VALS)

There were 32 questions in the VALS battery⁴ that were included in the questionnaire. Replies to these questions were used to classify respondents according to the VALS typology — Survivor, Sustainer, Belonger, Emulator, Achiever, I-Am-Me, Experiential, and Societally Conscious.

Not all respondents who returned questionnaires (4,268) were classified by VALS type. Those respondents who reported being employed full-time were excluded from VALS classification if they failed to answer four or more of the VALS questions. Respondents who reported their occupational status as either a homemaker, student, or retiree were disqualified from classification if they failed to answer four or more of the VALS questions with the exception of question 16. A total of 184 respondents were not classified by VALS type.

-
1. VALS is a service of SRI International.
 2. ClusterPlus is a service of Donnelley Marketing Information Services, Inc.
 3. PRIZM is a service of Claritas Corporation.
 4. The VALS questions are numbers 16-41, 44-46, and 48 in the questionnaire. Section 3 contains a copy of the full instrument.
 5. The "block-group cluster system" is based on 215,000 Census micro-units (Block Groups and Enumeration Districts) averaging about 300 households per block-group.

3.

THE QUESTIONNAIRE

The AUDIENCE 88 study stands on the shoulders of the giant Public Radio Audience Profile (PRAP) database. Given PRAP's full knowledge of listeners' use of public radio's programs and formats (as well as their listening to non-public radio) AUDIENCE 88 ascertained even more information about listeners through the use of a self-administered questionnaire.

Design

ARA drafted versions of the survey instrument in November and December, 1986, based on suggestions by Ted Coltman of CPB's Policy and Planning office, Linda Liebold of Liebold & Associates, Inc., Tom Thomas and Terry Clifford of Thomas & Clifford, Inc., and other public broadcasters familiar with the purpose and information needs of the study.

Jeff Barber, Arbitron's Marketing Research Services Project Director for this study, worked with ARA and Arbitron staff in the questionnaire's final design and layout.

The Survey Instrument

The survey instrument was pre-tested on an audience of public radio and survey research professionals; no problems were found with the survey through pre-testing. Arbitron reports no significant problems with the questionnaire — either in the administration of the instrument or in respondents' comprehension of the questions.

Following is the questionnaire, cover letter, and reminder postcard as sent by Arbitron to the 6,315 persons in the beginning sample.

INSTRUCTIONS

Please have the person in your household who is _____ and _____ years of age complete this questionnaire.

There are three basic types of questions asked in this survey:

1 SINGLE ANSWER QUESTIONS EXAMPLE: (circle code)

In what county do you live?

- Green — 1
- Parkview — 2
- Ellis — ③
- Tarlow — 4
- Peachtree — 5
- Mapleton — 6
- Other — 7

2 MULTIPLE ANSWER QUESTIONS EXAMPLE: (circle all that apply)

Which of the following types of music do you listen to?

- Classical — ①
- Rock — 1
- Country — ①
- Jazz — 1
- Beautiful Music — 1
- Other — 1

3 OPEN ENDED ANSWER QUESTIONS EXAMPLE: (write in)

What radio personality do you listen to most often?

Frank Fremont

So that we will receive your questionnaire in time for us to include it in the survey results, please complete and mail it in the enclosed pre-addressed, postage-paid envelope so we will receive it by **March 19** (or soon thereafter).

Nº 6644

A/R/A

cc1 cc2 cc3

4.7

1 When you kept a diary of your radio listening last spring, you mentioned listening to _____
 Have you listened to this station in the past 30 days? cc8

- Yes — 1
- No — 2

IF YES: Go to question 2. **IF NO:** Please tell us why below:

_____ cc9-10
 _____ cc11-12
 _____ cc13-14
 _____ cc15-16

(When done, skip the following questions and continue with question 12.)

2 Are you listening to this station more or less than you did a year ago? (circle one code only) cc17

- Much more — 1
- Somewhat more — 2
- About the same — 3
- Somewhat less — 4
- Much less — 5
- Not at all — 6
- Don't know — 7

3 In the time since you kept your Arbitron radio diary, would you say that programming on this station has gotten better or worse? (circle one code only) cc18

- Much better — 1
- Somewhat better — 2
- Neither better nor worse — 3
- Somewhat worse — 4
- Much worse — 5
- Don't know — 6

4 How did you first learn of this station? (circle one code only) cc19

- Read advertisement or article about station in newspaper — 1
- Tuned in to station while searching for something to listen to on the radio — 2
- Saw advertisement or feature about it on TV — 3
- A friend or relative told me about it — 4
- Saw billboard or bus card for it while driving — 5
- Other — 6
- Don't remember — 7

5 In what year did you start listening to this station? _____ cc20-21

Please indicate how much you agree or disagree with each of the following statements by circling the number that comes closest to how you feel. (circle one code only)

	DISAGREE			AGREE			
	STRONGLY	MOSTLY	SOMEWHAT	SOMEWHAT	MOSTLY	STRONGLY	
6 This station is important to many people. It is an asset to the community.	1	2	3	4	5	6	cc22
7 The programming on this station is an important part of my life. I would miss it if it were to go away.	1	2	3	4	5	6	cc23

This station is a public radio station. Public stations differ from other stations in that they are non-commercial — they do not make money by selling commercials.

Even though they cannot advertise on public radio, businesses often support public radio programming through grants. Their support is mentioned on the air in the form of short announcements which identify the business as a supporter of public radio.

8 From the following list, please check all organization(s) for which you remember hearing announcements of support on public radio. (circle all that apply)

- American Motors Corporation — 1 cc24
- Cargill Incorporated — 1 cc25
- Chrysler Corporation Fund — 1 cc26
- Control Data Corporation — 1 cc27
- Corporation for Public Broadcasting — 1 cc28
- Digital Equipment Corporation — 1 cc29
- Ford Foundation — 1 cc30
- General Foods Corporation — 1 cc31
- Hewlett Packard — 1 cc32
- Litton Industries — 1 cc33
- Mead Data Central — 1 cc34
- Waste Management, Incorporated — 1 cc35
- None of the above — 1 cc36

9 Is your opinion of a company more positive when you find out it supports public radio? (circle one code only) cc37

- Much more positive — 1
- Somewhat more positive — 2
- Makes no difference — 3
- Don't know — 4

10 Does a company's support of public radio have any positive influence on your decision to purchase that company's products or services? cc38

- No influence — 1
- Slight influence — 2
- Some influence — 3
- A good deal of influence — 4
- Not sure — 5

11 Why do you think businesses support public radio programming? (Please indicate how much you agree or disagree with the following statements. Please circle one number for each item.)

	DISAGREE			AGREE			
	STRONGLY	MOSTLY	SOMEWHAT	SOMEWHAT	MOSTLY	STRONGLY	
a. They want to make a charitable contribution in the public interest.	1	2	3	4	5	6	cc39
b. They want more people to be aware of their existence and corporate identity.	1	2	3	4	5	6	cc40
c. They want to positively influence people's attitudes towards their company.	1	2	3	4	5	6	cc41
d. They want listeners to purchase their products or services.	1	2	3	4	5	6	cc42
e. They want to influence the station's programming.	1	2	3	4	5	6	cc43
f. They want to control what is said about them on the station.	1	2	3	4	5	6	cc44

Public radio programming is also financially supported by its listeners. The next three questions deal with this financial support by listeners. (Your answers will not be used by any party to solicit contributions.)

12 Regarding the above-mentioned public radio station reported in your Arbitron diary:

- a. Have you or has anyone in your household ever given money to this public radio station? cc45
- Yes — 1
No — 2
Don't know — 3

IF NO or DON'T KNOW: Go to question 13.
IF YES: Continue with b.

- b. When was the most recent contribution made? cc46
- Within the last 12 months — 1
Over 12 months ago — 2

- c. In the year of your most recent contribution, which of the following categories best describes the total amount contributed or pledged for that year? cc47
- | | |
|--------------------|------------------------------------|
| Less than \$25 — 1 | \$250 to \$499 — 5 |
| \$25 to \$59 — 2 | \$500 or more — 6 |
| \$60 to \$119 — 3 | Do not remember/
Don't know — 7 |
| \$120 to \$249 — 4 | |

Please indicate how much you agree or disagree with each of the following statements by circling the number that comes closest to how you feel. (Please circle one number for each item.)

	DISAGREE			AGREE			
	STRONGLY MOSTLY	SOMEWHAT		SOMEWHAT	MOSTLY	STRONGLY	
13 Advertisements on radio and television cause people to buy products they don't need	1	2	3	4	5	6	cc48
14 Companies which advertise on radio and television are providing the public with useful information about their products and services	1	2	3	4	5	6	cc49
15 Companies which advertise on radio and TV have too much influence on the programming	1	2	3	4	5	6	cc50

We are interested in your attitudes about a number of issues. There are no right or wrong answers. Please indicate how much you agree or disagree with each of the following statements by circling the number that comes closest to how you feel. (Please circle one number for each item.)

	DISAGREE			AGREE			
	STRONGLY MOSTLY	SOMEWHAT		SOMEWHAT	MOSTLY	STRONGLY	
16 What I do at work is more important to me than the money I earn	1	2	3	4	5	6	cc51
17 Just as the Bible says, the world literally was created in six days	1	2	3	4	5	6	cc52
18 The free enterprise system may not be perfect, but it's better than any other system	1	2	3	4	5	6	cc53

	DISAGREE			AGREE			
	STRONGLY MOSTLY	SOMEWHAT		SOMEWHAT	MOSTLY	STRONGLY	

19 There's too much power concentrated in the hands of a few large companies	1	2	3	4	5	6	cc54
20 I am a born-again Christian	1	2	3	4	5	6	cc55
21 The purchase and use of marijuana should be legalized	1	2	3	4	5	6	cc56
22 Communists should be prohibited from running for mayor of this city	1	2	3	4	5	6	cc57
23 Military service should be required for all young American men	1	2	3	4	5	6	cc58
24 Women should take care of running their homes and leave running the country up to men	1	2	3	4	5	6	cc59
25 I like to think I'm a bit of a swinger	1	2	3	4	5	6	cc60
26 I would rather spend a quiet evening at home than go out to a party	1	2	3	4	5	6	cc61
27 The federal government should encourage prayers in public schools	1	2	3	4	5	6	cc62
28 Federal funding of abortions should be prohibited	1	2	3	4	5	6	cc63
29 A woman's life is fulfilled only if she can provide a happy home for her family	1	2	3	4	5	6	cc64
30 There is too much sex on television today	1	2	3	4	5	6	cc65
31 My world seems to be coming apart at the seams	1	2	3	4	5	6	cc66
32 Most politicians are bought off by some private interest	1	2	3	4	5	6	cc67
33 Members of the American Nazi party should be prohibited from running for mayor of this city	1	2	3	4	5	6	cc68
34 I feel I get a raw deal out of life	1	2	3	4	5	6	cc69
35 The military draft can be justified only when our nation is facing an immediate threat to its safety	1	2	3	4	5	6	cc70
36 I like to be outrageous	1	2	3	4	5	6	cc71
37 Pornographic movie theaters and book stores should be closed down	1	2	3	4	5	6	cc72

38 If you were asked to use one of the following terms to describe your social class, which would you choose? (circle one code only) cc73

- | | |
|------------------------|------------------------|
| Lower class — 1 | Upper-middle class — 4 |
| Lower-middle class — 2 | Upper class — 5 |
| Middle class — 3 | |

39 In terms of your political outlook, do you usually think of yourself as: (circle one code only) cc74

- | | |
|---------------------------|----------------------|
| Very conservative — 1 | Somewhat liberal — 4 |
| Somewhat conservative — 2 | Very liberal — 5 |
| Middle of the road — 3 | |

The following background information questions are included only to help us interpret your responses on other questions. Your responses here and throughout the questionnaire will be held strictly confidential.

40 What is your marital status? cc75

- | |
|----------------------------------|
| Married — 1 |
| Living together, not married — 2 |
| Divorced or separated — 3 |
| Widowed — 4 |
| Single, never married — 5 |

41 What is your current age? cc76

- | | | |
|-----------|-----------|----------------|
| 18-24 — 1 | 30-34 — 3 | 55-64 — 6 |
| 25-29 — 2 | 35-44 — 4 | 65 or over — 7 |
| | 45-54 — 5 | |

42 Please indicate your sex. cc77

- | | |
|----------|------------|
| Male — 1 | Female — 2 |
|----------|------------|

43 Please indicate the category that best describes yourself. (circle one code only) cc78

- | | |
|----------------------|-----------------|
| Cuban — 1 | Black — 5 |
| Mexican-American — 2 | Asian — 6 |
| Puerto Rican — 3 | White — 7 |
| Other Hispanic — 4 | Other _____ — 8 |
- (PLEASE SPECIFY)

44 What is the highest level of formal education you have completed? (circle one code only) cc79

- | |
|---|
| Grade 8 or less — 1 |
| Grades 9-11 — 2 |
| Graduated high school — 3 |
| 1-3 years of college — 4 |
| Graduated college (4 years) — 5 |
| Attended or completed graduate school — 6 |

45 What was your major activity during the last week? (circle one code only) cc80

- | |
|--|
| Working full time (30 hours or more) — 1 |
| Working part time (less than 30 hours) — 2 |
| Have a job but not at work (due to illness, vacation, strike, etc) — 3 |
| Looking for work, unemployed, laid off — 4 |
| Attending school — 5 |
| Retired — 6 |
| Keeping house — 7 |
| Other _____ — 8 |
- (PLEASE DESCRIBE)

46 Which one of the following categories best describes your current occupation? (circle one code only) cc81-82

- | |
|--|
| Professional or technical (e.g., accountant, artist, computer specialist, dentist, engineer, lawyer, librarian, nurse, physician, scientist, teacher, technician, writer, etc.) — 01 |
| Manager or administrator (except on a farm) — 02 |
| Sales worker (e.g., insurance salesperson, realtor, sales clerk, stockbroker, etc.) — 03 |
| Clerical worker (e.g., bank teller, bookkeeper, cashier, office clerk, postal worker, secretary, teacher's aide, telephone operator, etc.) — 04 |
| Craftworker (e.g., baker, carpenter, electrician, foreman, jeweler, mechanic, painter, plumber, tailor, etc.) — 05 |
| Machine operator or laborer (e.g., bus driver, conductor, factory worker, warehouseman, truck driver, carpenter's helper) — 06 |
| Farmer, farm manager, or farm laborer — 07 |
| Service worker or private household worker (e.g., barber, bartender, cook, dental assistant, dishwasher, firefighter, janitor, nursing aide, police officer, usher, waiter, etc.) — 08 |
| Military/armed forces — 09 |
| Homemaker — 10 |
| Student — 11 |
| Retired — 12 |
| Not sure which category (tell us briefly what your job is) — 13 |

IF NOT CURRENTLY EMPLOYED: GO TO QUESTION 48

47 a. In what year did you begin working in your current occupation/profession? _____ cc83-84

b. In what year did you begin working for your current employer in your present position? _____ cc85-86

48 What was your total household income before taxes for the last calendar year (January-December, 1986)?

If you are not married or not living with someone as married, please report your personal income. (Please include income from all sources, including salaries, interest, dividends, bonuses, capital gains, profits, and so on.) (circle one code only) cc87-88

- | | |
|---------------------------|---------------------------|
| Less than \$5,000 — 01 | \$25,000 to \$29,999 — 07 |
| \$5,000 to \$7,499 — 02 | \$30,000 to \$39,999 — 08 |
| \$7,500 to \$9,999 — 03 | \$40,000 to \$49,999 — 09 |
| \$10,000 to \$14,999 — 04 | \$50,000 to \$74,999 — 10 |
| \$15,000 to \$19,999 — 05 | \$75,000 to \$99,999 — 11 |
| \$20,000 to \$24,999 — 06 | \$100,000 or more — 12 |

cc89-cc90

**PLEASE MAIL TODAY
IN THE RETURN ENVELOPE**

Special Surveys
Arbitron Ratings Company
4320 Ammendale Road
Beltsville, Maryland 20705

**THANK YOU FOR HELPING US
WITH THIS SURVEY**

Dear Radio Listener:

Arbitron Ratings is conducting a special in-depth study of people who, like you, mentioned listening to a public radio station in the Arbitron radio diaries kept last spring.

The results of this study will help National Public Radio stations throughout the country improve their programming through better understanding of their listeners.

The enclosed questionnaire will take you only a few minutes to complete. It follows-up on your listening to a particular public radio station and asks about your thinking on some of the ways that such stations get their financial support.

There are also questions about social, political and economic issues. Your answers will help Arbitron profile different groups of listeners who hold common values. We think you will find these questions fun and interesting.

Your response is important to Arbitron in providing the most accurate portrait of the different kinds of people who listen to public radio. You can be certain that the information you give us will be kept in strict confidence.

We would be most grateful if you could take the time right now to fill out this questionnaire. Please answer all the questions and return it to us in the enclosed postage-paid envelope.

Again, thank you for your cooperation. If you have any questions about the questionnaire, please call me collect at (301) 497-4677.

Sincerely,



Jeffrey Barber
Project Director
Arbitron Ratings Company

P.S. The enclosed is only a small token of our very great appreciation of your efforts.

Dear Radio Listener:

A few days ago you should have received a copy of Arbitron's Public Radio Listener Survey. If you have already completed and returned it, we want to thank you for your help. If you have not, please take a few minutes to do so today.

Your participation in this survey is important in providing the most accurate picture of the different kinds of listeners to public radio. If, for some reason, you did not receive your copy, please call (301) 497-4700 collect and a new one will be mailed to you.

Once again, thank you for your participation.



Jeffrey Barber
Project Director

ARBITRON RATINGS

ARBITRON RATINGS
RADIO•TELEVISION•CABLE

The Arbitron Building
Laurel, Maryland 20707

4.

RESPONSE LEVELS

AUDIENCE 88 employs audience segmentation schemes to 1) examine behavioral and attitudinal differences between segments, and 2) to approximate the composition of the audience. Significant response level variations on key variables, not corrected for by re-weighting, place limits on compositional estimates. Appropriate measures maintain the highest degree of integrity throughout all uses of the AUDIENCE 88 data. In interpreting and using the information it is crucial to understand the actual, not the apparent, causes of response bias.

Objectives and Response Bias

AUDIENCE 88's primary objective is to better understand behaviors and attitudes of different types of people in the public radio audience — why they use their public radio station, what they like or dislike about it, why they do or do not contribute, etc. — in order to suggest strategies which better serve these listeners and encourage them to support the service.

The concept of audience segmentation is central to this investigation. By establishing and examining differences among audience segments, AUDIENCE 88 gains insight into critical behaviors and attitudes previously obscured by less focused examinations of the full audience.

This is a valid and entirely appropriate technique which will enhance public radio's ability to serve listeners, to generate support, and to guide policy and planning activities towards their various ends.

Response bias does *not* affect the reliability of this primary objective. It does, however, affect a secondary objective, which is to ascertain the composition of public radio's audience — the relative sizes of demographic, utiligraphic, values, lifestyles, and geodemographic segments. The degree to which response bias affects these composition estimates cannot be computed exactly.

Response bias associated with age and gender has been corrected (see Section 1); to the extent that age and gender are correlated with other demographic, geodemographic, and utiligraphic variables, response bias in these other dimensions is probably minimized. However, because response bias cannot be totally corrected along all dimensions, analysis in AUDIENCE 88 publications adopts two precautionary measures:

1. In all but the *Underwriting* report, emphasis is on the relative *differences* among audience segments — not on their relative *sizes*. Statistical procedures ensure a known and acceptable degree of certainty in these evaluations.
2. In the *Underwriting* report and related materials which do refer to audience composition and the relative sizes of audience segments, the largest practical groupings of smaller segments are used in order to minimize response bias effects. For instance, PRIZM's 12 Social Groups are employed instead of the 40 finest clusters.

The degree of accuracy demanded by the primary objective — where major policy, planning, programming, and other high-stake resource decisions are at risk — is not demanded by potential underwriters. For this reason it is appropriate to use projected estimates of audience composition for underwriting purposes, with the understanding that the study presents the most reliable data possible given the constraints discussed in this section.

THE VALS HYPOTHESIS

Response by Different Groups

Examination of this section's response tables suggests that over-response is associated with higher, and under-response is associated with lower, socio-economic status. It is important to understand the *actual*, not the *apparent*, force at work.

Public radio's audience is heavily comprised of persons characterized by the VALS system as *Societally Conscious* (refer to the AUDIENCE 88 *Terms & Concepts* volume). *Relatively well educated and affluent, Societally Conscious listeners feel a profound sense of social responsibility which, we hypothesize, is the primary underlying force causing over-response on the higher socio-economic measures.*

This hypothesis cannot be tested directly because VALS membership was ascertained in the re-interview study, and is therefore unknown in the beginning sample. There is, however, a substantial body of evidence supporting it.

- Altruism and responsibility are key appeals used in the study's cover letter: "The results of this study will help National Public Radio stations throughout the country improve their programming.... There are also questions about social, political, and economic issues.... Your response is important to Arbitron in providing the most accurate portrait of the different kinds of people who listen to public radio." In hindsight these appeals seem well suited to the personality traits of the Societally Conscious person.
- The re-interview's response rate of 68% is very high compared to similar studies conducted by Arbitron — especially given that nine to twelve months had passed between the time of keeping the Arbitron diary and answering the AUDIENCE 88 questionnaire. While we do not know of any

study demonstrating this, much higher than average willingness to participate in an unobtrusive mail survey asking relatively intrusive questions seems quite consistent with the Societally Conscious personality.

Personality — The Critical Factor

Previous findings of David Giovannoni, published by National Public Radio, demonstrate that *education* is a better predictor of public radio use than other socio-economic variables. Therefore, the higher than average socio-economic status enjoyed by public radio's listeners is *not* what brings them to public radio; people listen because something tied to *education* drives them to seek what public radio offers.

The AUDIENCE 88 study sharpens this point considerably by adding the VALS dimension. It shows that people listen because something in their *personalities* (values, lifestyles) drives them to seek what public radio offers.

Education is highly correlated with the Societally Conscious personality in the same way that socio-economic status is highly correlated with education. And in the same way that previous research showed education to be a better predictor of listening than other socio-economic variables, the AUDIENCE 88 study shows that personality is a better predictor of listening than education. Therefore, well-educated people listen for reasons inherent in their personalities — not because they are well-educated.

Personality — not education or socio-economic status — drives listening to public radio.

And personality — not education or socio-economic status — is almost certainly the cause of response variation seen in Tables 5 through 9.

Adjusting for Response Bias

It is important to keep in mind that the response bias discussed in this section is a bias *among* public radio listeners — not between listeners and non-listeners. All people in the beginning sample listened to public radio; the response variations discussed here do not apply to the U.S. population in general.

Table 4. Response Bias by Demographic, Geodemographic, and Utiligraphic Variables.

Response bias is most severe among the finest geodemographic clusters and age/gender groups. Heavier public radio users also tend to be more cooperative (heavy use is highly correlated with upper socio-economic geodemographic groups.) The *Coding Map* (unpublished) for this project defines the variables.

	<u>Eta-Squared</u>
ClusterPlus ZIP Clusters	.0288
PRIZM Clusters	.0239
Age-Gender	.0183
Station Tune-Ins	.0165
Number of Days Station Used	.0140
PRIZM's Twelve Social Groups	.0123
Claritas' PRIZM Types	.0114
ClusterPlus Cluster Groups	.0081
Station TSL	.0070
Weekpart in Which Station Used	.0070
Location at Which Station Used	.0065
Station Duration	.0046
Market Rank	.0030
Percent of Radio TSL to Station	.0023
Station Used Dominantly	.0021
Gender	.0000
Station Used Exclusively	.0000

Response bias can only be assessed for variables known for the beginning sample. No comparisons can be made between the returned and the beginning sample for variables ascertained in the re-interview survey, such as VALS categorization and education, because the variable is simply unknown for the beginning sample.

The test statistic used on Table 4 is eta-squared. Derived from a crosstabulation of response versus each independent variable, the statistic is interpreted as the proportion of the total variability in the dependent variable (response) that can be accounted for by knowing the values of the independent variable. In this way eta-squared is similar to Pearson's R-squared; key differences, however, are that eta-squared is asymmetric, and does not assume a linear relationship between the variables.

In its calculations, Table 4 employs only Arbitron's original PPDV weighting; the age and gender re-weighting discussed in Section 1 is not in effect. It appears that age and gender are not as close as ClusterPlus and PRIZM to the forces apparently associated with response bias.

Response also appears to be associated with various utiligraphic measures. The station tune-in (occasions) variable — shown in the "Cheap-90" study and subsequent analyses to be the best known indicator of station support and personal importance — is also associated with response variation. The other most significant utiligraphics are tied directly to tune-ins, which explain their rise to the top.

Tables 5 through 9 show returns for individual ClusterPlus and PRIZM schemes — again using data weighted only by PPDV. The severity of response bias is indicated by the adjusted (standardized) chi-squared residual.

Table 5. Response Bias of ClusterPlus ZIP Groups. The contributions of each ClusterPlus ZIP group to the beginning and responding samples are listed from the most over-responding group to the most under-responding group, as indicated by the standardized adjusted chi-square residual. The sub-sample of persons returning complete and usable questionnaires is biased on this dimension. For instance, Z01 is the most over-responding group, comprising 5.1 percent of all respondents, compared with 2.3 percent of all persons in the beginning sample. The most non-respondents are in the ethnic-urban ZIPs.

	Percent of Beginning Sample	Percent of Responding Sample	Adjusted Chi-Square Residual
Z01 Top Income, Well Educated, Professionals, Prestige Homes	2.3	5.1	5.4
Z27 Average Income, Older, Low Mobility, Rural Areas, Old Homes	0.4	1.0	2.8
Z22 Young, Small Town Families with Fewer Children	0.5	1.1	2.5
Z43 Older, Low Mobility, Blue Collar Worker Families, Children	0.0	0.3	2.4
Z14 Younger, Urban, White Collar Workers, Homes Built in 60s	3.0	4.1	2.2
Z31 Average Income, Blue Collar Workers, Homeowners, Rural	0.3	0.6	1.9
Z15 Older, Urban, White Collar Workers, Singles, Few Children	3.7	4.7	1.8
Z23 Average Income and Education, Small Towns, Central Region	1.9	2.6	1.6
Z44 Poorly Educated, Rural, Blue Collar Families, Children	0.0	0.1	1.4
Z06 Younger, Mobile, Homeowners, Working Couples, Children	3.5	4.1	1.3
Z02 Mobile Professionals, New Homes and Condos, Children	2.2	2.7	1.3
Z08 Young, Mobile, White Collar Workers, New Homes and Condos	1.3	1.7	1.3
Z03 Mature Professionals, Established Communities	4.1	4.7	1.2
Z17 Well Educated, Young, Singles, Apartments, Few Children	3.5	4.1	1.1
Z32 Old, Small Town Homeowners, Retirees, Mobile Homes	1.1	1.3	0.9
Z34 Average Income, Blue Collar, Manufacturing Areas, Southeast	0.5	0.6	0.8
Z25 Below Average Income, Singles, Fewer Children, Older Homes	3.8	4.2	0.7
Z41 Older, Low Mobility, Blue Collar Homeowners, Rural Areas	0.1	0.2	0.7
Z35 Very Low Income, Singles, Urban Ethnic Apartment Areas	4.2	4.5	0.5
Z05 Well Educated, Urban, Mobile, Professional, Few Children	3.9	4.2	0.5
Z42 Younger, Unskilled Minorities, Children, Western Region	0.2	0.2	0.4
Z12 Older, White Collar Workers, Fewer Children, Northeast	4.0	4.1	0.3
Z04 High Income, Working Couples, Homeowners, Children	3.2	3.4	0.3
Z36 Average Income, Ethnic Families, Children, Western Region	0.3	0.3	0.3
Z13 Average Educated, Married Couples, Children, Homeowners	2.5	2.5	0.1
Z20 Young, Mobile, Families with Children, New Homes	1.3	1.3	0.1
Z24 Blue Collar Homeowners, Children, Rural Central Region	0.8	0.8	0.0
Z18 Average Income, Older Homes, Low Mobility, Industrial Areas	3.4	3.3	-0.1
Z26 Average Income, Smaller Homes, Mobile Homes, Rural Areas	0.4	0.4	-0.1
Z37 Average Educated Singles, Old Housing, Urb. Apartment Areas	3.4	3.3	-0.2
Z30 Older, Low Mobility, West Central Farm Areas, Old Homes	0.2	0.2	-0.3
Z09 Young, Mobile, Married Couples, Children, New Homes	1.5	1.3	-0.5
Z38 Low Income Retirees, Older Housing, Rural Areas	0.2	0.1	-0.5
Z21 Mobile, White Collar Workers, Above Average Home Value	1.2	1.1	-0.6
Z10 Younger, Mobile, White Collar Workers, Homes Built in 60s	3.6	3.3	-0.8
Z40 Less Educated, Urban, Singles, Apartments, Old Housing	2.8	2.4	-1.0
Z11 Mobile, White Collar Workers, Above Average Home Value	3.3	2.8	-1.2
Z33 Average Income, Small Town, Blue Collar Workers	0.5	0.3	-1.2
Z29 Older, Smaller Single Family Homes, Fewer Children	0.9	0.6	-1.3
Z39 Average Income, Older, Low Mobility, Blue Collar Workers	1.3	0.8	-1.7
Z47 Poorly Educated, Unskilled, Rural, Southern Blacks	0.1	0.0	-1.7
Z07 Apartments and Condos, High Rent, Singles, Professionals	5.5	4.4	-1.8
Z19 Younger, Mobile, Urban, Ethnic, Singles, Few Children	4.6	3.5	-2.1
Z45 Unskilled, Urban Blacks, Apartments, Older Housing	3.8	2.5	-2.8
Z16 Younger, Mobile, Ethnic, High Home Values, Urban Areas	3.0	1.8	-3.3
Z28 Above Average Income, Younger, Black Families with Children	1.7	0.6	-4.0
Z46 Lowest Income, Urban Minorities, Singles, Apartments	6.2	2.5	-7.4

Table 6. Response Bias of ClusterPlus Cluster Groups. The contributions of each ClusterPlus cluster group to the beginning and responding samples are listed from the most over-responding group to the most under-responding group, as indicated by the standardized adjusted chi-square residual. As with the finer ZIP groups, the sub-sample of persons returning complete and usable questionnaires is biased on this dimension. For instance, G01 is the most over-responding group, comprising 15.9 percent of all respondents, compared with 11.8 percent of all persons in the beginning sample. The most non-respondents are found in cluster group G09.

		Percent of Beginning Sample	Percent of Responding Sample	Adjusted Chi-Square Residual
G01	Well Educated, Affluent, Suburban Professional	11.8	15.9	4.5
G10	Less Educated, Downscale, Rural, Families with Children	0.6	1.0	1.8
G07	Average Income, Blue Collar, Families, Rural Areas	2.7	3.0	0.8
G03	Younger, Mobile, Upscale Families, Children, New Homes	8.6	9.0	0.5
G05	Middle Age, Above Average Income, White Collar Workers	12.6	12.8	0.3
G02	Urban, Upscale, Professional, Few Children	13.0	13.2	0.2
G08	Older, Lower Income, Rural Areas, Old Homes	4.0	4.1	0.2
G06	Younger, Mobile, Singles, Few Children, Urban Areas	18.2	17.5	-0.6
G04	Young, Mobile, Above Average Income, White Collar Workers	14.4	13.9	-0.6
G09	Downscale, Ethnic, Urban Apartment Areas, Old Housing	4.2	9.4	-5.7

Table 7. Response Bias of PRIZM Clusters. The contributions of each PRIZM cluster group to the beginning and responding samples are listed from the most over-responding group to the most under-responding group, as indicated by the standardized adjusted chi-square residual. The sub-sample of persons returning complete and usable questionnaires is biased on this dimension. For instance, cluster 5 — Furs & Station Wagons — is the most over-responding group, comprising 7.7 percent of all respondents, compared with 5.4 percent of all persons in the beginning sample.

		Percent of Beginning Sample	Percent of Responding Sample	Adjusted Chi-Sq. Residual			Percent of Beginning Sample	Percent of Responding Sample	Adjusted Chi-Sq. Residual
5	Furs & Station Wagons	5.4	7.7	3.4	30	Blue-Chip Blues	4.9	4.9	-0.1
7	Pools & Patios	4.6	6.5	3.0	4	Heavy Industry	1.8	1.7	-0.1
27	Levittown, USA	2.9	4.4	2.9	2	Rank & File	1.6	1.5	-0.1
12	Towns & Gowns	0.8	1.6	2.7	10	Back-Country Folks	0.7	0.7	-0.2
21	Urban Gold Coast	0.9	1.6	2.6	20	Young Influentials	7.1	7.0	-0.3
19	Shotguns & Pickups	0.9	1.5	2.3	23	New Beginnings	4.4	4.3	-0.3
1	God's Country	3.4	4.3	1.8	3	New Melting Pot	2.6	2.4	-0.4
24	Young Suburbia	6.0	6.7	1.1	17	New Homesteaders	1.8	1.6	-0.5
8	Money & Brains	2.9	3.5	1.1	31	Black Enterprise	1.7	1.5	-0.5
39	Gray Power	3.4	3.9	1.0	35	Grain Belt	0.4	0.4	-0.5
15	Tobacco Roads	0.0	0.1	1.0	36	Old Yankee Rows	2.3	2.1	-0.7
33	Golden Ponds	1.5	1.8	0.9	38	Share Croppers	0.5	0.3	-1.2
34	Agri-Business	1.0	1.2	0.7	18	Smalltown Downtown	2.0	1.6	-1.4
13	Norma Rae-Ville	0.3	0.4	0.6	37	Bohemian Mix	4.7	3.9	-1.6
28	Blue Blood Estates	3.3	3.6	0.5	9	Hispanic Mix	1.6	0.9	-2.3
29	Coalburg & Corntown	1.0	1.2	0.5	26	Single City Blues	6.2	4.6	-2.7
22	Mines & Mills	0.9	1.0	0.2	25	Two More Rungs	2.6	1.4	-3.3
16	Middle America	2.0	2.0	0.1	32	Public Assistance	3.2	1.6	-4.1
40	Blue-Collar Nursery	0.8	0.8	0.1	11	Downtown Dixie-Style	3.0	1.3	-4.8
6	Hard Scrabble	0.0	0.1	0.0	14	Emergent Minorities	4.0	1.9	-5.1

Table 8. Response Bias of PRIZM Social Groups. The contributions of each PRIZM social group to the beginning and responding samples are listed from the most over-responding group to the most under-responding group, as indicated by the standardized adjusted chi-square residual. The sub-sample of persons returning complete and usable questionnaires is biased on this dimension. For instance, S1 is the most over-responding group, comprising 14.8 percent of all respondents, compared with 11.7 percent of all persons in the beginning sample.

	Percent of Beginning Sample	Percent of Responding Sample	Adjusted Chi-Square Residual
S1 Educated Affluent Executives & Professionals In Elite Metro Suburbs	11.7	14.8	3.3
S4 Middle-Class Post-Child Families In Aging Suburbs & Retirement Areas	7.9	9.8	2.6
T1 Educated Young Mobile Families In Exurban Satellites & Boom Towns	5.9	7.4	2.3
R1 Rural Towns & Villages Amidst Farms & Ranches Across Agrarian Mid-US	2.3	3.1	1.8
S3 Upper-Middle Child-Raising Families In Outlying Owner-Occupied Suburbs	10.9	11.6	0.8
S2 Pre & Post-Child Families & Singles In Upscale White-Collar Suburbs	14.4	14.9	0.6
T2 Mid-Scale Child-Raising Blue-Collar Families In Remote Suburbs & Towns	3.8	4.0	0.4
T3 Mixed Gentry & Blue-Collar Labor In Low-Mid Rustic Mill & Factory Towns	4.7	4.7	-0.1
U1 Educated White-Collar Singles & Couples In Upscale Urban Areas	11.7	11.3	-0.4
R2 Landowners Migrants & Rustics In Poor Rural Towns, Farms & Uplands	1.3	1.1	-0.7
U2 Mid-Scale Families, Singles & Elders In Dense Urban Row & Hi-Rise Areas	15.1	10.9	-4.8
U3 Mixed Unskilled Service & Labor In Aging Urban Row & Hi-Rise Areas	9.5	5.5	-5.9

Table 9. Response Bias of PRIZM Types. The contributions of each PRIZM type to the beginning and responding samples are listed from the most over-responding group to the most under-responding group, as indicated by the standardized adjusted chi-square residual. The sub-sample of persons returning complete and usable questionnaires is biased on this dimension. For instance, Affluentials make up the most over-responding group, comprising 31.3 percent of all respondents, compared with 26.9 percent of all persons in the beginning sample.

	Percent of Beginning Sample	Percent of Responding Sample	Adjusted Chi-Square Residual
1 Affluentials	26.9	31.3	3.6
2 Greenbelt Family	16.8	19.0	2.2
4 Satellite Blues	8.2	8.9	0.9
3 Urban Gentry	23.6	24.0	0.4
5 Country Folk	4.0	4.1	0.1
6 Inner City	19.7	12.0	-8.2

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AUDIENCE 88 **Terms and Concepts**

*by David Giovannoni, Linda K. Liebold,
Thomas J. Thomas, and Theresa R. Clifford
(26 pages)*

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Terms & Concepts

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A COMPREHENSIVE ANALYSIS
OF PUBLIC RADIO LISTENERS

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OVERVIEW

All of the AUDIENCE 88 reports use audience analysis techniques which are likely to be new to most public radio professionals. This reference handbook is included as part of the series to introduce these techniques, known as geodemographic and lifestyle segmentation, and to review the key elements of each.

Audience Segmentation

The common theme of AUDIENCE 88 is audience segmentation. The essential notion is to divide the overall audience into several groups, each of which shares something in common. This segmentation, in turn, supports several kinds of analysis.

For example, by examining the behavior of a specific group within the public radio audience, and the differences between this group and others — how much they listen, to what programming they listen, to what extent they contribute to their station — it is possible to discover patterns that would never be discovered by looking at data for the audience as a whole.

By identifying particular kinds of people that are heavily represented in the public radio audience, and learning more about their values and lifestyles, it is possible to develop new programming and fund-raising efforts that will have a special appeal to such listeners — encouraging them to listen more and to give more. Equally important, if not more so, this knowledge can be used to help stations devise strategies to attract new listeners and supporters.

And because AUDIENCE 88 has used segmentation techniques that are familiar to the business community, it is possible to identify special target groups in the audience that are of most interest to prospective underwriters — and to know with some certainty the specific programming to which they listen.

Basic Approaches

AUDIENCE 88 uses three segmentation schemes: VALS, PRIZM, and ClusterPlus.

VALS, an acronym for Values and Life Styles, looks at Americans from the perspective of sociological and psychological classifications. VALS is built on the premise that a person's values and attitudes are linked to his or her behavior and lifestyle. The system was developed by the Stanford Research Institute, now known as SRI International. Using some thirty demographic and attitudinal criteria, VALS classifies people in nine categories, such as Survivors, Achievers, and Societally Conscious.

PRIZM and ClusterPlus characterize people's lifestyles and buying habits based on their home address. This approach, known as geodemographic segmentation, assumes that "birds of a feather flock together," that people move to neighborhoods of people who share similar cultural backgrounds, perspectives, and circumstances. The neighborhoods, in turn, reinforce similar attitudes and behavior.

In the following chapters, we review these three segmentation approaches and present a brief description of each group within them. Accompanying each of these descriptions is a small bar chart indicating the percentage of the U.S. population and the percentage of the public radio audience that falls within the category. This chart helps identify which groups are especially significant in understanding the public radio audience.

There are two things to look for. First, those groups that constitute a relatively high percentage of the audience are clearly important. Second, watch for groups whose percentage of the audience differs substantially from their percentage of the general public, since the difference highlights aspects of public radio's special appeal — both those who are strongly attracted and those who are not.

1. VALS

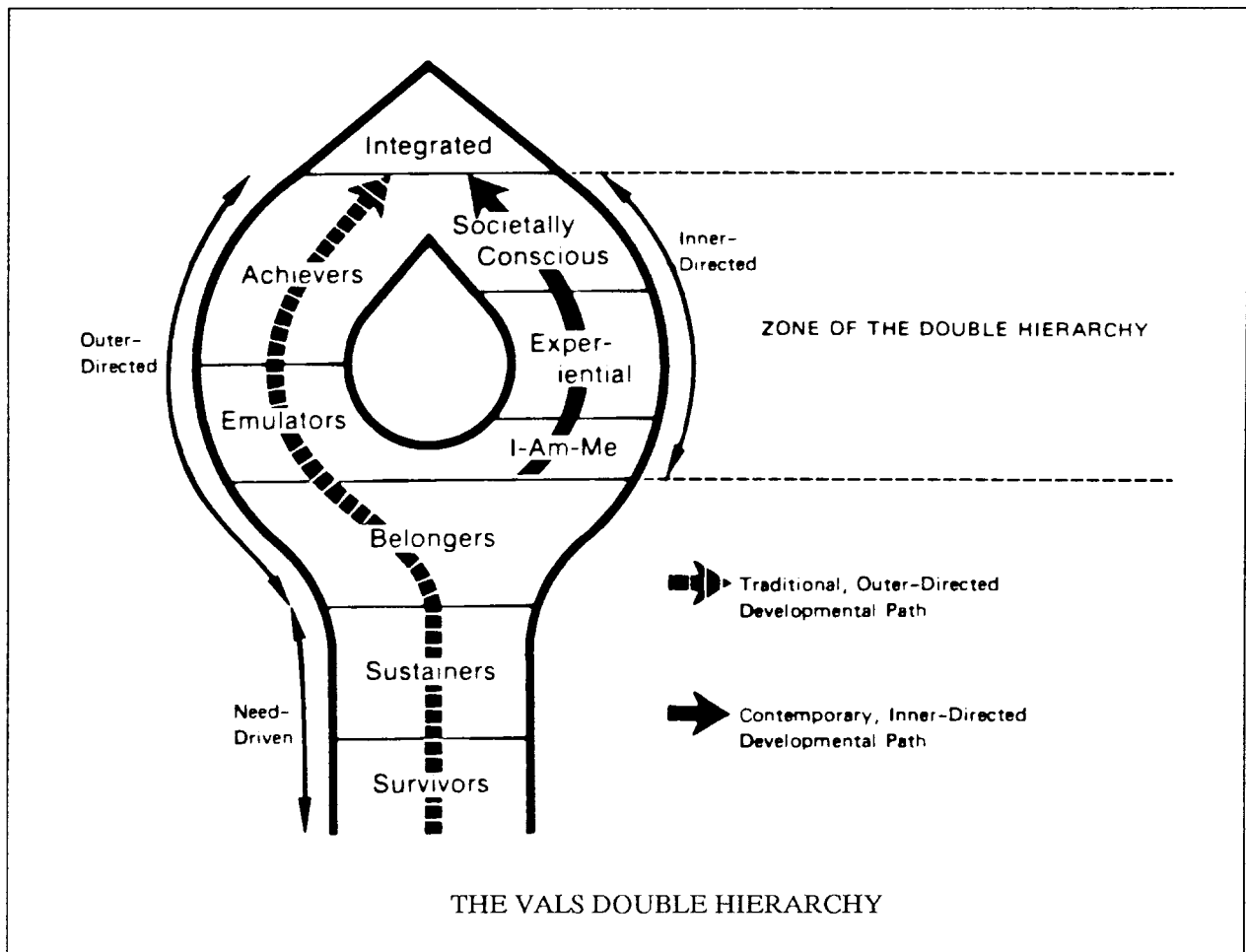
The VALS (Values and Lifestyles) system views people from the perspective of developmental psychology. The hierarchical VALS model holds that development begins from a Need-Driven state, progresses through Outer- and Inner-Directed phases, and culminates in a joining of Outer- and Inner-Direction.

An individual's movement through this hierarchy marks transitions from psychological immaturity to full maturity — the point at which one's potential is fully realized. Maturation involves a steady widening of perspectives and concerns and a steady

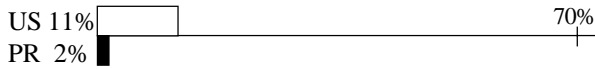
deepening of the inner reference points used in making important decisions.

The VALS system groups people into nine lifestyles, themselves clustered into four major categories. Each of these categories is described on the following pages.

In the bar charts accompanying each category, the top line (US) represents the percentage of the U.S. population that falls in this category. The bottom line (PR) represents the percentage of the public radio audience that falls in this category.

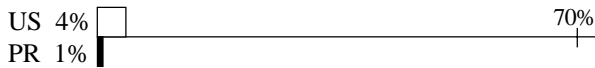


CATEGORY 1: NEED-DRIVENS



Need-Driven people are so limited in resources (especially financial resources) that their lives are motivated more by need than by choice. Values of the Need-Driven center around survival, safety, and security. Such people tend to be distrustful, dependent, and unplanning. The Need-Driven category is divided into two lifestyles: Survivors and Sustainers.

Lifestyle 1: Survivors



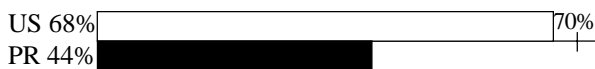
Their extreme poverty, low education, old age, and limited access to upward mobility make Survivors the most disadvantaged in American society. Many, now infirm, once lived lifestyles associated with higher levels of the VALS hierarchy. Others are ensnared in the so-called “culture of poverty.”

Lifestyle 2: Sustainers



Sustainers are better off and younger than Survivors. While struggling at the edge of poverty, many have not given up hope. Their values have advanced from depression and hopelessness to expression of anger at the system, and they have developed a street-wise determination to get ahead.

CATEGORY 2: OUTER-DIRECTEDS

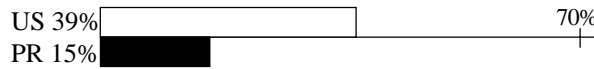


Psychologically, being Outer-Directed is a major step forward from being Need-Driven. Life has broadened to include other people and a host of institutions. Still, Outer-Directeds conduct their lives in response to external signals. Consumption, activities, attitudes — all are guided by what the Outer-Directed individual thinks others will think. Outer-Directeds tend to be the happiest Americans,

being well attuned to the cultural mainstream — indeed, creating much of it.

VALS defines three principal types of outer-directed people: Belongers, Emulators, and Achievers.

Lifestyle 3: Belongers



Belongers constitute the large, solid, comfortable, middle-class group of Americans. They are the main stabilizers of society and the preservers and defenders of the moral status quo. Belongers tend to be conservative, conventional, nostalgic, sentimental, puritanical, and conforming. They strive to fit in — to belong — and not to stand out. Family, church, and tradition are the narrow roads carrying them through their straight and narrow world. Belongers are the people who know what is “right,” and they adhere to the rules.

Lifestyle 4: Emulators



Emulators are a psychological step ahead of Belongers. They have assumed greater personal responsibility for getting ahead instead of drifting with events.

Indeed, Emulators are trying to make it big. They emulate the next more “successful” Achiever lifestyle. In truth, many are not on the Achiever track, but appear not to realize this. Emulators are ambitious, upwardly mobile, status conscious, macho, and competitive. Many see themselves as coming from the other side of the tracks; their ensuing distrust provides little faith that “the system” will give them a fair shake.

Lifestyle 5: Achievers



Competent, self-reliant, and efficient, Achievers tend to be materialistic, hard working, oriented to fame and success, and comfort loving. Achievers include many leaders in business, the professions,

and government. They are affluent people who have created the economic system in response to the American dream. As such, they are the defenders of the economic status quo. Achievers are among the best adjusted of Americans, being well satisfied with their place in the system.

CATEGORY 3: INNER-DIRECTEDS



Inner-Directeds contrast with Outer-Directeds in that they conduct their lives primarily in accord with inner values — the needs and desires private to the individual — rather than in accord with values oriented to externals. Concern with inner growth is a cardinal characteristic.

In American society today, one can hardly be profoundly Inner-Directed without having internalized Outer-Directedness through extensive and deep exposure as a child, adolescent, or adult. Inner-Directed people tend not to come from need-driven or Inner-Directed families. Some measure of satiation with the pleasures of external things seems to be required before a person can believe in or enjoy the less visible, more abstract pleasures of Inner-Direction.

VALS identifies three stages of Inner-Directedness: I-Am-Mes, Experimentals, and Societally Conscious.

Lifestyle 6: I-Am-Mes



I-Am-Me is a short-lived stage of transition from Outer- to Inner-Direction. Values from both stages are much in evidence. The I-Am-Me person is typically young and fiercely individualistic, to the point of being narcissistic and exhibitionistic. People at this stage are full of confusion and emotion they do not understand; hence, they often define themselves better by their actions than by their statements.

Lifestyle 7: Experimentals



I-Am-Mes become Experimentals as they mature psychologically. At this stage of Inner-Direction the focus has widened from the intense I-Am-Me egocentrism to include other people and many social and human issues. Experimentals are people who most want direct experience and vigorous involvement. Life is a light show at one moment and an intense, often mystic, inner experience the next. The most inner-directed of any VALS group, these people are also probably the most artistic and the most passionately involved with others.

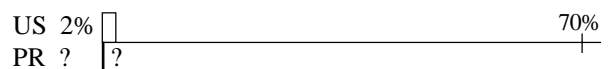
Lifestyle 8: Societally Conscious



The Societally-Conscious have extended their Inner-Direction beyond self and others to society as a whole; to many, society extends to the globe or, in a philosophic sense, the cosmos. A profound sense of societal responsibility leads these people to support such causes as conservation, environmentalism, and consumerism. Activist, impassioned, and knowledgeable about the world around them, many are attracted to simple living and the natural; some have taken up lives of voluntary simplicity.

CATEGORY 4: COMBINED OUTER- AND INNER-DIRECTEDS

Lifestyle 9: Integrateds



At the pinnacle of the VALS typology is a small group of persons who have put it all together. These rare people meld the power of Outer-Direction with the sensitivity of Inner-Direction; hence their name, the Integrateds. Integrateds are fully mature in a psychological sense — able to see many sides of an issue, to lead if necessary, and to take a secondary role when appropriate. They usually possess a deep sense of the fittingness of things.

2.

PRIZM

The PRIZM system is based on the sociological principle that people with similar cultural backgrounds, circumstances, and perspectives cluster in localities suited to their chosen lifestyles. In other words, “birds of a feather flock together;” people with similar cultural backgrounds, means, and perspectives naturally gravitate toward one another. They choose to live amongst their peers in neighborhoods offering affordable advantages and compatible lifestyles.

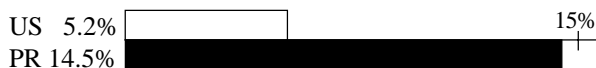
They adopt similar social values, tastes and expectations. They exhibit shared patterns of consumer behavior towards products, services, media and promotions. Such behavior is fundamental, measurable, predictable, and targetable.

The PRIZM system groups people into forty *clusters*, themselves assembled into twelve major *groups*.

In the bar charts accompanying each cluster, the top line (US) represents the percentage of the U.S. population that falls in this cluster. The bottom line (PR) represents the percentage of the public radio audience that falls in this cluster.

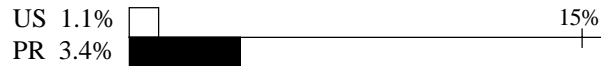
GROUP S1 (SUBURBAN 1)

Educated, Affluent Executives and Professionals in Elite Metro Suburbs



People in Group S1 are characterized by top socioeconomic status, college-plus educations, executive and professional occupations, expensive owner-occupied housing, and conspicuous consumption levels for many products and services. Representing 5% of U.S. households, Group S1 contains about 20% of the nation’s households earning more than \$75,000, and an estimated third of its personal net worth.

Cluster 28: Blue Blood Estates



Blue Blood Estates are America’s wealthiest socioeconomic neighborhoods. They are populated by super-upper established managers, professionals, and heirs to “old money” who are accustomed to privilege and living in luxurious surroundings. One in ten millionaires is found here, and there is a considerable drop from these heights to the next level of affluence.

Cluster 8: Money and Brains



People in Money and Brains neighborhoods live in swank, shipshape townhouses, apartments and condos. Relatively few have children. They are sophisticated consumers of adult luxuries — apparel, restaurants, travel, and the like. Many of these neighborhoods contain private universities and a mix of upscale singles.

Cluster 5: Furs and Station Wagons



Furs and Station Wagons neighborhoods are new and expensive — often built with “new money” — in the greenbelt suburbs of the nation’s major metropolitan areas. These people are well-educated, mobile professionals and managers, with the nation’s highest incidence of teenage children. They are winners — big producers and big spenders.

GROUP S2 (SUBURBAN 2)
Pre- and Post-Child Families and Singles in Upscale, White-Collar Suburbs



Group S2 neighborhoods typify a major U.S. trend towards pre- and post-child communities, with predominant one- and two-person households surrounding closed and half-filled schools. While significantly below Group S1 in socio-economic levels, S2's display the characteristics of success, including high home values, education, income, and white-collar jobs, with consumption levels to match.

Cluster 7: Pools and Patios



Pools and Patios neighborhoods once resembled Furs and Station Wagons neighborhoods: upscale greenbelt suburbs in a late child-rearing mode. But today, the children have grown and departed, leaving aging couples in empty nests too costly for young homemakers. Good educations, high white-collar employment levels, and double incomes assure "the good life" among people living in these areas.

Cluster 25: Two More Rungs



Just behind Pools and Patios in affluence, Two More Rungs neighborhoods have a high concentration of foreign-born European ethnics, are somewhat older, and have even fewer children. Centered in the northeast, these are denser neighborhoods, with a higher incidence of renters in multiple-unit, high-rise housing. Professionals abound, but their spending patterns are somewhat more conservative than others'.

Cluster 20: Young Influentials



Young Influentials are young metropolitan sophisticates with exceptional employment levels in high-

tech and other white-collar industries. They tend to live in the New West, and double incomes are common. There is a high level of discretionary spending, and lifestyles are open, with singles, childless couples, and unrelated adults predominating in expensive, one and two person homes, apartments, and condos. Young influentials can be imagined as tomorrow's Money and Brains.

GROUP S3 (SUBURBAN 3)
Upper-Middle, Child-Raising Families in Outlying, Owner-Occupied Suburbs



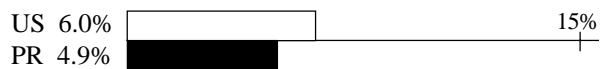
In these outer suburban neighborhoods we find America's traditional family: mom, dad, and the kids. The residents of these upscale neighborhoods are likely to be native-born whites, married, and raising school-aged children. They have double incomes, live in new, single-unit suburban housing which they own themselves, and drive two or more cars.

Cluster 24: Young Suburbia



Young Suburbia neighborhoods are found coast to coast in most major markets. The people living in these neighborhoods tend to be affluent, educated, white-collar married couples with large, young families. As a result they are strong consumers of most family products.

Cluster 30: Blue-Chip Blues



Blue-Chip Blues are similar to Young Suburbia neighborhoods except in social rank. People in these neighborhoods are predominantly high-school educated, employed in blue collar occupations, and live in homes of lesser value. However, their high employment and stable incomes yield discretionary spending patterns that are not all that different from Young Suburbanites.

GROUP U1 (URBAN 1)

Educated, White-Collar Singles and Couples in Upscale, Urban Areas



With minor exceptions for the Black Enterprise cluster, U1 neighborhoods are characterized by millions of young, white-collar singles and mixed couples, dense high-rise housing, upscale socio-economic status, cosmopolitan lifestyles, big city universities and students, many divorced and separated, high concentrations of foreign-born persons. This is where the action is in mega-city America.

Cluster 21: Urban Gold Coast



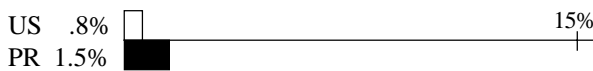
The Urban Gold Coast is altogether unique. It is the most densely populated per square mile, with the highest concentration of one-person households in multi-unit, hi-rise buildings, and the lowest incidence of auto ownership. Other mosts: most employed, most white-collar, most professional, most rented, most childless, and most New York: in short, the ultimate in Urbania.

Cluster 37: Bohemian Mix



If Urban Gold Coast is “the East Side” then Bohemian Mix is “the Village.” These neighborhoods claim as neighbors a largely integrated, singles-dominated, hi-rise hodgepodge of universities, hippies, actors, writers, artists, divorcees, widows, and races. Interestingly, Bohemian Mix neighborhoods are found chiefly in major harbor cities.

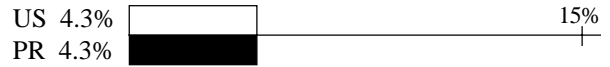
Cluster 31: Black Enterprise



While a few downscale pockets can be found, the majority of people in Black Enterprise neighbor-

hoods are educated, employed, and solidly set in the upper middle class. Black household incomes are well above average, and consumption behaviors match. This is the most family oriented of the U1 clusters.

Cluster 23: New Beginnings



Many New Beginnings neighborhoods have provided homes for a steady flow of young migrants to the South and West in search of new job opportunities and lifestyles. Residents are mostly technical and lower-echelon white-collar workers. Most are 18-34 without children — yet. They are highly mobile, employed, divorced, and rented.

GROUP T1 (TOWNS 1)

Educated, Young, Mobile Families in Exurban Satellites and Boom Towns



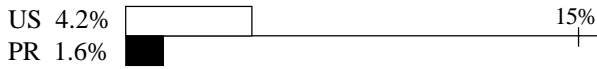
T1s have been the chief recipients of the urban exodus, and are among the nation’s fastest growing areas. Residents tend to be young, native-born, white-collar, extremely mobile adults who live in new, low-density, single-unit housing. T1 neighborhoods are found in younger boom towns and in the satellite towns and exurbs far beyond the beltways of major metropolitan areas.

Cluster 1: God’s Country



The highest socio-economic, white collar neighborhoods outside of SMSAs are located in God’s Country. They are among the nation’s fastest-growing neighborhoods. Residents are well-educated frontier types, who have opted to live away from the big metropolitan areas in some of the most beautiful mountain and coastal areas. Highly mobile, they are heavy consumers of media and products.

Cluster 17: New Homesteaders



A very fast-growing cluster, New Homesteader neighborhoods are very similar to those in God’s Country in their mobility, housing, and family characteristics. The big difference, however, is that the education and affluence of its residents are significantly lower. These areas show peak concentrations of military personnel, and, because of their strong western skew, Hispanics and American Indians.

Cluster 12: Towns and Gowns



Towns and Gowns neighborhoods contain hundreds of mid-scale college and university towns in non-metropolitan America. The population is three-quarters locals (“Towns”) to one-quarter students (“Gowns”). These neighborhoods have high concentrations of 18-24 year old singles and students in group quarters. Very high educational, professional and technical levels contrast with modest incomes and home values. Residents have a taste for prestige products.

GROUP S4 (SUBURBAN 4)

Middle-Class, Post-Child Families in Aging Suburbs and Retirement Areas



While each of the S4 clusters has its own distinct characteristics, all three clusters represent a continuing American trend towards post-child communities. These neighborhoods are home to many aging married couples, widows, and retirees on pensions and Social Security. The residents of S4 suburbia are predominantly white, with significant concentrations of mixed, European-Catholic ancestries. With the exception of Gray Power, they are very much centered in the Northeast.

Cluster 27: Levittown, U.S.A.



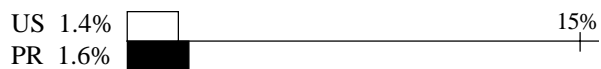
In Levittown, the post-WWII baby boom sparked an explosion of tract housing in the late 40’s and 50’s — brand new suburbs for young white-collar and well-paid blue-collar families. Like Pools and Patios neighborhoods, these babies are now largely grown and gone. Aging couples remain in comfortable, middle-class suburban homes. Employment levels are still high; double incomes are not uncommon, and the living is comfortable.

Cluster 39: Gray Power



Over one million upscale senior citizens who have chosen to pull up their roots and retire among their peers live in Gray Power communities. Primarily concentrated in sunbelt communities of the South Atlantic and Pacific regions, Gray Power residents are the nation’s most affluent elderly. Most are retired and many are widowed. This cluster has the highest concentration of childless married couples, living in mixed multi-units, condos, and mobile homes on non-salaried incomes.

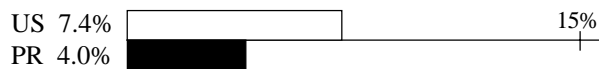
Cluster 2: Rank and File



Rank and File neighborhoods are blue-collar versions of Levittown, U.S.A. Residents are likely to be protective-service and blue-collar workers living in aged duplex row houses and multi-unit “railroad” flats; they lead the nation in durable manufacturing.

GROUP T2 (TOWNS 2)

Mid-Class, Child-Raising, Blue-Collar Families in Remote Suburbs and Towns.



Very middle class, native white, and married, Group T2 neighborhoods might be characterized as Amer-

ica’s blue-collar baby factories. In this way they are blue-collar equivalents to Furs and Station Wagons and Young Suburbia communities. Residents are very likely to have large families, household incomes close to the U.S. mean, and live in their own single-unit houses in factory towns and remote suburbs of industrial metropolitan areas. While anchored in the midwest, T2s are broadly distributed across the nation.

Cluster 40: Blue-Collar Nursery



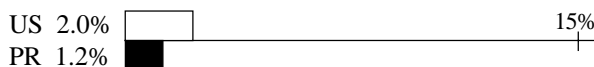
Blue-Collar Nursery neighborhoods are the low-density satellite towns and suburbs of smaller industrial cities. They lead the nation in craftsmen, the elite of the blue-collar world, and in married couples with children. Very well paid and very stable, minority presence is negligible.

Cluster 16: Middle America



Middle American neighborhoods are well-named on several counts. They are composed of mid-sized, middle-class, satellite suburbs and towns. They are at the center of the socio-economic scale, and are close to the national average on most measures of age, ethnicity, household composition, and life cycle. They are also centered in the Great Lakes industrial region, near the population center of the United States.

Cluster 29: Coalburg and Corntown



These neighborhoods fit a popular image of the midwest. Surrounded by rich farmland and populated by solid, blue-collar citizens raising sturdy, Tom-Sawyerish children in decent houses with front porches, they are concentrated in small peaceful cities like Terre Haute, Indiana and Lima, Ohio.

GROUP U2 (URBAN 2)

Mid-Scale Families, Singles and Elders in Dense, Urban Row and Hi-Rise Areas



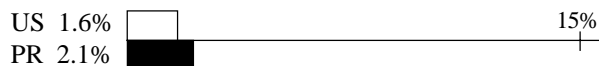
The four clusters in Group U2 encompass dense, urban, middle-class neighborhoods, composed mainly of duplex row houses and multi-unit rented flats. Most of this housing was built over thirty years ago in second-city centers and major market fringes. As a group, the U2 clusters show high concentrations of foreign-born persons, working women, clerical and service occupations, single widows in one-person households, continuing deterioration, and increasing minority presence. Equally significant are their differences.

Cluster 3: New Melting Pot



The original European stock of many old urban neighborhoods has given way to new immigrant populations, often with Hispanic, Asian, and Middle-Eastern origins. These trends have formed a “New Melting Pot,” which includes many “old” melting pot areas, along with new immigrant neighborhoods. As a result, New Melting Pot communities are now situated in the major ports of entry on both East and West coasts.

Cluster 36: Old Yankee Rows



Very similar to New Melting Pot neighborhoods in terms of age, housing mix, family composition, and income, Old Yankee Row communities are dominated by high school educated Catholics of European origin; there are comparatively few minorities. Residents are well-paid blue- or white-collar workers living in the older industrial cities of the northeast. In these neighborhoods girls often go to work after high school, and often live at home until married.

Cluster 14: Emergent Minorities



Emergent Minorities neighborhoods are over two-thirds black; the other one-third is composed largely of Hispanics and other foreign-born minorities. Unlike residents of other U2 clusters, residents in Emergent Minority neighborhoods are more likely than average to have children — over half of which are in homes with single parents. Educational attainment of most residents is below average. The struggle for emergence from poverty is still evident.

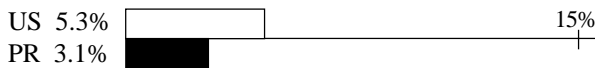
Cluster 26: Single City Blues



Single City Blues neighborhoods are the dense, urban, downscale areas found in most major markets. Many are located near city colleges. Residents are either very well- or very poorly-educated. With very few children, and mixtures of races, classes, transients, and night trades, these communities might aptly be described as poor man's bohemia.

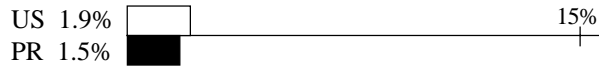
GROUP R1 (RURAL 1)

Rural Towns and Villages Amidst Farms and Ranches Across Agrarian Mid-America



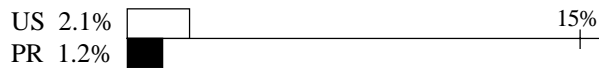
Communities in the R1 clusters stretch in a broad swath across the corn belt, through the wheat fields of the great plains states, and on into ranch and mining country. Their distinguishing traits include sparsely populated communities, lower middle to downscale socio-economic levels, extreme concentration of native-born Americans of German and Scandinavian ancestries, negligible black presence, high incidence of large families headed by married parents, a low incidence of college education, and maximum stability. Residents are well described as “rugged conservatives.”

Cluster 19: Shotguns and Pickups



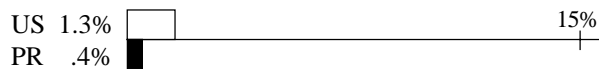
Small, outlying townships and crossroad villages which serve the nation's breadbasket and other rural areas comprise Shotguns and Pickups. More easternly distributed than other R1 inhabitants, residents are likely to live in large families with school-age children, headed by blue-collar craftsmen, operatives, and transport workers with high school educations. They are dedicated outdoorsmen.

Cluster 34: Agri-Business



Clustered in the great plains and mountain states, Agri-Business areas are, in good part, prosperous ranching, farming, lumbering, and mining areas. There is, however, rural poverty here — from the Dakotas to Colorado — where weather-worn old men, and a continuing exodus of young persons, testify to hard living. Mexican braceros and American Indians are likely to speak Spanish.

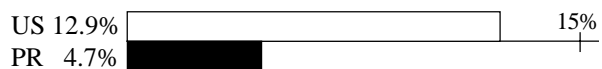
Cluster 35: Grain Belt



A close match to Agri-Business communities on most demographic measures, Grain Belt areas have a much higher concentration of working farm owners and less affluent tenant farmers. The Grain Belt encompasses the nation's most stable and sparsely-populated rural communities, primarily in the great plains and mountain states, and have the highest incidence of farmers in single-family homes.

GROUP T3 (TOWNS 3)

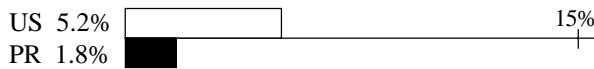
Mixed Gentry and Blue-Collar Labor in Low-Mid Rustic, Mill and Factory Towns



The T3 areas cover a host of predominantly blue-collar neighborhoods in the nation's smaller indus-

trial cities, its factory, mining and mill towns, and rustic coastal villages. Residents tend to earn lower-middle incomes, to be native born of English descendants, to have limited educations, and (except for those in Smalltown Downtown) to live in single units and mobile homes in medium to low density areas.

Cluster 33: Golden Ponds



Hundreds of small, rustic towns and villages in coastal resort, mountain, lake, and valley areas are included in the Golden Ponds cluster. In these areas seniors choose to retire in cottages amongst country neighbors. While not as affluent nor as elderly as Gray Power residents, these people rank high on all measures of independent retirement.

Cluster 22: Mines and Mills



Mines and Mills ranks first in total manufacturing and blue-collar occupations. Industry is still king in these mining and mill towns scattered throughout Appalachia, from New England to the Pennsylvania/Ohio industrial complex and points south. Very few blacks or Hispanics live here.

Cluster 13: Norma Rae-Ville



Norma Rae-Villes are concentrated in the south in the Appalachian and Piedmont regions. They include hundreds of industrial suburbs and mill towns, a great many in textiles and other light industries; they lead the nation in non-durable manufacturing. Residents are country folk with minimum education; they are more likely than other T3s to be black.

Cluster 18: Smalltown Downtown

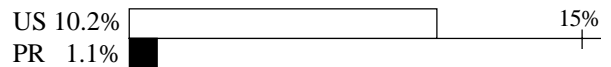


Over a hundred years ago America was laced with railroads and booming with heavy industry. All

along these tracks factory towns sprang up to be filled with laborers in working-class row house neighborhoods. Many can be seen today in Smalltown Downtown communities. This cluster also includes the aging downtown portions of other minor cities and towns. It is unique among the T3s in its relatively high population densities.

GROUP R2 (RURAL 2)

Landowners, Migrants and Rustics in Poor Rural Towns, Farms and Uplands



The communities in Group R2 pepper rural America and blanket the rural south with thousands of small agrarian communities, towns, villages, and hamlets. These areas share such characteristics as very low population densities, large, highly stable households with widowed elders, and high concentrations of mobile homes. Residents are of low socio-economic status with minimal educations employed predominantly in blue-collar or farm occupations. Many are of American Indian or English ancestry.

Cluster 10: Back-Country Folks



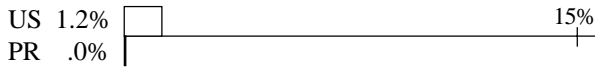
Back-Country Folks live in remote rural towns in the Ozark and Appalachian uplands. They are predominantly white and are highly likely to be of English ancestry. In fact, many are the descendants of original colonial settlers and still speak in the Elizabethan dialect.

Cluster 38: Share Croppers



Share Croppers are found in 48 states, but they are deeply rooted in the south. Traditionally, their communities were devoted to tenant farming, chicken breeding, and pulpwood and paper milling. But sunbelt migration and a ready labor pool have continued to attract light industry and population growth. Blacks and “Cajun” French are found in the Mississippi Valley center of this cluster.

Cluster 15: Tobacco Roads



While found throughout the south from Virginia to Texas, the greatest concentration of Tobacco Roads is seen in the river basins and coastal scrub-pine flatlands of the Carolinas, Georgia, and the Gulf states. Half of their residents are black and a fifth are of English descent. While there is some light industry, Tobacco Roads have the fewest white-collar employees; poor unskilled labor predominates these agricultural communities.

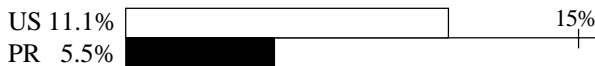
Cluster 6: Hard Scrabble



From an old phrase meaning to scratch a hard living from hard soil, Hard Scrabble communities include the country's poorest rural areas, from Appalachia to the Ozarks, Mexican border country, and Dakota Badlands. Very few blacks live in these areas; residents are likely to be of Mexican and English ancestries, and are even more likely to be American Indians on reservations.

GROUP U3 (URBAN 3)

Mixed, Unskilled Service and Labor in Aging, Urban Row and Hi-Rise Areas



The U3 neighborhoods are the least advantaged in urban America. A resident is very likely to be a minority, minimally-educated, single (widowed, divorced, separated, or never married), a single parent with a large family, a renter of multi-unit housing, and a low income or chronically unemployed operative, service worker, or laborer.

Cluster 4: Heavy Industry



Heavy Industry neighborhoods are much like Rank and File neighborhoods, only significantly down the

socio-economic scale and hard hit by unemployment. Residents are concentrated in the older industrial markets of the northeast, and are very likely Catholic and Hispanic. They have fewer children and many broken homes. These neighborhoods have rapidly aged and deteriorated during the past decade.

Cluster 11: Downtown Dixie-Style



Concentrated in a few dozen southern metropolitan areas, these middle-density urban areas contain both white and black enclaves, the latter replete with black churches and colleges. Half of the residents are black, and many are Hispanics (mostly Puerto Rican). Compared to the other U3 clusters, residents are unique in that they are predominantly native born.

Cluster 9: Hispanic Mix



Representing the nations "barrios," Hispanic Mix areas are chiefly concentrated in the major markets of the mid-Atlantic and the west. Residents are likely to live in dense row house neighborhoods, have large families with small children — many headed by single parents. Hispanic Mix communities rank second in percent of foreign-born, first in short term immigration, and are essentially bilingual neighborhoods.

Cluster 32: Public Assistance



Public Assistance households are 70% black and comprise the "Harlems" of America. These are the nation's poorest neighborhoods with twice its unemployment level and five times its share of public assistance incomes. These communities have been urban-renewal targets for three decades. Residents group in large, solo-parent families in rented, public hi-rise buildings interspersed with aging tenement row houses.

3.

CLUSTERPLUS

The ClusterPlus system, like PRIZM, is based on geodemographic principles. It groups people into forty-seven *clusters*, themselves assembled into twelve major *groups*.

In the bar charts accompanying each cluster, the top line (US) represents the percentage of the U.S. population that falls in this cluster. The bottom line (PR) represents the percentage of the public radio audience that lives within this ZIP Cluster.

GROUP 1

Well Educated, Affluent, Suburban Professional



ZIP Cluster 1

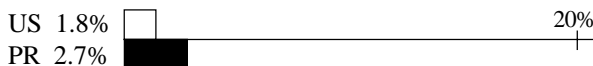
Top Income, Well Educated, Professionals, Prestige Homes



The most established, stable, and exclusive neighborhoods, where children go to private schools, and parents are well educated and employed professionally. They are the most likely to use credit cards, own a home computer, new car, or long-term savings certificate. They travel the most; internationally for pleasure and domestically for business.

ZIP Cluster 2

Mobile Professionals, New Homes and Condos, Children



Highly mobile homeowners with children,

professionally employed, and well educated. They are the most likely to own small cooking appliances, electric hand tools, and three to four year old cars. They are also more likely to purchase new clothes, paperback books and to have recently shopped in a department or discount store.

ZIP Cluster 3

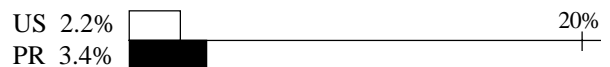
Mature Professionals, Well-Established Communities



High income professionals, well educated, living in large, older homes with few children. Men are the most likely to have bought a sport coat in the last year. Tend to drink wine more than other beverages and more likely to travel to Europe than to other areas.

ZIP Cluster 4

High Income, Working Couples, Homeowners, Children



Well educated homeowners with larger families. Likely consumers of home improvement products such as storm doors or windows, exterior paint, or stain and insulation. Most likely to take a domestic trip to a theme park and buy video electronic games. They tend to drink beer as well as domestic wines, and own a variety of electric appliances from washing machines and hair dryers to power mowers and home computers.

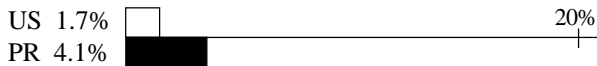
GROUP 2

Urban, Upscale, Professional, Few Children



ZIP Cluster 5

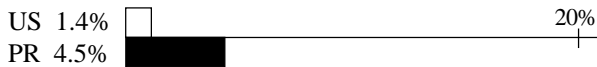
Well Educated, Urban, Mobile, Professional, Few Children



Professionals with few children, living in highly valued condominiums. Heavy travellers for business and pleasure; more likely to visit Mexico than other foreign areas. Frequent purchasers of new clothes, likely to drink wine or imported beer, purchase records and tapes at record stores, and buy paperback books.

ZIP Cluster 7

Apartments and Condos, High Rent, Singles, Professionals



Well educated singles paying high rents or living in highly valued condominiums. Most likely to travel to Europe and attend theatre or concerts. More likely to drink natural spring waters, imported wine, and imported beer. Frequent purchasers of new clothes.

ZIP Cluster 15

Older, Urban, White Collar Workers, Singles, Few Children



Above average in income and education, and living in apartments in older urban areas. Favor imported beer and imported wine over domestic. More likely to buy records and tapes in a record store than from another kind of store or record club. Shop more often in department stores than in discount stores. Frequently purchase new clothes.

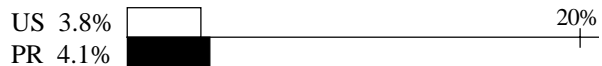
GROUP 3

Younger, Mobile, Upscale Families, Children, New Homes



ZIP Cluster 6

Younger, Mobile Homeowners, Working Couples, Children



High income families with above average education living in new homes. Tend to own sub-compact domestic cars, shop in discount and department stores and take domestic trips to theme parks. More likely to drink soft drinks, diet and non-diet, than other beverages.

ZIP Cluster 9

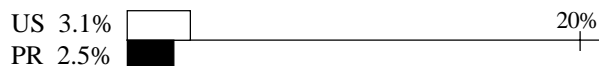
Young, Mobile, Married Couples, Children, New Homes



Large, high income families in new homes. Most likely to own minibikes or motor scooters. Tend to buy records and tapes from record clubs. More likely to drink party wines and soft drinks than other beverages. Own used cars, have personal loans, and buy belted tires.

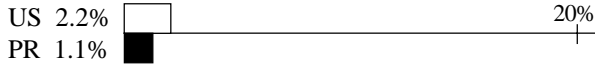
ZIP Cluster 13

Average Educated, Married Couples, Children, Homeowners



Above average income and home values. Most likely to own compact domestic car, major kitchen and laundry appliances. Shop in department and discount stores, belong to record clubs, and are likely to make auto related purchases such as tires, rust-proofing, and auto loans. Frequent purchasers of home improvement products such as storm windows and doors, electric hand tools, fertilizer, and power mowers.

ZIP Cluster 21
Mobile, White Collar Workers, Above Average Home Value

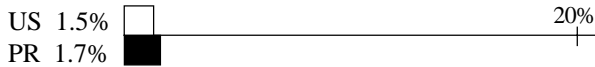


Above average income, larger families. Favor domestic beer and wine over imported. Most likely to own bias ply tires and to drive sub-compact automobiles.

GROUP 4
Young, Mobile, Above Average Income, White Collar Workers



ZIP Cluster 8
Young, Mobile, White Collar Workers, New Homes and Condos



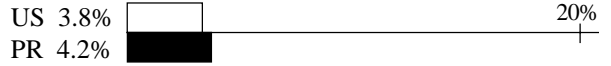
Well educated with above average incomes. Most likely to have IRAs and auto loans. Most likely purchasers of SLR cameras, sneakers, and electric hair dryers. Frequent beer drinkers, favor imported red wine and domestic rose over other wines. Own home video equipment, portable audio gear, and car tape players.

ZIP Cluster 10
Younger, Mobile, White Collar Workers, Homes Built in 60s



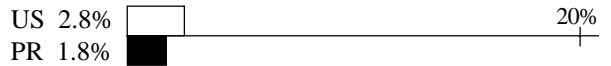
Above average income. Own sub-compact domestic automobiles and electric hair dryers. They are more likely to take domestic trips than foreign trips for vacations. They are more likely to drink wine than beer.

ZIP Cluster 14
Younger, Urban, White Collar Workers, Homes Built in 60s



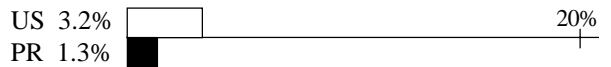
Above average income and education. Tend to shop at discount or department stores. Travel domestically for business, own indoor-outdoor carpeting, and car bought new.

ZIP Cluster 16
Younger, Mobile, Ethnic, High Home Values, Urban Areas



Above average income and education, mostly west coast and ethnic. Heavy travellers, primarily to Hawaii, Mexico, or the Caribbean. More likely to travel abroad than in the U.S. Likely to own recording equipment and stereo components. Own sub-compact car. More likely to drink imported beer than domestic but favor domestic wine.

ZIP Cluster 20
Young, Mobile, Families with Children, New Homes



Above average income. Most likely to own stereo equipment. Own recording equipment, video games, and cameras. Have personal and auto loans, intermediate size cars and favor bias ply tires. Tend to drink domestic beer.

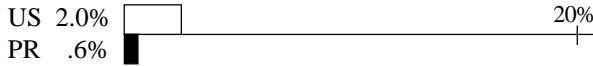
ZIP Cluster 22
Young, Small Town Families with Fewer Children



Average income and education. Own indoor-outdoor carpeting, take domestic business trips, belong to record clubs and are likely to buy steel belted radial tires. More likely to own sub-compact cars.

ZIP Cluster 28

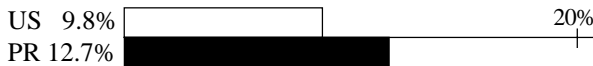
Above Average Income, Younger, Black Families with Children



Average education. Own intermediate size car, bought used. Tend to favor department stores over discount stores. Drink malt liquor and party wines.

GROUP 5

Middle Age, Above Average Income, White Collar Workers



ZIP Cluster 11

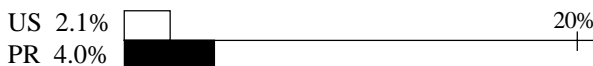
Mobile, White Collar Workers, Above Average Home Value



Above average income and education. More likely to take a foreign trip than travel to a theme park. Tend to own compact and sub-compact cars and buy steel belted radials rather than bias ply tires. Least likely to own a full size car. More likely to buy records or tapes at a record store than at a discount store or record club. Likely to own an SLR camera and home video equipment.

ZIP Cluster 12

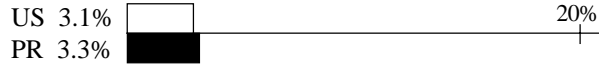
Older, White Collar Workers, Fewer Children, Northeast



Above average income. Low mobility. Likely to have a long-term savings certificate, IRA or Keogh plan, or own credit cards. More likely to drink wine or imported beer than domestic beer.

ZIP Cluster 18

Average Income, Older Homes, Low Mobility, Industrial Areas



Above average income but average education. Most likely to own intermediate size domestic car. Likely to purchase home improvement products such as fertilizer, painting and staining services and appliances such as power mowers and air conditioners. Carry life insurance, own late model cars, and favor beer on tap.

ZIP Cluster 23

Average Income and Education, Small Towns, Central Region



Central region, average home values. Drink domestic beer, particularly on tap. Purchase home improvement products and services such as interior/exterior painting, insulation, and storm windows and doors.

GROUP 6

Younger, Mobile, Singles, Few Children, Urban Areas



ZIP Cluster 17

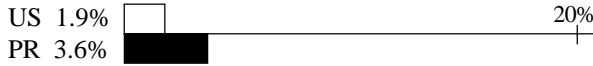
Well Educated, Young, Singles, Apartments, Few Children



Below average income, mobile. Men are the most likely to purchase sneakers. Tend to travel domestically, buy records at record stores or department stores. Own sub-compact cars, probably bought used, and favor bias ply tires over others. Likely to own stereo equipment. Tend to drink imported beer rather than domestic.

ZIP Cluster 19

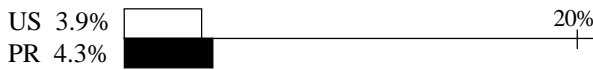
Younger, Mobile, Urban, Ethnic, Singles, Few Children



Average income, above average education, live in apartments primarily in the west. Most likely to drink bottled water and imported beer although often drink other kinds of beer as well. Favor jeans, own car radios and stereo equipment. Purchase records and tapes from record clubs. More likely to travel abroad for pleasure.

ZIP Cluster 25

Below Average Income, Singles, Fewer Children, Older Homes



Average education. More likely to own sub-compact cars, bought used. Less likely to buy bias belted tires than any others. Own recording equipment, favor domestic beer over imported, but tend to drink imported white wine instead of imported red.

ZIP Cluster 37

Average Educated Singles, Old Housing, Urban Apartment Areas



Below average income, few children. Drink soft drinks and party wines. Likely to own compact or full size car.

ZIP Cluster 40

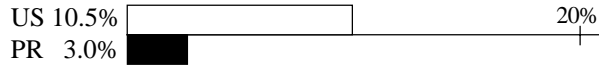
Less Educated, Urban, Singles, Apartments, Old Housing



Northeast, below average income, manufacturing areas. Most likely to own intermediate size car with burglar system, and fiberglass radial tires. Most likely to drink ale and soft drinks. Women frequently purchase clothes.

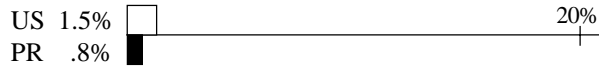
GROUP 7

Average Income, Blue Collar, Families, Rural Areas



ZIP Cluster 24

Blue Collar Homeowners, Children, Rural Central Region



Rural manufacturing areas, above average income. Own full size domestic cars, bought used, minibikes, regular unbiased belted tires, and have auto loans. Drink draft or domestic beer. Own major appliances and recently purchased storm windows, doors, or painting services.

ZIP Cluster 26

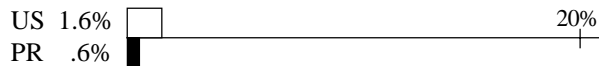
Average Income, Smaller Homes, Mobile Homes, Rural Areas



Travellers, especially to Hawaii and Mexico. Own home video equipment, intermediate size car, bought used with bias ply tires and new shock absorbers. Prefer domestic beer and wine to imported.

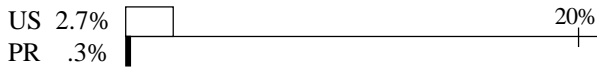
ZIP Cluster 31

Average Income, Blue Collar Workers, Homeowners, Rural



Average education. Most likely to own a sub-compact car, bought used and maintained with recent purchases such as new tires, muffler, battery, and air filter. Likely to buy either bias ply or fiberglass radials. Own small and major appliances. Shop at discount and department stores. Drink diet soft drinks, purchase records from department and discount stores and record clubs. Women regularly buy new clothes.

ZIP Cluster 33
Average Income, Small Town, Blue Collar



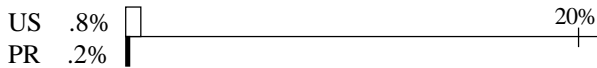
Below average education. Own either intermediate or full size car with fiberglass radial tires. More likely to drink soft drinks than other beverages.

ZIP Cluster 34
Average Income, Blue Collar, Manufacturing Areas, Southeast



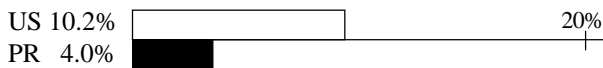
Small towns, single family homes, below average education. Favor soft drinks over other beverages. More likely to shop at discount stores. Own full size car, bought used.

ZIP Cluster 41
Older, Low Mobility, Blue Collar Homeowners, Rural Areas



Below average income and education. Own intermediate or compact car, bought used with loan, recently fitted with belted radial tires and muffler. Own electric hand tools and minibike. Likely to have recently purchased storm windows, inexpensive women's shoes, and records at a department store.

GROUP 8
Older, Lower Income, Rural Areas, Old Homes



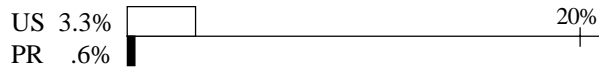
ZIP Cluster 27
Average Income, Older, Low Mobility, Rural Areas, Old Homes



Average income and education. Own a home com-

puter, indoor-outdoor carpeting, video games and life insurance. Own compact domestic car, bought used with bias belted tires, new muffler and shock absorbers. Drink domestic beer, bottled, canned, or on tap. Have recently had painting or insulation work done.

ZIP Cluster 29
Older, Smaller Single Family Homes, Fewer Children



Average income and average education. Own intermediate size car, bought used. Own bias belted tires, drink soft drinks, prefer domestic beer to imported.

ZIP Cluster 30
Older, Low Mobility, West Central Farm Areas, Old Homes



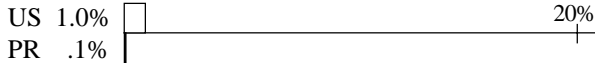
Farmers, below average income, rural. Have, and regularly service, full size or intermediate car with bias ply tires. Purchase home improvement products and services such as insulation, painting, and electric hand tools. Own home computer, minibike and car radio/tape player. Carry health insurance and have long-term savings certificate. Women regularly buy new clothes.

ZIP Cluster 32
Old, Small Town Homeowners, Retirees, Mobile Homes



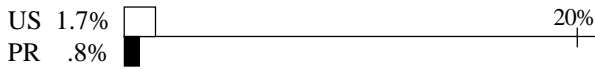
Below average income, newer homes. Own intermediate size car with new battery, shock absorbers, and fiberglass radial tires. Most likely to own indoor-outdoor carpeting. Have stereo and camera equipment. More likely to drink beer than wine. Use insecticides.

ZIP Cluster 38
Low Income Retirees, Older Housing, Rural Areas



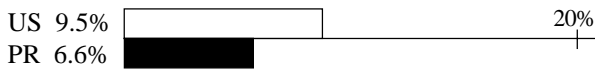
Low mobility, low income, old, few children. Own full size car with recently installed muffler, battery, and air filter. Women most likely to have recently bought a coat. Own home video equipment.

ZIP Cluster 39
Average Income, Older, Low Mobility, Blue Collar Workers

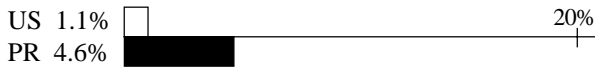


Few children, manufacturing areas, old homes with below average values. Carry life insurance. Likely to own compact car. Shop at department stores.

GROUP 9
Downscale, Ethnic, Urban Apartment Areas, Old Housing

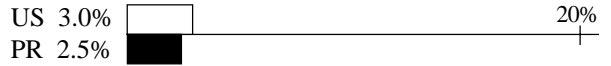


ZIP Cluster 35
Very Low Income, Singles, Urban Ethnic Apartment Areas



Mobile, few children, above average home values. Likely to drink imported beer and domestic or imported wine. Own sub-compact car, bought used. Unlikely to buy tires, own life or medical insurance, or indoor-outdoor carpeting. Likely to travel to Latin America or Caribbean. Drink bottled water. Men purchase jeans and women purchase coats.

ZIP Cluster 45
Unskilled, Urban Blacks, Apartments, Older Housing



Female householders, high unemployment, less educated. Most likely to drink malt liquor. Also favor party wines and soft drinks to other beverages. Buy records and tapes at department stores.

ZIP Cluster 46
Lowest Income, Urban Minorities, Singles, Apartments

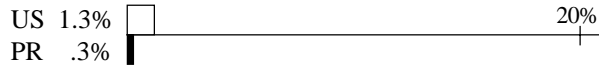


Female householders, blacks, less educated. Likely to drink malt liquor, ale, party wines, and soft drinks. Men are likely purchasers of jeans and sneakers, women buy more expensive shoes and jeans.

GROUP 10
Less Educated, Downscale, Rural, Families with Children



ZIP Cluster 36
Average Income, Ethnic Families, Children, Western Region



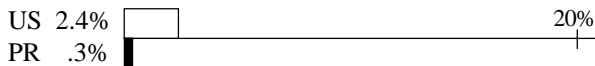
Non-black minorities, small homes. Travel to Mexico, own compact domestic car with bias ply tires. Shop at discount stores for records and other items. Drink soft drinks, unlikely to drink wine.

ZIP Cluster 42
Younger, Unskilled Minorities, Children,
Western Region



Poorly educated, large families, high unemployment, small homes. Own compact car, with recently installed battery. Most likely to have travelled to Mexico in past three years. Purchase records and tapes at a department store, drink lemon-lime soft drinks, unlikely to drink beer or wine.

ZIP Cluster 43
Older, Low Mobility, Blue Collar Worker
Families, Children



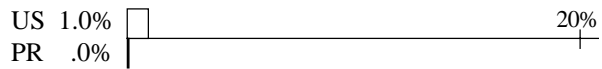
Low income, less-educated, live in manufacturing areas. Much more likely to drink soft drinks than beer or wine. Likely to own full size car, with bias belted tires. Own separate room air conditioners.

ZIP Cluster 44
Poorly Educated, Rural, Blue Collar Families,
Children



Low income, single family homes. Most likely to own separate room air conditioners. Own full size domestic car with fiberglass radial tires and new car battery. Use insecticides. Men are likely to have recently purchased jeans.

ZIP Cluster 47
Poorly Educated, Unskilled, Rural, Southern
Blacks



Low mobility, low income, single family homes. Most likely to drink soft drinks. Also drink malt liquor. Use insecticides. Carry life insurance. Own indoor-outdoor carpeting. Own home video equipment, major kitchen appliances.



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AUDIENCE 88
Underwriting

by Linda K. Liebold
(57 pages)

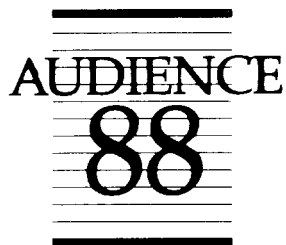
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A COMPREHENSIVE ANALYSIS
OF PUBLIC RADIO LISTENERS

Underwriting

Prepared by:

Linda K. Liebold
Liebold & Associates, Inc.
Annapolis, MD

Funds provided by:
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Linda K. Liebold

Annapolis, MD
January 1988

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UNDERWRITING HIGHLIGHTS

- Public radio listeners are very well educated — two-thirds have college degrees.
- Over half of public radio's listeners are employed in professional, technical, managerial, or administrative positions.
- Almost two-thirds of all public radio listeners live in households with average annual incomes of \$30,000 or greater. One in eight listeners has an annual household income of \$75,000 or more.
- Half of public radio's listeners are between the ages of 25 and 44; men are slightly more likely than women to listen to public radio in an average week.
- Four in 10 public radio listeners live in affluent suburban neighborhoods. Another one in 10 lives in an upper income urban neighborhood.
- Eighty percent of public radio's listeners hold a more positive image of companies that support public radio.
- Seventy percent of public radio's listeners say that a company's support of public radio has a positive influence on their decision to purchase that company's products and services.

OVERVIEW

Businesses and corporations support public radio for three major reasons. First, *businesses view their support as a contribution to their community*. Just as they support a local arts group or the United Way, they see underwriting as a way to help provide a quality service to their community — and a way to enrich the quality of life around them.

Second, *companies support public radio to augment their public relations programs*. Businesses know that by underwriting public radio programming they can enhance their image in the community — and among their employees and shareholders. They can build goodwill for their organization by demonstrating, on the air, their support of a quality institution.

Third, *companies see underwriting as a parallel to advertising* — a cost-effective way to put their company name and product on the air and reach an audience of well-educated, professional, and affluent consumers.

This report addresses the underwriting benefits that will appeal to each type of underwriter — and each reason for underwriting. By properly using the data provided, underwriting representatives will be able to develop stronger, more powerful, and effective solicitation strategies that, in turn, should increase support from businesses and corporations.

To best assist stations in their underwriting efforts, this report is divided into four major sections. Section 1 is an explanation of the “goodwill/good image” public relations benefits of supporting public radio. It shows — with firsthand data — that underwriting is indeed good public relations. It proves that listeners think well of a business that supports public radio and are positively influenced to purchase an underwriter’s products and services.

Section 2 describes public radio’s audience in terms of demographics, geodemographics, and values and lifestyles — data that will help stations build a case for underwriting as a way to reach a targeted group of consumers. Whether a company wishes either to enhance its image or to place its name and product before a well-educated, affluent group of consumers, the audience data in this section will help stations do it.

Section 3 is a case study, demonstrating how AUDIENCE 88 data can be applied in prospecting and underwriting presentation efforts. Step by step, using information from this report and the AUDIENCE 88 companion handbook, *Terms & Concepts*, the case study explains how to analyze the audience of a particular format, determine the most appropriate companies to call on, and develop an effective solicitation strategy to use in an underwriting presentation.

Finally, Section 4 provides demographic, geodemographic, and values and lifestyles data for use in soliciting underwriting for specific public radio formats and programs. Whether stations are promoting their information, classical music, jazz, or opera programming; *All Things Considered*; *Morning Edition*; *Weekend Edition*; or *A Prairie Home Companion*; this section offers valuable information for use in developing prospecting and underwriting strategies for these particular formats and programs.¹

¹ The four formats and four programs studied in this report are widely carried and listened to. The sample of surveyed stations did not report enough of any other programming to provide statistically sound results.

TERMS TO KNOW

To gain the most from this report, it is important to understand some basic terms defined below. For more specific information on PRIZM, ClusterPlus, and VALS, see the AUDIENCE 88 Terms & Concepts handbook.

Demographics: Measures of *who listeners are*; age, gender, education, occupation, income, and other personally descriptive measures.

Geodemographics: Measures of *where listeners live*; their neighborhood type according to PRIZM or ClusterPlus definitions.

Utiligraphics: Measures of *how listeners listen* to public radio and to radio in general.

Psychographics: Measures of *what listeners think*; interests, opinions, values, attitudes, beliefs, lifestyles, personality traits, etc. Based on psychological, as distinguished from demographic, dimensions.

Lifestyles: Measures of *how listeners live*; broad measures include sophistication and venturesomeness; specific measures include purchasing habits, inclination to set or follow trends, and predisposition to try new products and services.

Values: Basic attitudes and beliefs.

PRIZM: A geodemographic approach to consumer market segmentation invented by Claritas, Washington, DC. All U.S. neighborhoods are classified into 40 neighborhood types according to their similarities over precise census measures.

ClusterPlus: A geodemographic approach to consumer market segmentation developed by Donnelley Marketing Information Services, Stamford, CT. All U.S. neighborhoods are classified into 47 neighborhood types according to their similarities over precise census measures.

VALS (Values and Lifestyles): Developed by Stanford Research Institute, Menlo Park, CA, VALS segments persons into nine distinct types that reflect basic attitudes and beliefs.

Inner-Directed: A VALS term describing people who conduct their lives in accord with inner values — the needs and desires private to the individual — rather than in accord with the values of others.

Outer-Directed: A VALS term describing people who conduct their lives in response to external signals. Consumption, activities, attitudes — all are guided by what the Outer-Directed individual thinks others will think.

Societally Conscious: The Inner-Directed VALS type most associated with public radio. Forty-two percent of public radio listeners are Societally Conscious. They have a profound sense of societal responsibility. Their concerns extend beyond themselves and others to society as a whole.

Achievers: One of the Outer-Directed VALS types. Twenty-six percent of public radio listeners are Achievers. They are competent, self-reliant, hard working, and oriented to fame and success. They are affluent people who strongly influence the economic system in response to the American Dream.

Experientials: Another Inner-Directed VALS type. Nine percent of the public radio audience are Experientials. They are people who want direct experience and vigorous involvement. They are artistic and the most passionately involved with others.

1.

UNDERWRITING IS GOOD PUBLIC RELATIONS

Underwriting is an excellent public relations vehicle for businesses and corporations. Public radio station professionals have been telling businesses that when they underwrite a program on public radio, listeners will remember their company name, think positively about their company, and appreciate the fact that their company supports public radio.

Some underwriting representatives have been brave enough to say that listeners will buy or use a company's products or services *because* the company supports public radio. And many have told prospective underwriters that by supporting such a quality

- Eighty percent of public radio listeners say their opinion of a company is more positive when they discover the company supports public radio.
- Eighty-five percent of public radio listeners think businesses that support public radio programming do so because they want to make a charitable contribution in the public interest.
- Seventy percent of public radio listeners say that a company's support of public radio has a positive influence on their decision to purchase that company's products and services.

Listeners think well of businesses that support public radio. In fact, listeners attribute altruistic motives to corporate support. Most important, listeners support businesses that support public radio.

And because such a large percentage of public radio's listeners are well educated, hold professional

institution, they will foster good relations with their employees and shareholders.

While public broadcasters have always felt these claims to be true, there have been no hard data to substantiate these statements — until now. The AUDIENCE 88 study provides public radio professionals with the tools to corroborate these claims.

The AUDIENCE 88 study asked questions addressing the goodwill/good image of underwriting public radio. The findings substantiate that public radio is indeed an excellent public relations vehicle.

and managerial jobs, have high incomes, and primarily live in affluent neighborhoods, underwriting offers companies an extraordinary opportunity to reach these listeners with a positive message.

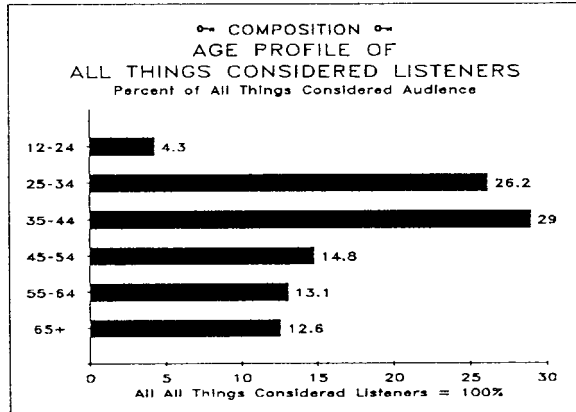
The jury is in: Underwriting is a very effective public relations tool.

CRITICAL CONCEPTS

Three major concepts are used throughout this report to describe the public radio audience: **index**, **reach**, and **composition**. Each is described and graphically demonstrated below the way it is used in this report.

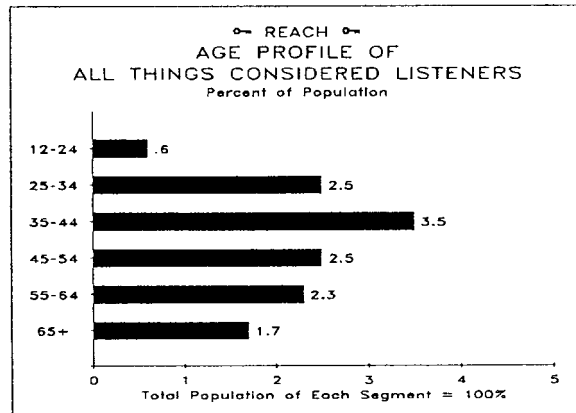
Composition: The percentage of a format's or program's cume listeners who are in a particular audience segment.

All Things Considered's 35-44 composition of 29 is interpreted as follows: Twenty-nine percent of *All Things Considered* listeners are between the ages of 35 and 44 years old.



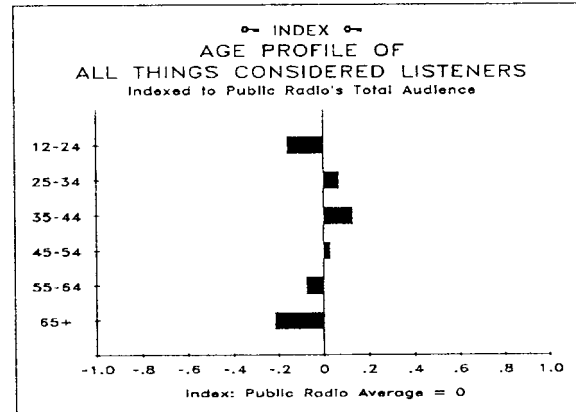
Reach: The percentage of the U.S. population in a particular audience segment listening to a format or program for at least 5 minutes in a week. Reach is the same as *cume rating* or *penetration*.

All Things Considered's 35-44 reach of 3.5 is interpreted as follows: Three and one-half percent of all Americans between the ages of 35 and 44 years old listen to *All Things Considered* each week.



Index: The likelihood of a format's or program's cume listeners being in a particular audience segment in comparison with a larger group of persons — typically all public radio listeners or all persons living in the United States.

All Things Considered's 35-44 index of .13 is interpreted as follows: Compared with other public radio listeners, *All Things Considered* listeners are 13% more likely to be between the ages of 35 and 44 years old.



2.

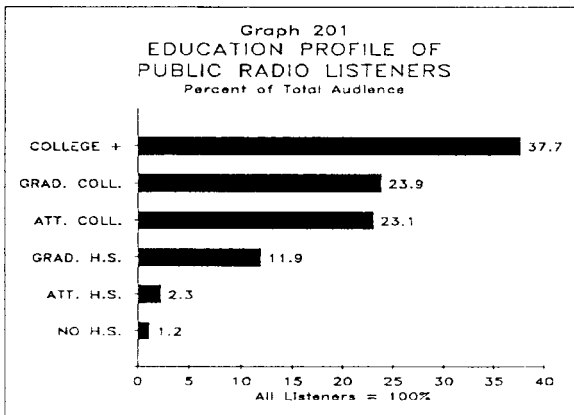
PUBLIC RADIO'S EXCEPTIONAL AUDIENCE

Public radio is sitting on a demographic gold mine. With their college degrees and corresponding high incomes, public radio listeners are very attractive to underwriters. Most are professionals and managers, live in affluent neighborhoods, and are acutely concerned about their society. The following pages make the case for public radio's exceptional reach into an educated, upscale audience. This report offers valuable information that can be used to describe the public radio 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.

Demographics of the Public Radio Listener

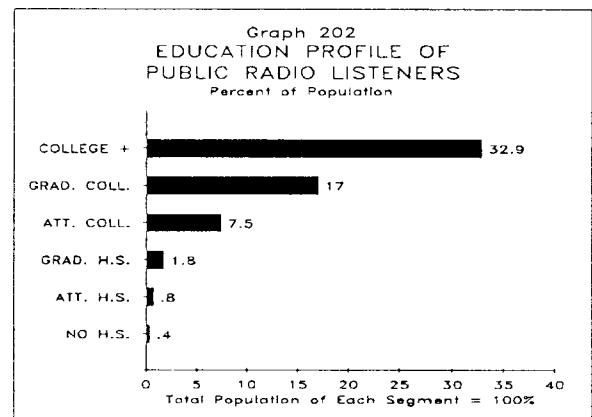
Education is the one characteristic that distinguishes public radio listeners from other Americans.

You are at a party. You meet a man who listens to public radio. The odds are better than six in 10 that this person is a college graduate — 62% of public radio listeners have degrees.

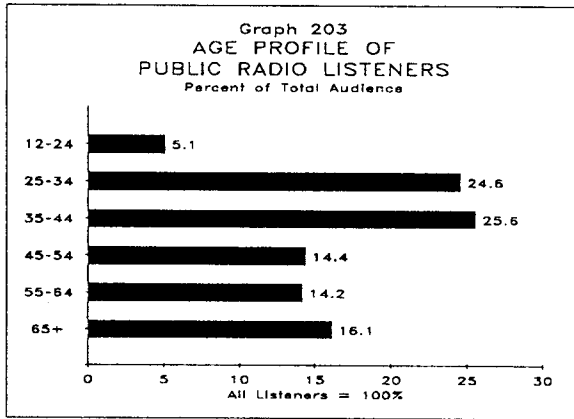


Not only do many public radio listeners have college degrees, but many college graduates also listen to public radio each week. Public radio's reach into the educated population is high. While fewer than 6% of all Americans listen to public radio in a

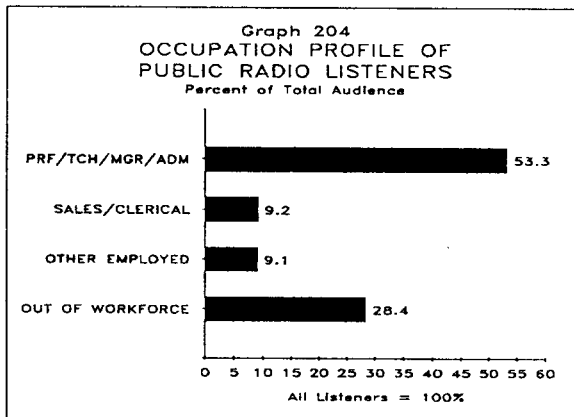
week, one-third (33%) of those who have pursued an education beyond college use the service each week.



Education is a pervasive demographic; its effects correlate with many other demographic characteristics of the audience. There are more men than women college graduates in our society, and the data show that men are slightly more likely than women to listen to public radio. Similarly, the youngest and oldest Americans are not as well educated as those in the middle, and we see public radio's listeners highly concentrated in the 25- to 64-year-old range. More specifically, as you can see from Graph 203 on the next page, half (50%) of the audience is between the ages of 25 and 44.

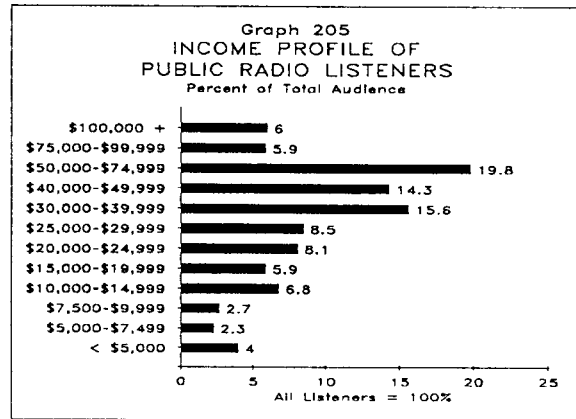


Education affects occupation. Most likely that man you met at the party, being a highly educated person, has a white-collar job. Although one in four (28%) public radio listeners is not in the work force — students, mothers with children at home, and retirees, for example — over half (53%) are employed in professional, technical, managerial, or administrative positions.

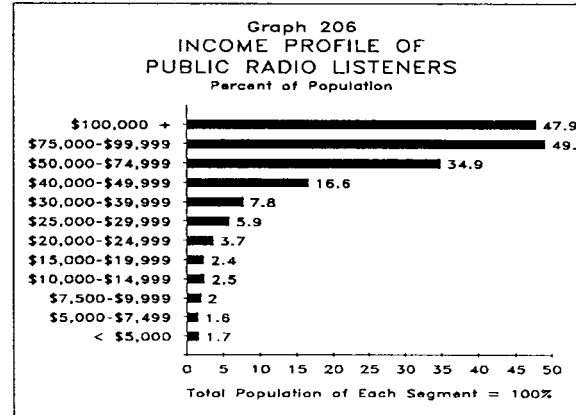


With such well-paying white-collar careers, it comes as no surprise most public radio listeners are financially well-off. Remember the public radio listener you met at the party? There is a six in 10 chance (62%) he lives in a household with an annual income greater than \$30,000.

In fact, one in eight (12%) public radio listeners lives in a household with an income of \$75,000 or more.



And, half (49%) of all persons in the United States living in these high-income (\$75,000+) households listen to public radio each week. That's quite a reach!



As you can see, a majority of public radio listeners are well-educated, professional, affluent consumers — the kind of people many businesses and corporations want to reach.

By reading further you will learn how the affluence of public radio's well-educated audience is also reflected in its geodemographics, values and lifestyles.

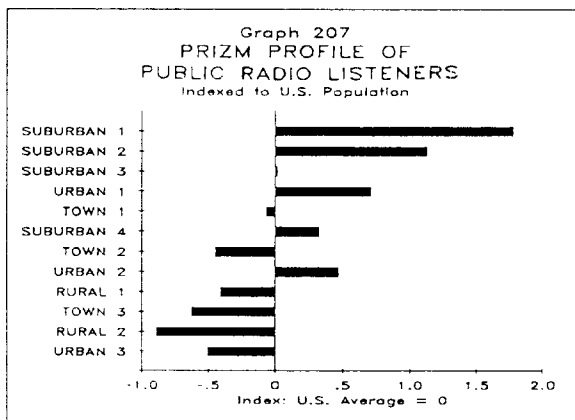
Geodemographics of the Public Radio Listener

Imagine the kinds of neighborhoods in which public radio listeners reside. In fact, think about that person you met at the party. He probably lives in a neighborhood where other well-educated, professional, and affluent people like himself reside.

Based on the premise that “birds of a feather flock together,” people with similar cultural backgrounds, means, and perspectives naturally gravitate toward one another. They choose to live amongst their peers in neighborhoods offering affordable advantages and compatible lifestyles. They exhibit shared patterns of consumer behavior toward products, services, media, and promotions. Because their behavior is measurable, predictable, and targetable, geodemographic data can help build a case for business/corporate support. (See Section 3 of this report.)

If you refer to the AUDIENCE 88 *Terms & Concepts* handbook, you will see how the geodemographic systems of PRIZM and ClusterPlus divide America into *types* of neighborhoods. PRIZM and ClusterPlus are similar geodemographic tools. For demonstration purposes here, PRIZM will be used; refer to the AUDIENCE 88 *Terms & Concepts* handbook for specific ClusterPlus information.

Back to your friend at the party. Most likely he lives in an upscale suburban neighborhood. In fact, as a public radio listener, he is more than twice as likely as are other Americans to live in affluent suburbia.

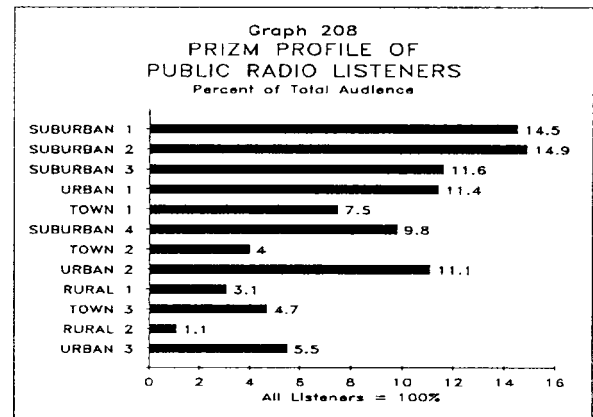


Suburban 1 (S1) Neighborhoods

If your new friend attended graduate school, has an executive or professional occupation, lives in an expensive home, and has a relatively high household income, he may live in a *Suburban 1 (S1)* neighborhood. *Fifteen percent of public radio listeners reside in S1 neighborhoods.*

PRIZM identifies three types of these posh suburban (S1) neighborhoods.

On the one hand, if your friend is an heir of “old money” and is a “super-upper” and an established manager or professional, he most likely lives in the *S1 Blue Blood Estates* neighborhood. *Three percent of public radio listeners live in Blue Blood Estates neighborhoods* as compared to only 1% of the total U.S. population.



On the other hand, if he lives in a swank townhouse, apartment, or condominium with few — perhaps no — children, he may live in an *S1 Money and Brains* neighborhood. *Another 3% of public radio listeners reside in Money and Brains neighborhoods* as compared to 1% of all Americans.

If, instead, this listener lives in an expensive, new neighborhood — perhaps in the greenbelt suburb of a major metro, built with “new money” — and has teenage children, he most likely lives in an *S1 Furs and Station Wagons* neighborhood. *More than twice as many public radio listeners live in this type of neighborhood than in the previous two mentioned. In fact, 8% of public radio listeners live in Furs and Station Wagons neighborhoods* as compared to only 3% of all Americans.

Suburban 2 (S2) Neighborhoods

If he is not quite that affluent — but is still well-off — he may live in a *Suburban 2 (S2)* neighborhood. These are often one- and two-person households surrounding closed and half-filled schools. *Fifteen percent of all public radio listeners reside in S2 neighborhoods.* In fact, those who live in these suburban neighborhoods are more than twice as likely to listen to public radio than other people.

If this public radio listener has a good education, a top-level white-collar job, and children who have grown up and left home, he may live in an *S2 Pools and Patios* neighborhood. *Seven percent of public radio's listeners live in Pools and Patios neighborhoods* as compared to 3% of all Americans.

Let's say this listener is a young metropolitan sophisticate, with exceptional employment in a high-tech or other white collar industry. He is probably single, married without children, or living with an unrelated adult. He most likely lives in a one- or two-person home, apartment, or condominium in an *S2 Young Influentials* neighborhood. *Seven percent of public radio's listeners live in Young Influentials neighborhoods* as compared to 3% of all Americans.

Suburban 3 (S3) Neighborhoods

If this listener is a family man, has school-aged children, has a double income, lives in a new single-unit suburban house that he owns, and drives two or more cars, he may live in a *Suburban 3 (S3)* neighborhood. *Twelve percent of the public radio audience reside in S3 neighborhoods* — about the same percentage as in the total U.S. population.

If this listener is young, is affluent, has a white-collar job, plus is married and has young children, he most likely lives in an *S3 Young Suburbia* neighborhood. *Seven percent of public radio's listeners reside in Young Suburbia neighborhoods* as compared to 5% of the total U.S. population.

Urban 1 (U1) Neighborhoods

Of course, public radio listeners live in cities, too. If your listener is young, is perhaps foreign-born, has a white-collar job, lives in dense high-rise

housing in a major university city, is socioeconomically upscale, has a cosmopolitan lifestyle, and is divorced or separated, it's likely he lives in an *Urban 1 (U1)* neighborhood. *Eleven percent of all public radio listeners reside in U1 neighborhoods* as compared to 7% of all Americans.

If he lives in a rented one-person apartment in a multi-unit high-rise building in New York, doesn't own a car, and has no children, he probably resides in a *U1 Urban Gold Coast* neighborhood. *Two percent of all public radio listeners reside in Urban Gold Coast neighborhoods* as compared to only .5% of the total U.S. population.

If he lives in a highly integrated, singles-dominated neighborhood; is perhaps a minority, an "ex-hippie," an actor, a writer, or an artist, and is divorced or widowed, he may live in a *U1 Bohemian Mix* neighborhood. *Four percent of public radio's listeners live in Bohemian Mix neighborhoods* as compared to 1% of all Americans.

But if he is black, well-educated, employed, and set solidly in the upper middle class, he probably lives in a *U1 Black Enterprise* neighborhood. *Almost 2% of the public radio audience reside in Black Enterprise neighborhoods* as compared to less than 1% of all Americans.

If he is young (18 to 34 years old), has no children, has just migrated to the South or West, and is searching for new job opportunities and lifestyles, he probably lives in a *U1 New Beginnings* neighborhood. *A little over 4% of public radio's audience consist of people living in New Beginnings neighborhoods* — about the same percentage as those living in the United States.

Summary

More than four in 10 (41%) public radio listeners live in the top three socioeconomic suburban neighborhoods defined by PRIZM. Another 11% live in upper income urban settings.

That makes sense. You would assume people with good educations, high incomes, and professional occupations to live in affluent suburbs and upscale city neighborhoods. But what would you presume about these listeners' attitudes and beliefs?

Values and Lifestyles of the Public Radio Listener

Let's return to the listener at the party. What is he really like? What does he believe in? What does he like to do? What is he most likely to buy?

VALS (Values and Lifestyles) data help answer these questions. (See the AUDIENCE 88 Terms &

Concepts handbook for more detailed information.) The VALS system views people from the perspective of developmental psychology. The hierarchical VALS model states that psychological development begins from a *Need-Driven* state, progresses through *Outer* and *Inner-Directed* phases, and culminates in an *Integrated* state — a joining of Outer- and Inner-Direction. The VALS “tulip” illustrates this progression.

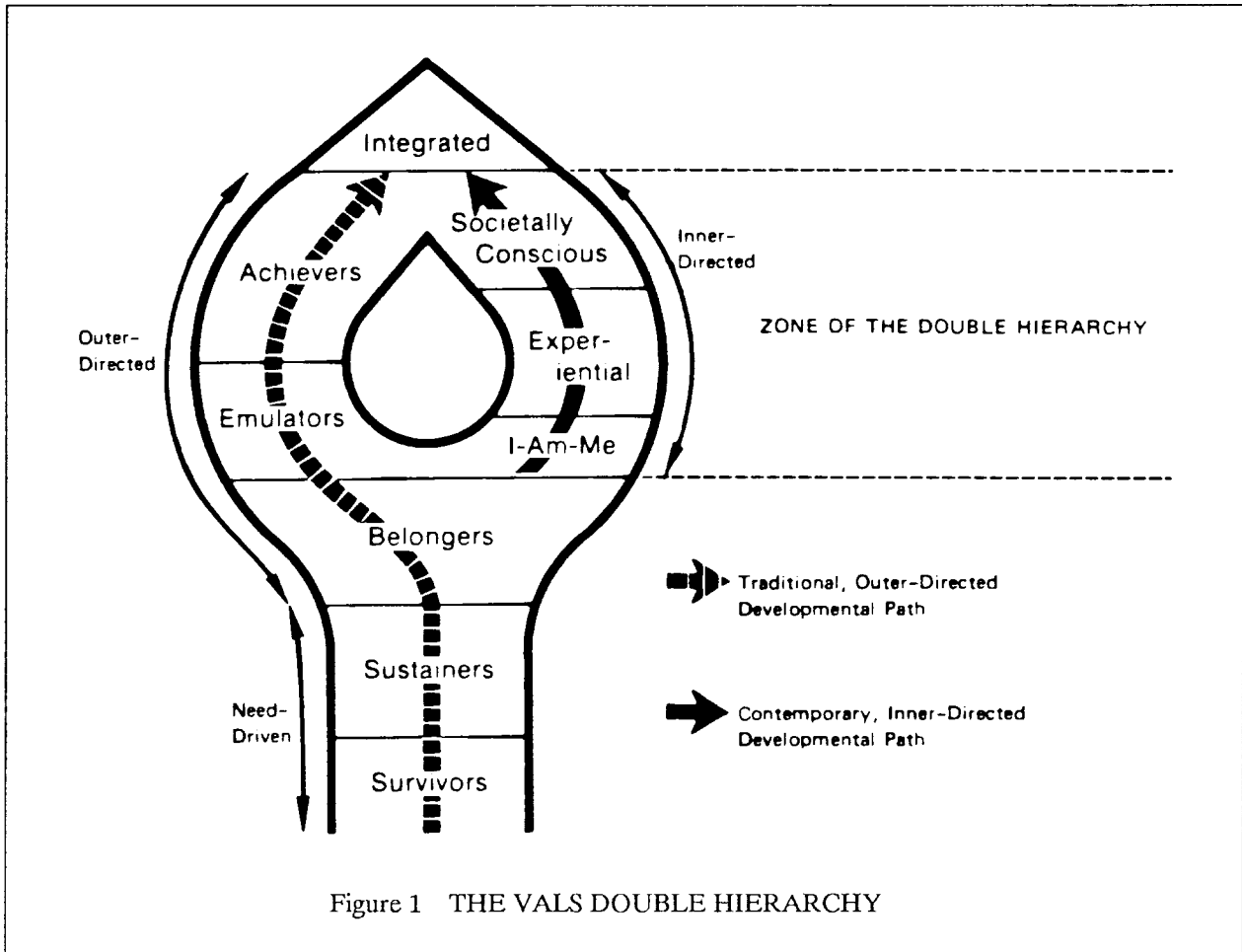


Figure 1 THE VALS DOUBLE HIERARCHY

This theory holds that an individual's movement through this hierarchy marks transitions from psychological immaturity to full maturity — the point at which one's potential is fully realized. Maturation involves both a steady widening of perspectives and concerns and a steady deepening of the inner reference points used in making important decisions.

The VALS system groups people into nine lifestyles clustered into four major categories (Need-Driven,

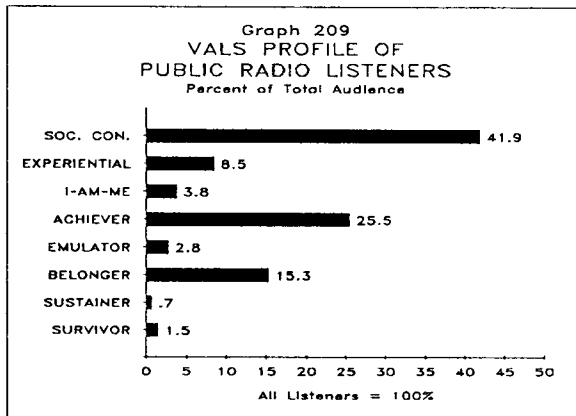
Outer-Directed, Inner-Directed, and Integrated). As mentioned earlier, many public radio listeners are well educated and therefore have good incomes and good jobs. But not all educated people are alike. VALS helps to distinguish them.

On the one hand, the educated listeners who are Inner-Directed conduct their lives in accord with their inner values. They are concerned with inner growth. Listeners who are Inner-Directed tend to be the *Societally Conscious* and *Experimentals*.

On the other hand, those educated listeners who are Outer-Directed live their lives in response to external signals. They are guided by what others will think. Public radio listeners who are Outer-Directed tend to be *Achievers*.

Societally Conscious

The Inner-Directed Societally Conscious make up the largest group of public radio listeners. *Forty-two percent of public radio listeners are Societally Conscious* as compared to only 12% of all Americans. There is a good chance the listener you met at the party is Societally Conscious, extending beyond himself and others to society as a whole.



He probably has a profound sense of social responsibility and supports such causes as environmentalism and consumerism. He may be an activist who is impassioned and knowledgeable about the world around him. He may be attracted to simple living.

Being Societally Conscious, he probably participates in the arts and attends cultural events. He may travel often — for business and pleasure — and use travel agencies and rental cars. It is likely that he has credit cards, checking accounts, mutual and money market funds, and life and health insurance.

He probably enjoys outdoor sports and activities — cycling, jogging, swimming, boating, and camping. He may enjoy intellectual games such as Chess and Backgammon. He is apt to read a lot.

Concerned with energy conservation, he most likely owns a subcompact vehicle. He probably enjoys the finer things in life and is often the first to

purchase sophisticated electronic equipment.

This listener may not watch much TV, but when he does, it's often public television. He spends less time than others listening to the radio, too, but when he does listen, 41% of the time he is tuned to public radio.

Experientials

Another Inner-Directed group of individuals, *Experientials*, also listen to public radio. Although they only represent 6% of the total U.S. population, *9% of the public radio audience are Experientials*.

In a way, *Experientials* can be thought of as young, less mature, *Societally Conscious* individuals. They want direct experience and vigorous involvement. The most Inner-Directed of any VALS group, these people are also probably the most artistic and the most passionately involved with others.

Experientials spend more time listening to the radio than do *Societally Conscious* persons, but only 30% of this time is spent tuned to public radio.

Can you see how the *Societally Conscious* and *Experientials* are drawn to public radio? Their interest in the arts and culture plus their tendency to travel and experience life make them prime candidates for most of public radio's programming. Their concern about society and the world around them draws them particularly to public radio news and information programming.

Achievers

Experientials and *Societally Conscious* listeners compose the Inner-Directed contingent of public radio's audience. *Achievers* are these listeners' Outer-Directed counterparts.

One in five (21%) Americans is an *Achiever*; yet *one in four (26%) public radio listeners is an Achiever*. Unlike its *Societally Conscious* and *Experiential* listeners, public radio's Outer-Directed *Achievers* conduct their lives in response to external signals. Consumption, activities, and attitudes are all guided by what Outer-Directeds think others will think.

Outer-Directeds tend to be the happiest Americans, being well attuned to the cultural mainstream — indeed, exerting a strong influence on it.

Achievers are competent, self-reliant, and efficient. They tend to be materialistic; hard working; and oriented to fame, success, and comfort. As one might expect, Achievers include many leaders in business, the professions, and government. They are affluent and fuel the economic system in response to the American Dream. As such, they are the defenders of the economic status quo.

Achievers are among the best adjusted of Americans, being well satisfied with their place in the system. They tend to enjoy some of the same activities as the Societally Conscious and have similar buying patterns. But, unlike the Societally Conscious, they are not very interested in the arts, nor do they find much time to attend cultural events.

Achievers spend more time listening to the radio than do the Societally Conscious, but only 31% of this time is spent with public radio. Because Achievers are focused on success, many enjoy programming that will help them get ahead professionally and financially.

Summary

The values and lifestyles insights provided by VALS combine with demographic data to provide a much richer profile of the public radio listener than ever before available.

For instance, we've known for years that public radio's audience is well educated, but now we also know that there are at least three types of well-educated listeners: Societally Conscious persons, Experientials, and Achievers.

It has also been common knowledge that many public radio listeners are professionals, technicians, managers, and administrators. Now think about this: Six in 10 (59%) Societally Conscious listeners hold professional or technical jobs as compared to four in 10 (37%) Experientials and three in 10 (29%) Achievers.

VALS also adds depth to PRIZM's geodemographic scheme. On the one hand, Societally Conscious persons tend to live in the most affluent suburban and city neighborhoods — Suburban 1 and 2 plus Urban 1 areas. Experientials live in cities — primarily Urban 1, 2, and 3 neighborhoods. On the other hand, Achievers reside in all three of the top socioeconomic suburban neighborhoods.

A majority of Achievers tend to favor life in the suburbs, while 50% of the Societally Conscious prefer small towns and rural areas, and another 25% live in large central cities. Achievers tend to be Republican (58%), while the Societally Conscious are primarily Independent (57%), with 30% Democratic and only 14% Republican.

How can you use these data in your underwriting efforts? Turn to the next section to find out.

3.

PROSPECTING AND SELLING: A CASE STUDY

The following case study is an example of how AUDIENCE 88 data can help you sell underwriting at your station. Although the product is classical music, you can follow the same steps whether you are trying to sell information or jazz programming, All Things Considered, or Morning Edition. (Quantitative and qualitative data on specific formats and programs can be found in Section 4 of this handbook.)

You are responsible for selling underwriting at a public radio station serving a midsized community. You are preparing materials to convince a business to underwrite your classical music programming.

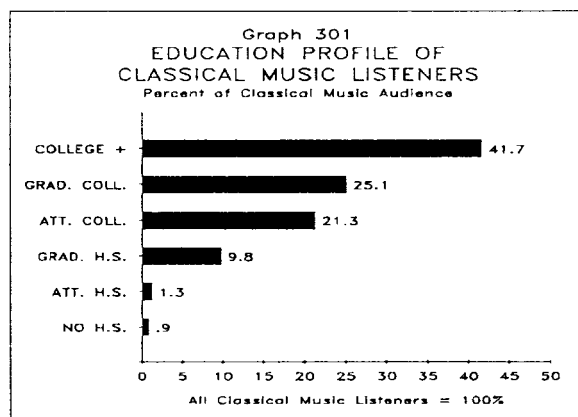
Having just received the AUDIENCE 88 *Underwriting* report, you decide to develop an underwriting presentation based on the new data you now have on hand.

Determining Prospect Priorities

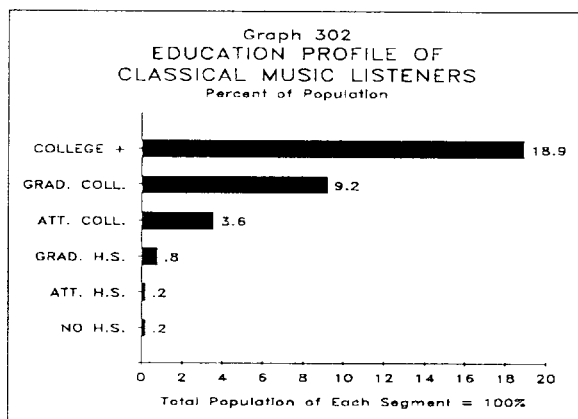
You begin by studying the audience data to determine prospect priorities. Since you're working on classical music, you'll want to look at data specific to the format rather than data describing the entire public radio audience.

Which companies in your community would be the most likely classical music underwriting candidates? Reviewing the demographics in Section 4 of the AUDIENCE 88 *Underwriting* report, you see that half (50%) of public radio's classical music listeners are between the ages of 25 and 44.

Looking at education, you are not surprised to discover public radio's classical music listeners are very well educated. Sixty-seven percent are college graduates!



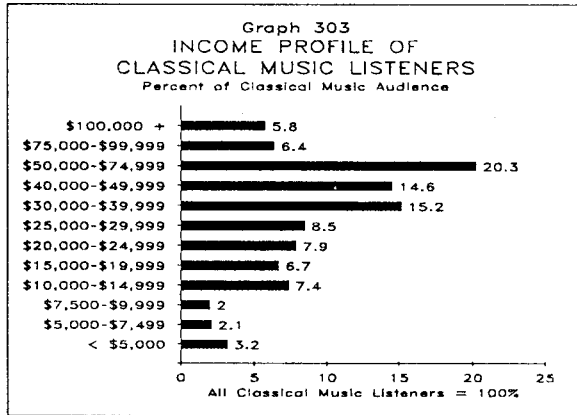
In addition, 19% of all Americans who have attended graduate school listen to classical music on public radio each week.



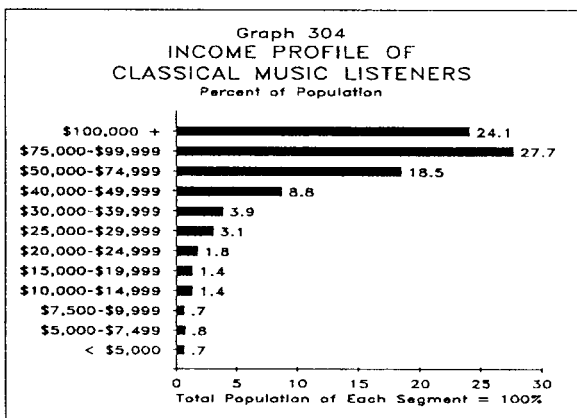
You realize public radio's classical music reach into educated markets is outstanding.

Income parallels education. The higher the education, the higher the income. Therefore, it makes sense that most listeners to classical music on public radio are affluent.

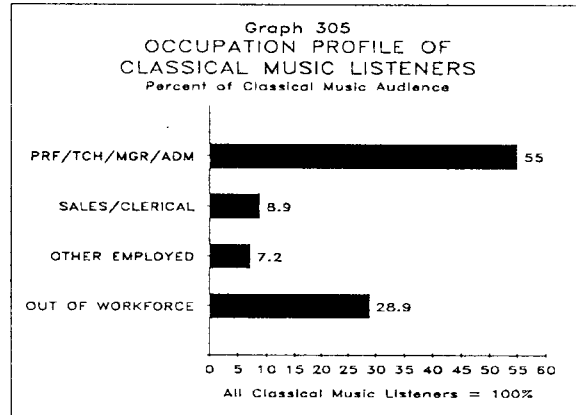
One-third (33%) of public radio's classical music listeners have annual household incomes of \$50,000 or greater.



Also, almost one-quarter (24%) of Americans with household incomes of \$100,000 or more listen to classical music on public radio each week, and 28% with household incomes between \$75,000 and \$99,999 listen. That's quite a reach into a wealthy market!



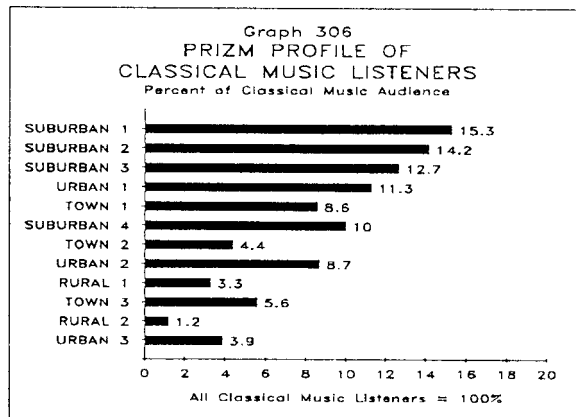
With their high incomes, you are not surprised to discover professionals, technicians, managers, and administrators make up over half (55%) of the public radio classical music audience. (See Graph 305.)



You now see how you can use demographics to build a strong underwriting case for businesses that want to reach an upscale, highly educated, professional group of consumers.

With a handle on demographics, you turn to the geodemographic data on the listeners of classical music on public radio. You learn that people who live in the most affluent suburbs (S1, S2, and S3 neighborhoods) are more attracted to classical music on public radio than other Americans.

These neighborhoods comprise the highest socio-economic group of educated executives and professionals in America. Forty-two percent of public radio's classical music listeners reside in these suburbs, with another 11% living in affluent Urban 1 neighborhoods.

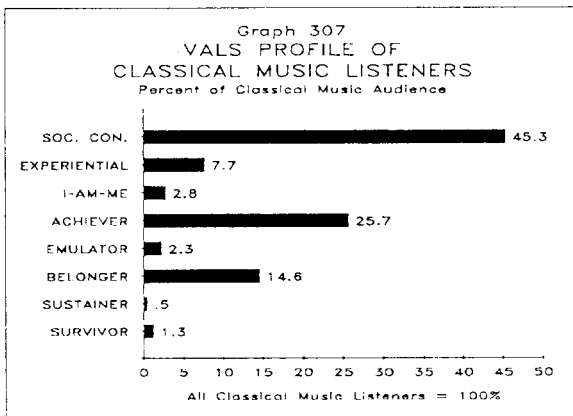


Before studying the VALS (Values and Lifestyles) data on your classical music listeners, you review the information you have gathered so far.

Listeners of classical music on public radio are

- Primarily 25 years of age and older; half (50%) are between 25 and 44 years old.
- College graduates. Twenty-five percent are college grads, and 42% have pursued an education beyond college.
- Affluent. Thirty-three percent have household incomes of \$50,000 or more. And over 25% of people with household incomes of \$75,000 or more listen in an average week.
- Employed in white-collar jobs. Over half (55%) are professionals, technicians, managers, and administrators.
- Residents of affluent suburbs and the more up-scale urban neighborhoods.

To learn more about the values and lifestyles of your classical music listeners, you turn to the Classical Music Programming VALS data in Section 4 of the AUDIENCE 88 *Underwriting* report. You discover that the Societally Conscious make up the largest group (45%) of the public radio classical music audience. Achievers place second at 26%.



In addition, as you can see from Graph 308 in the next column, 11% of all Societally Conscious Americans listen each week, as do 4% of all Achievers.

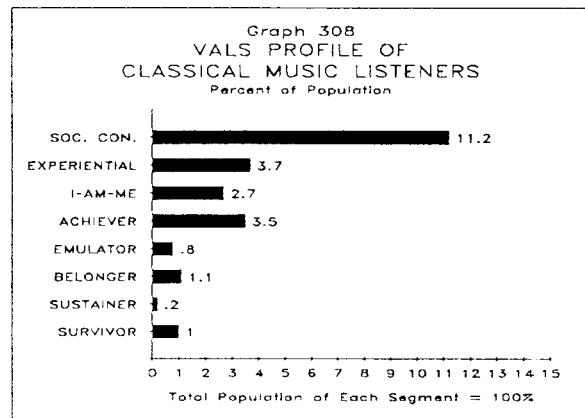
Since the majority of people who listen to classical music on public radio are Societally Conscious and Achievers, you develop a VALS profile of public radio classical music listeners based on the data

provided in Sections 2 and 4 of the AUDIENCE 88 *Underwriting* report and the *Terms & Concepts* handbook.

VALS Profile

The public radio classical music audience comprises

- 45% Societally Conscious
 - Are Inner-Directed
 - Are socially responsible
 - Participate in the arts and cultural events
 - Travel often
 - Enjoy outdoor sports
 - Read a lot
 - Own subcompact vehicle
 - Own sophisticated electronic equipment
 - Listen to public radio
- 26% Achievers
 - Are Outer-Directed
 - Compose part of the “cultural mainstream”
 - Are competent, self-reliant, efficient, materialistic, and success oriented
 - Tend to be business leaders
 - Listen to public radio, but not as often as the Societally Conscious



You also turn to *The NPR Audience*¹ and *The Classical Advantage*² handbooks to learn even more about your classical music listeners. You note their specific values, attitudes, activities, and buying patterns.

Studying the demographic, geodemographic, and values and lifestyles data on the classical music listener, you are able to make an educated guess as to which companies will be most likely to underwrite classical music. Travel agencies, record shops, book stores, car rental agencies, sporting goods shops, health clubs, health food stores, and home electronic stores appear to be among the most promising.

Once you determine which kinds of businesses will most benefit from underwriting, you develop a Prospect Priority List of specific companies in your community that would be most likely to underwrite classical music programming on your station. (For details on how to develop a Prospect Priority List, refer to the Development Exchange's *Business/Corporate Support Handbook*).³

Preparing for the Underwriting Sales Presentation

The first company on your Prospect Priority List is the major travel agency in town. You call the marketing director to set up an appointment. With the date set 1 week away, you begin preparing yourself for your meeting by studying specific AUDIENCE 88 data that will support your case for underwriting classical music on your station.

You know from your data that a majority of classical music listeners on public radio are well-educated professionals, technicians, managers, and administrators with relatively high household incomes. They tend to live in affluent suburban and upscale urban neighborhoods, and they are likely to be Societally Conscious and Achievers. You know from the VALS descriptions that these two groups travel often, both for business and pleasure. They also use travel agencies.

In addition to pulling together public radio audience data, you obtain advertising rate cards from the commercial publications and stations in your community — paying particular attention to the local commercial radio stations on which the travel agency has been advertising. You also develop a fact sheet, describing specific benefits a travel agency will receive by underwriting classical music on your station.

Making the Underwriting Sales Presentation

Upon arriving at the travel agency, you introduce yourself, then begin asking questions to determine the goals and objectives of the agency. As you anticipate, the agency's goal is to be profitable and to increase the number of individuals using its service. Naturally, its target market is the affluent frequent flier — more specifically, professionals and managers with household incomes of \$50,000 or more.

You walk the marketing director through your data, first using the Underwriting Presentation Sheets provided with your AUDIENCE 88 *Underwriting* report. You demonstrate how the public radio audience parallels the agency's target market. You conclude your presentation by presenting specific information on the classical music audience — classical music listeners indexed to the public radio audience, percentage reach (cume rating), and percentage composition.

After listening to your presentation, the marketing director agrees that your station offers an upscale audience — people who tend to travel a lot. But she is still concerned with the actual number of people listening to your station.

Admitting your station's overall cume is relatively low, you stress the extraordinary reach public radio has into affluent markets. National studies show that one in four Americans who have household incomes of \$50,000 or more listen to classical music on public radio each week!

You also point out that one-third (33%) of public radio's classical music listeners have household incomes of \$50,000 or greater. And over half (55%) are professionals, technicians, managers, and administrators.

Because public radio listeners primarily reside in affluent suburban neighborhoods and because they, for the most part, exhibit the values and lifestyles of the Societally Conscious and Achievers, you know a very large percentage of them travel often and use travel agencies.

With such a high percentage of public radio's classical music listeners having the demographic, geodemographic, and lifestyle characteristics of the

travel agency's target market, and knowing the cost of underwriting is less than the cost of advertising on commercial radio, you explain how underwriting on public radio is a more efficient and cost-effective way to reach the agency's target market than is advertising on commercial radio.

You show the marketing director that the cost of an underwriting credit is less than the cost of a commercial. (You have obtained the advertising rate cards from local media.) You compute CPM (Cost Per Thousand — the cost of reaching 1,000 persons one time) in this way:

1. Divide the cost of underwriting classical music on your station by the number of announcements recognizing the underwriter. This is the cost per underwriting announcement.
2. Divide the cost per underwriting announcement by your station's Average Quarter Hour (AQH) persons (in 1,000s) for classical music. This is the underwriter's CPM — the cost of reaching 1,000 classical music listeners with one underwriting announcement.

(For more details on how to compute CPM, refer to the Development Exchange's *Business/Corporate Support Handbook*.³)

You then compare your CPM to those listed in the advertising rate cards you've collected and prove that underwriting on public radio is very efficient in reaching specific target markets and less costly than advertising on commercial stations.

You also mention that the agency's underwriting message will be heard in an uncluttered environment. It will stand out — and not be blurred by a multitude of commercial announcements.

Using the public relations claims made in Section 1 of this report, you also share with her the good-will/good image benefits of underwriting public radio. Not only will the agency be reaching the consumers it wants to reach, but it also will be identifying with a quality institution. People who hear the agency's underwriting message will think more highly of the agency — and be more likely to use its services.

On its face this is an extremely powerful argument; in addition, it is an argument that would be very difficult for many commercial stations in your market to match.

After completing your presentation, the marketing director is convinced that the most efficient and effective way to spend the agency's marketing dollars is by underwriting classical music on your station.

And, she likes the added public relations benefit of associating with quality — a quality institution, quality programming, and a quality audience.

Well-argued and clearly presented, your professional, benefits-oriented presentation will go a long way toward successfully closing a sale.

Summary

Each time you make an underwriting presentation, don't forget these key steps.

1. Illustrate the target audience reached.
2. Demonstrate the efficiency of this reach.
3. Explain the cost effectiveness in comparison to other media.
4. Substantiate the qualitative association factors that come with underwriting.

Remember, AUDIENCE 88 data can be used for

- Prospecting — Determining which companies are your best prospects.
- Selling — Building a case for a cost-effective and efficient way to reach an upscale audience.
- Selling — Building a case for underwriting as an enhancement to, or as a replacement for, commercial advertising.
- Selling — Building a case for underwriting as a good public relations vehicle.

¹ *The NPR Audience*, National Public Radio, 2025 M Street, NW, Washington, DC, 20034, 1986.

² *The Classical Advantage*, WFMT, 303 E. Wacker Drive, Chicago, IL, 60601, 1984.

³ *Business/Corporate Support Handbook*, Development Exchange, Inc., 1200 15th Street, NW, Suite 210, Washington, DC 20005, 1985.

4.

SELLING FORMATS AND PROGRAMS TO UNDERWRITERS

Information presented in this section serves as a reference to help stations develop underwriting Prospect Priority Lists and presentations for a variety of public radio formats and programs.

The following pages provide demographic, geodemographic, and values and lifestyles data on information, classical music, jazz, and opera programming, plus *All Things Considered*, *Morning Edition*, *Weekend Edition*, and *A Prairie Home Companion*.

The narrative copy highlights important findings of the AUDIENCE 88 study, and the graphs provide more detailed data for each format and program.

You are encouraged to copy and use these graphs when developing fact sheets and support materials for your underwriting sales presentations.

To gain the most from the AUDIENCE 88 data, follow the steps described in the Prospecting and Selling Case Study in the previous section of this report to develop your strategies for selling public radio formats and programs to underwriters.

CRITICAL CONCEPTS — A REVIEW

Index

Index is the likelihood of a format's cume listeners being in a particular audience segment in comparison with all public radio listeners.

A format's index of .13 in an audience segment is interpreted as follows: Compared with other public radio listeners, this format's listeners are 13% more likely to be in this particular audience segment.

Composition

Composition is the percentage of a format's cume listeners who are in a particular audience segment.

A format's composition of 29 in an audience segment is interpreted as follows: Twenty-nine percent of the format's listeners are in this audience segment.

Reach

Reach is the percent of the U.S. population in a particular audience segment listening to a format for at least 5 minutes in a week. The same as cume rating.

A format's reach of 3.5 into an audience segment is interpreted as follows: Three and one-half percent of all Americans in this particular segment listen to the format each week.

Age and Gender

Information Programming

The audience for public radio's information programming comprises primarily persons between the ages of 25 and 64. Its prime appeal, however, is to listeners age 35 to 44; over one-quarter of the format's listeners are in this age range. Well over 5% of all Americans age 35 to 44 listen to public radio's information programming each week. The format appeals almost equally to men and to women.

Classical Music Programming

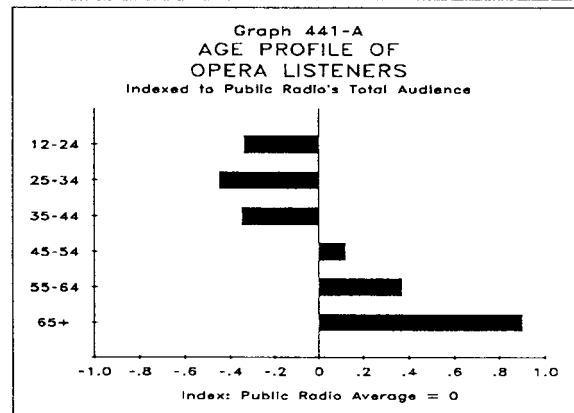
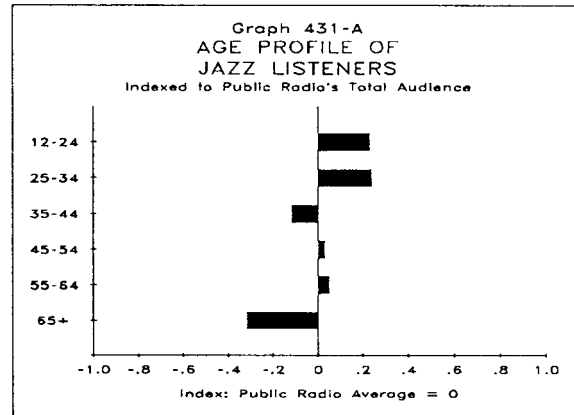
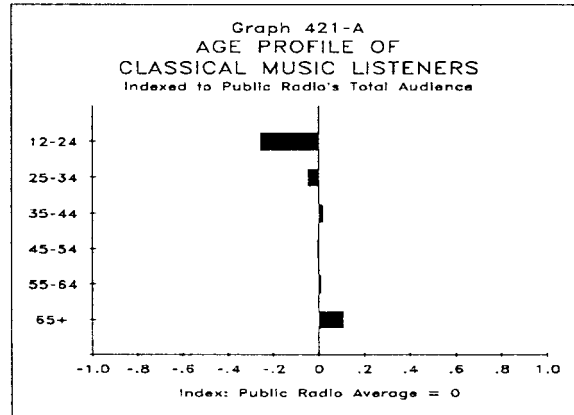
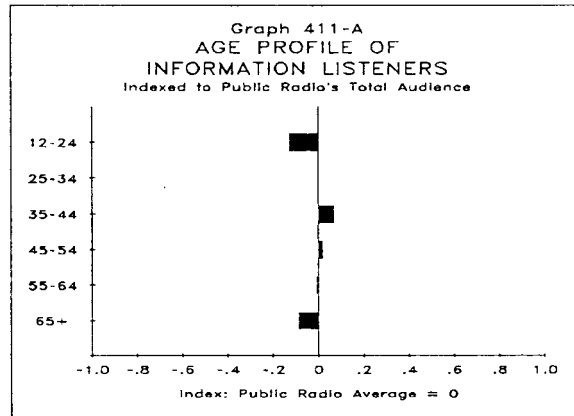
Half of public radio's classical music audience is between 25 and 44 years old. But except for opera, classical music has the oldest appeal of any major music format on public radio. Listeners 65 and older are 11% more likely than are others to tune in to classical music each week. Classical music and opera are public radio's only major music formats that appeal more to women than to men.

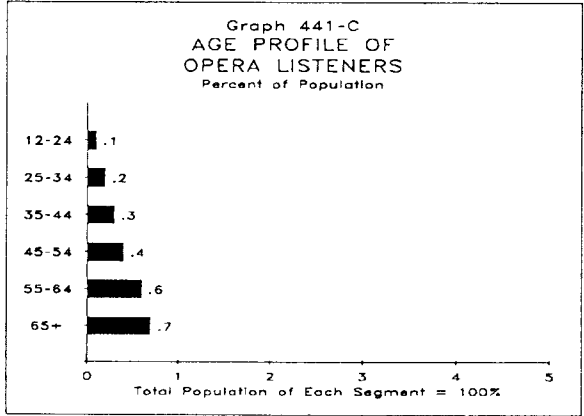
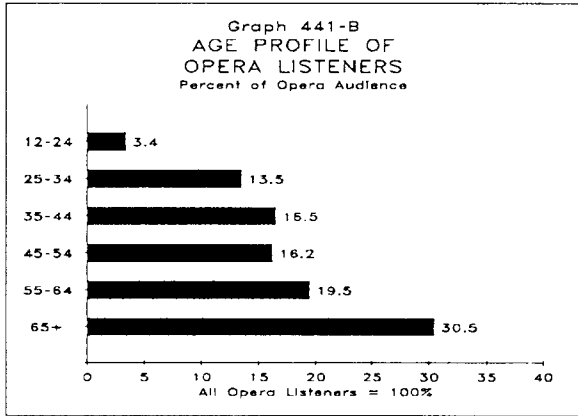
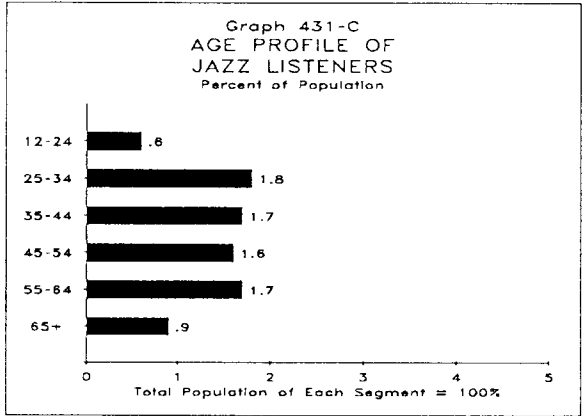
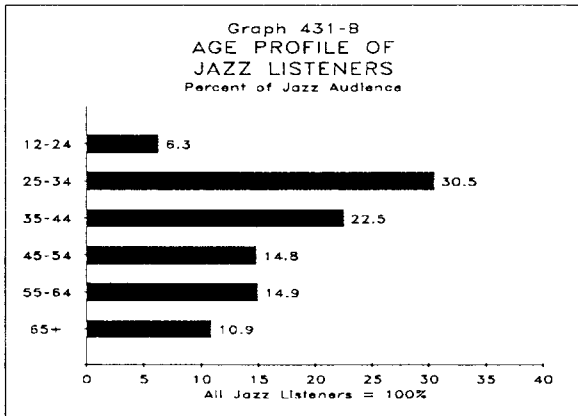
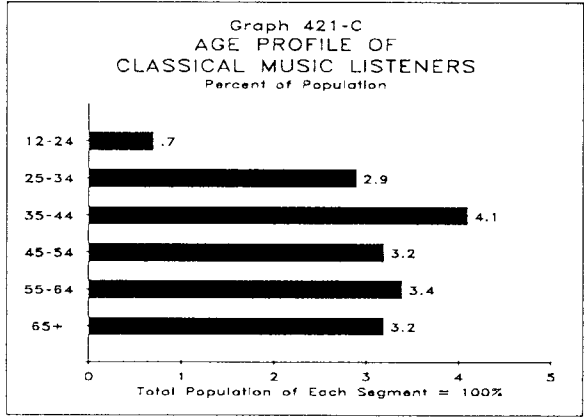
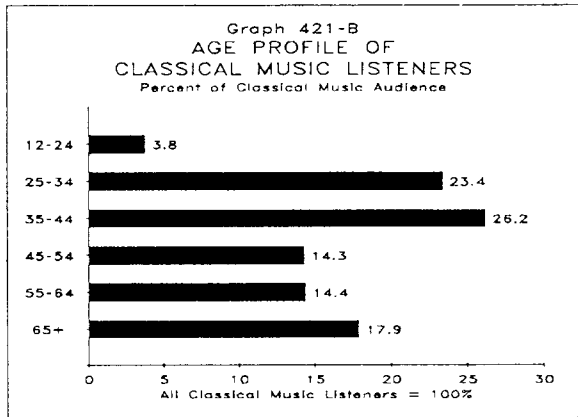
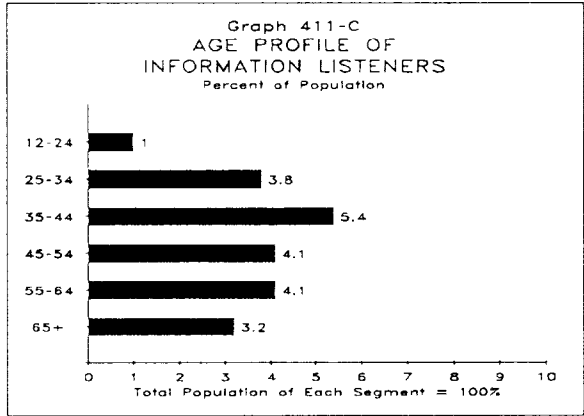
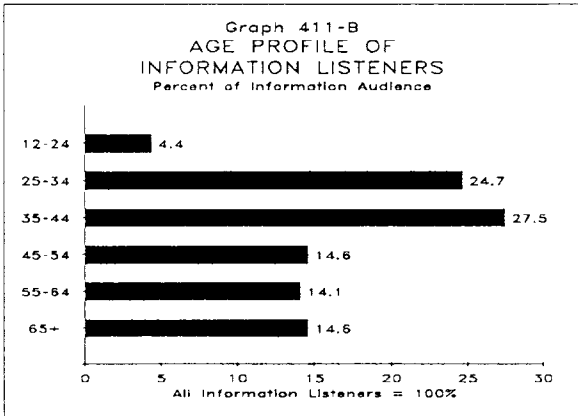
Jazz Programming

Jazz programming has the youngest appeal of any major music format on public radio. Nearly one-third of its weekly listeners are 25 to 34 years old. Jazz offers a good way for an underwriter to reach public radio's young men.

Opera Programming

Opera has the oldest appeal of any major music format on public radio. Listeners 55 to 64 years old are 37% more likely than are other listeners to tune in to opera on public radio; those 65 or older are 90% more likely. One-third of opera's listeners are 65 years or older. Underwriters wishing to reach older women should consider opera; women are 14% more likely to listen than men.





Education

Information Programming

The better educated a public radio listener is, the more likely he or she is to listen to its information programming. Information is the most efficient and effective format for underwriters wanting to reach highly educated consumers on public radio: efficient because four in 10 listeners have pursued an education beyond college; effective because one in four Americans with graduate educations listens each week.

Classical Music Programming

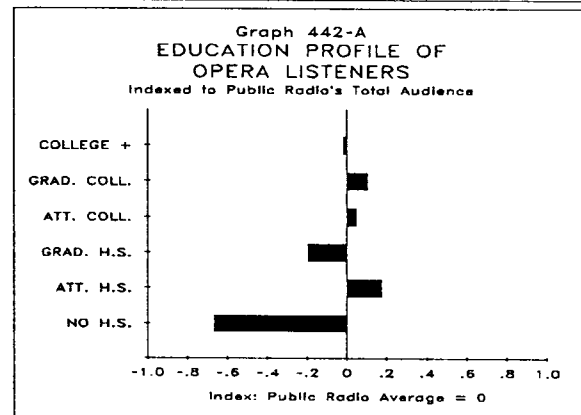
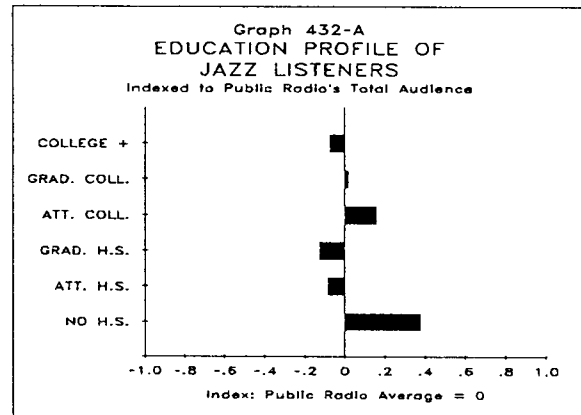
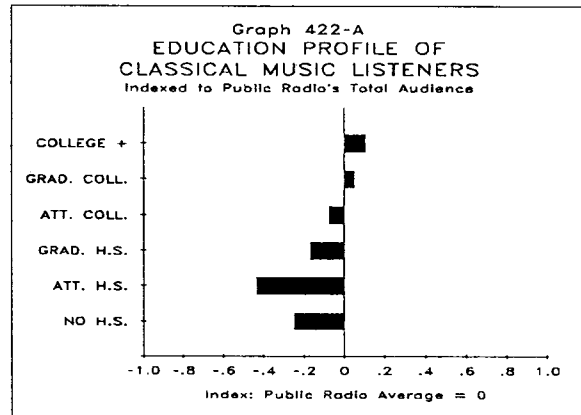
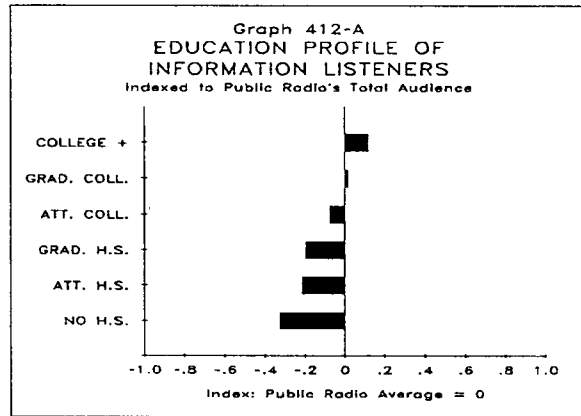
Classical music also appeals to well-educated listeners. One in five Americans with graduate educations listens to this public radio format each week. Four in 10 listeners of classical music on public radio have attended graduate school.

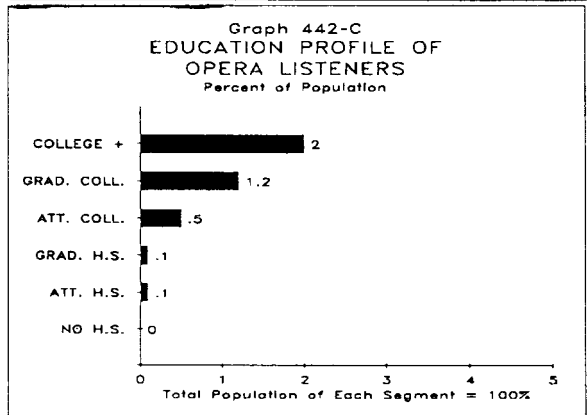
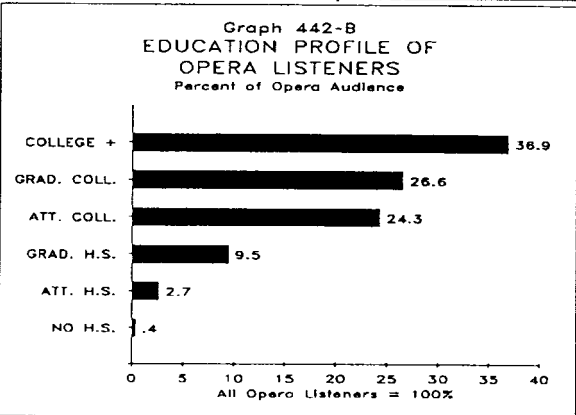
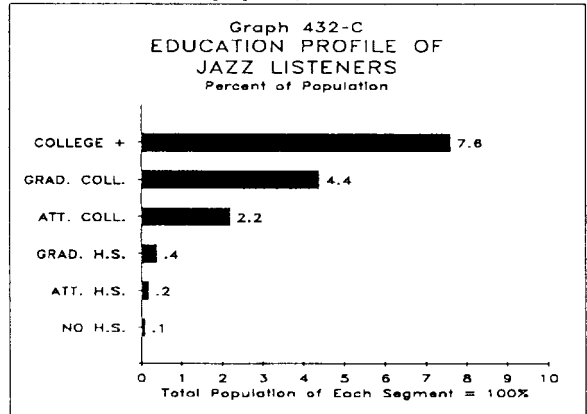
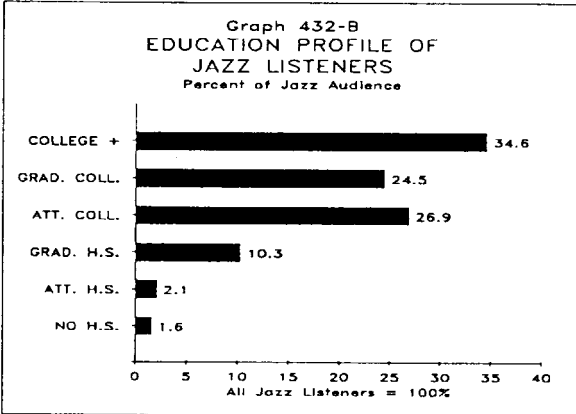
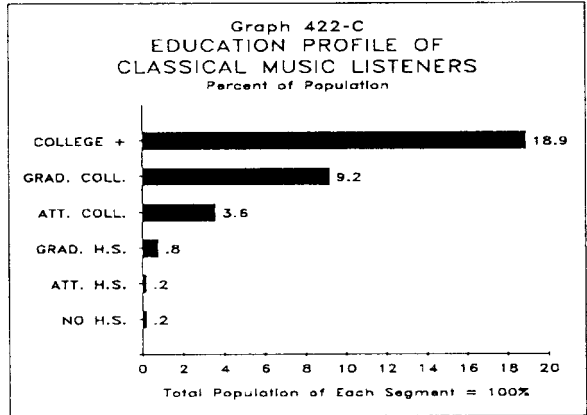
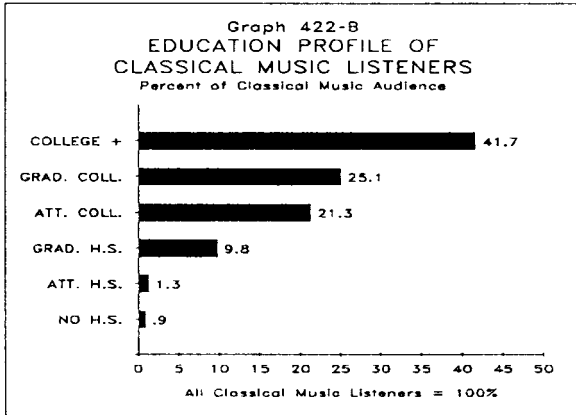
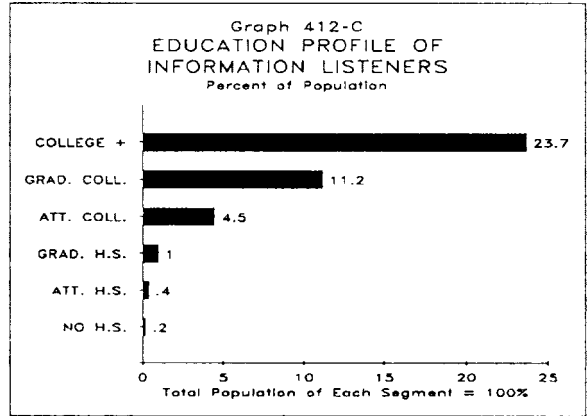
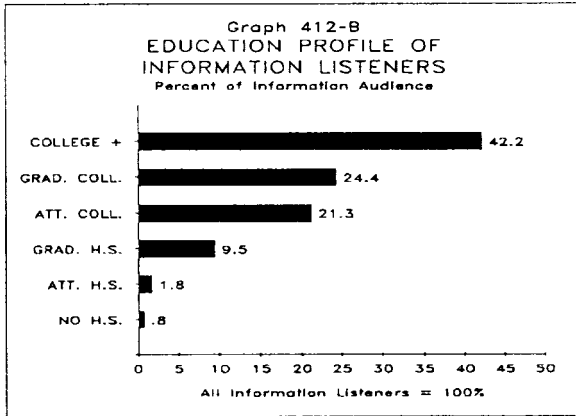
Jazz Programming

The educational appeal of public radio's jazz is quite different from that of other programming; listeners who have not graduated from college are somewhat more likely to tune in than are others. Nonetheless, the format's reach into well-educated segments of society is far from short. Over one-third of public radio's jazz audience has attended graduate school; in fact, one in 12 Americans with graduate educations listens each week.

Opera Programming

Public radio's opera programming appeals to people who have attended graduate school — 37% have pursued an education beyond college. Two percent of all Americans with graduate educations listen to public radio's opera each week.





Occupation

Information Programming

Public radio's information programming is an attractive medium for underwriters wishing to reach people in upscale occupations. Fifty-eight percent of public radio's information listeners have professional, technical, managerial, and administrative positions.

Classical Music Programming

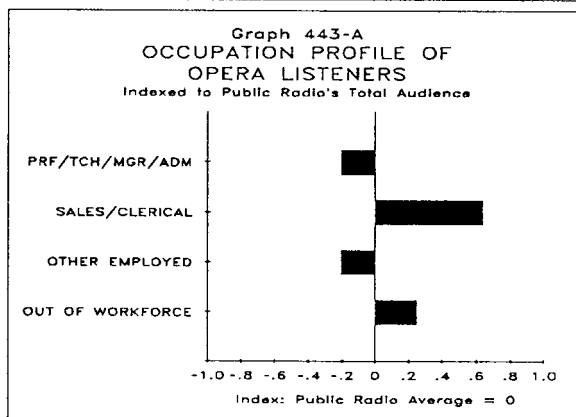
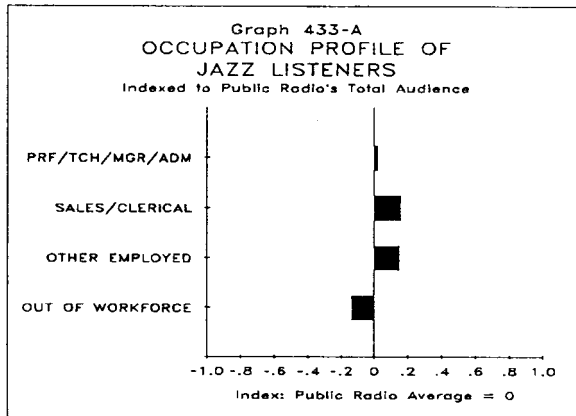
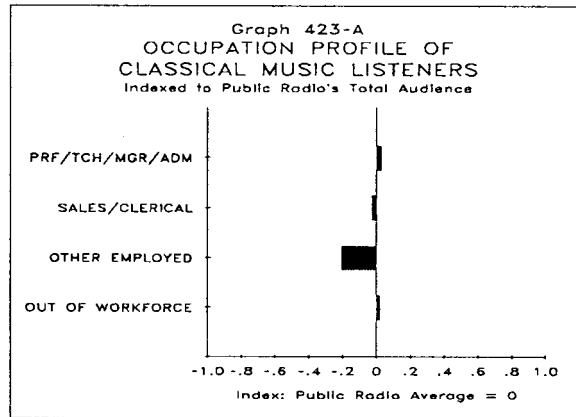
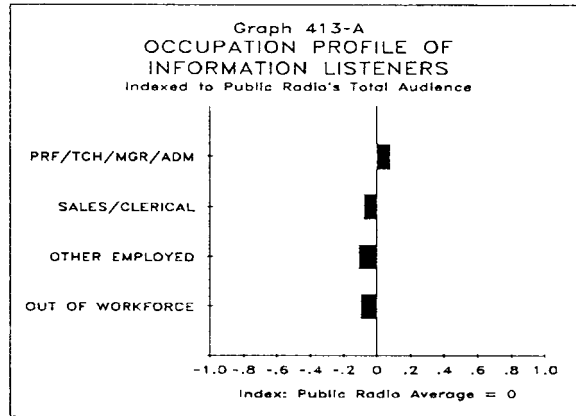
Like its information programming, public radio's classical music is another efficient medium for reaching people in upscale occupations. Over half of the format's listeners hold professional, technical, managerial, and administrative positions.

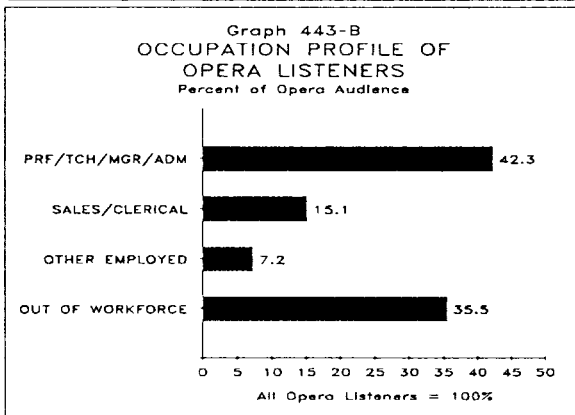
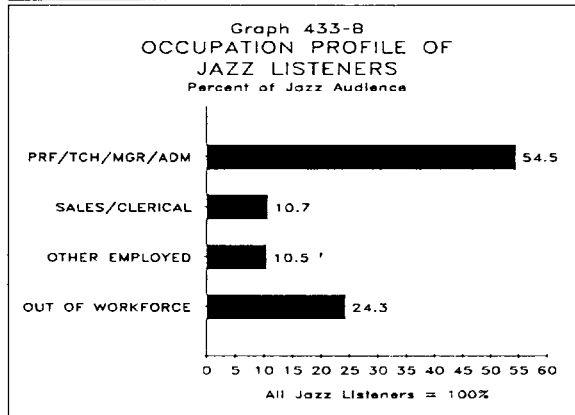
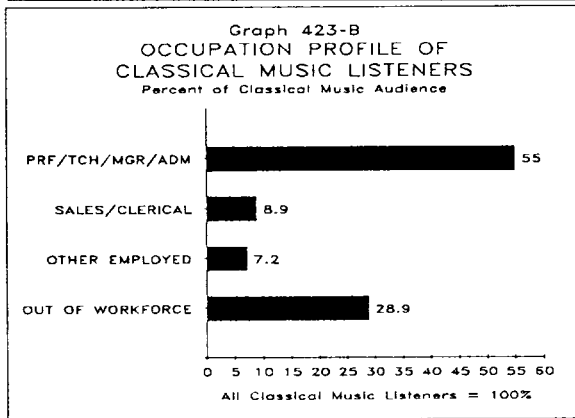
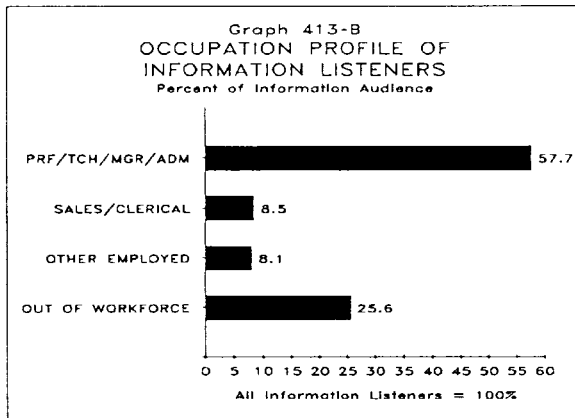
Jazz Programming

Because they are younger, public radio's jazz listeners are slightly more likely than are other listeners to hold sales and clerical positions. Notwithstanding, over half hold the high-level positions described above.

Opera Programming

While jazz attracts public radio's youngest listeners, opera appeals to its oldest. Occupations reflect this difference. While listeners with top-level positions compose the bulk (42%) of opera's audience, 36% of opera's listeners are not in the work force, and 15% hold sales and clerical positions. Opera programming is most appropriate for businesses seeking older, well-educated consumers in a variety of occupations.





Income

Information Programming

Businesses targeting an upscale market will be impressed to learn that each week, public radio's information programming is heard by more than one-third of all Americans who have household incomes of \$75,000 or more. One in seven information listeners has a household income over \$75,000, and one in three has a household income greater than \$50,000.

Classical Music Programming

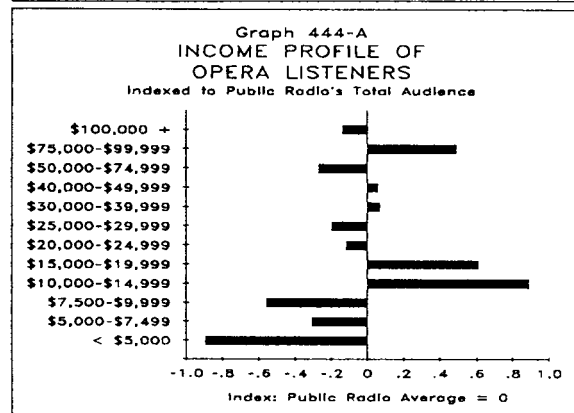
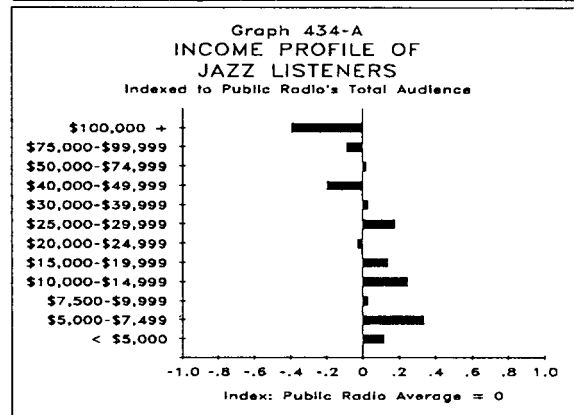
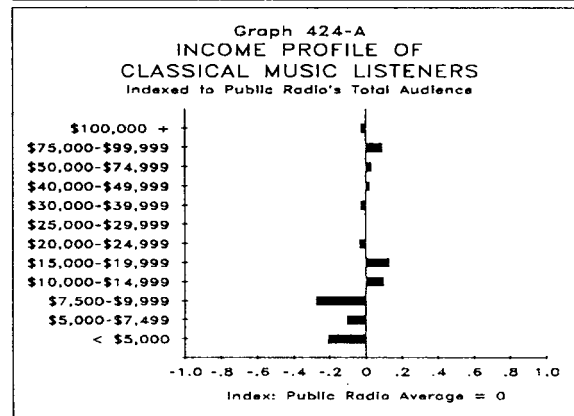
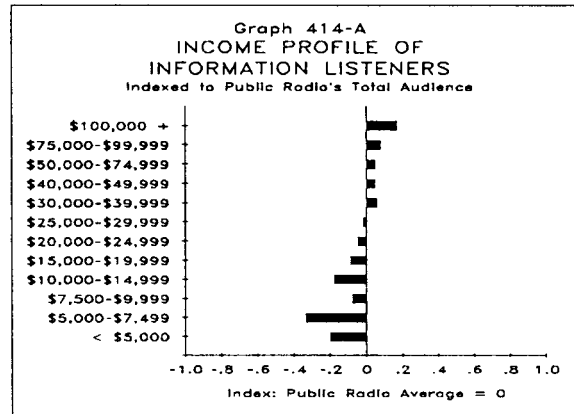
Public radio's classical music audience is nearly as affluent as its information listeners. One-quarter of all Americans with household incomes of \$75,000 or more listen to classical music on public radio each week. One in eight classical music listeners has a household income over \$75,000, and one in three earns \$50,000 or more.

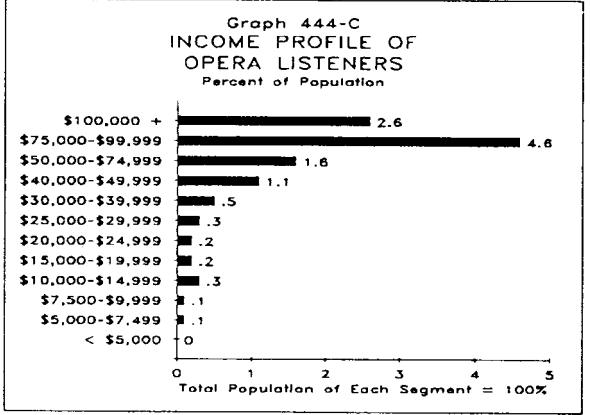
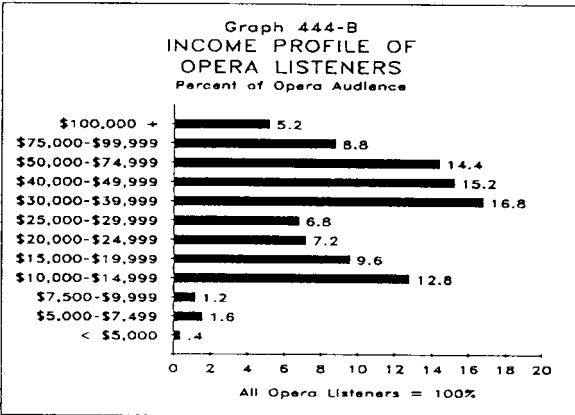
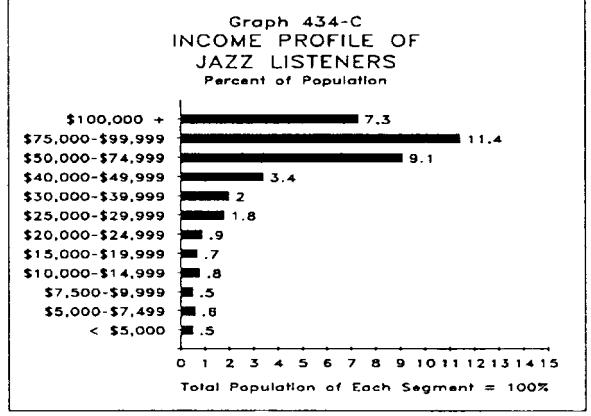
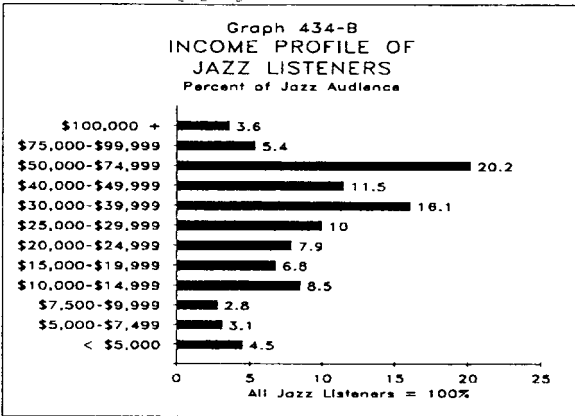
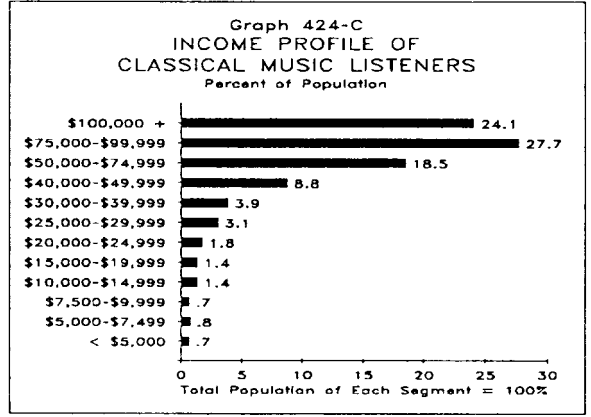
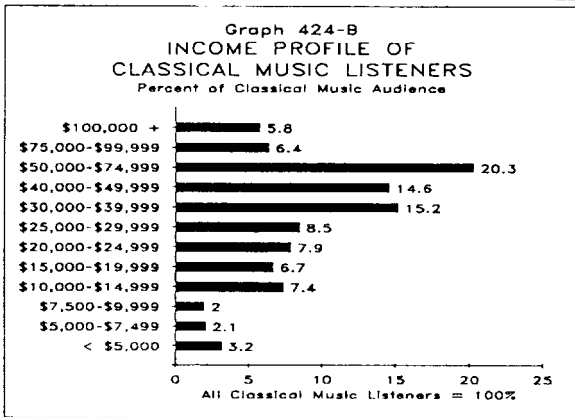
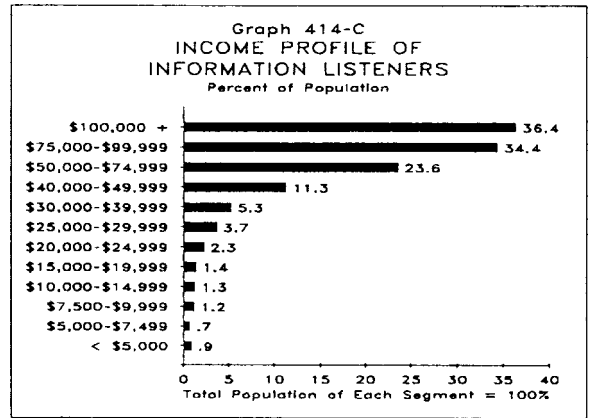
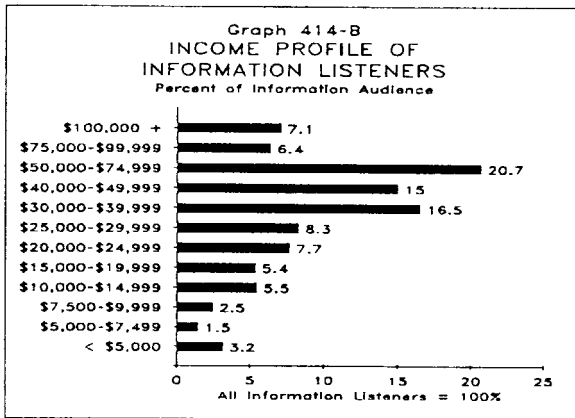
Jazz Programming

Businesses wishing to reach public radio's lower and middle income households will find jazz programming to be the most efficient. The majority of public radio's jazz listeners have household incomes between \$25,000 and \$75,000. Nonetheless, the format's reach into society's most affluent homes is far from short; one in 10 Americans with annual household incomes greater than \$50,000 listens to public radio's jazz each week.

Opera Programming

Opera is an upscale format — 14% of public radio's opera listeners have household incomes of \$75,000 or more. But because so many in this audience are retired, opera is an efficient buy into a broad range of households. Listeners in households earning \$10,000 to \$15,000 annually are 89% more likely to listen to opera than are other listeners.





Geodemographics

Information Programming

Listeners to public radio's information programming are the most highly educated, have the most professional occupations, earn the highest incomes, and live in the most affluent neighborhoods. The fact that 32% reside in S1 and S2 neighborhoods and that another 23% live in the next most affluent neighborhoods (S3 and U1) make geodemographic composition an excellent way to sell information programming to many underwriters.

Classical Music Programming

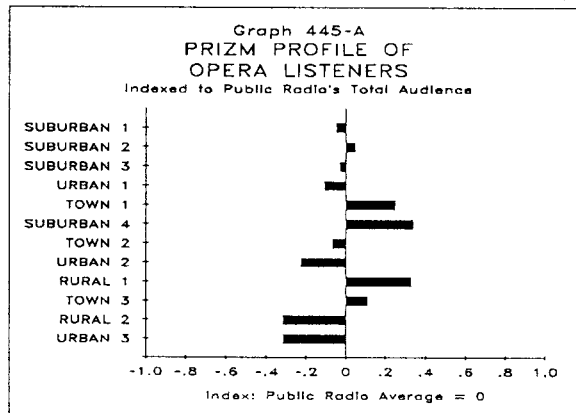
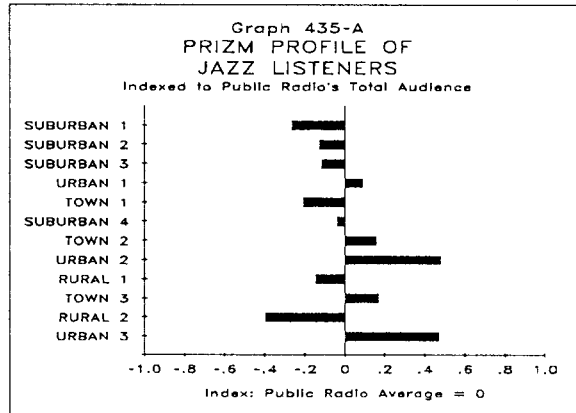
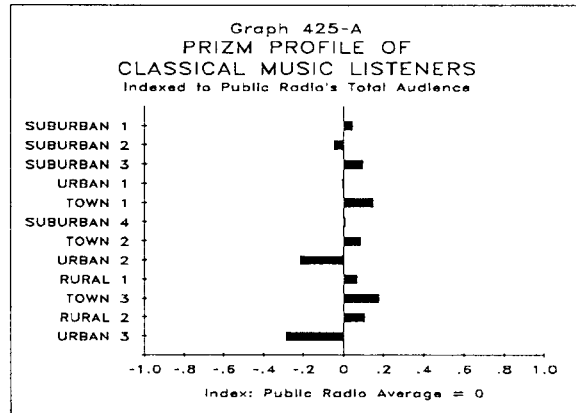
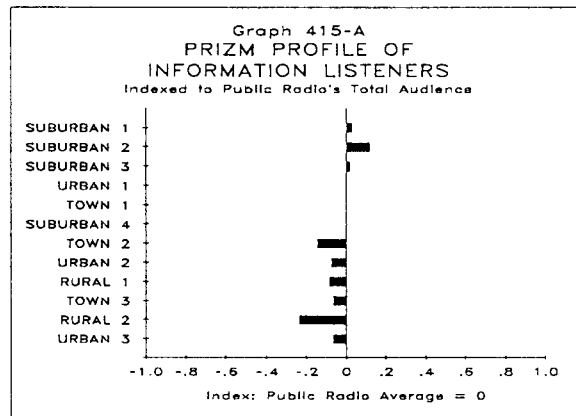
The geodemographic profile of public radio's classical music listeners is a little different from that of the information audience; classical music programming appeals slightly more to listeners in towns and rural areas. Yet audience composition is similarly upscale, with 30% residing in the top two socio-economic suburban neighborhoods and another 24% residing in the next two.

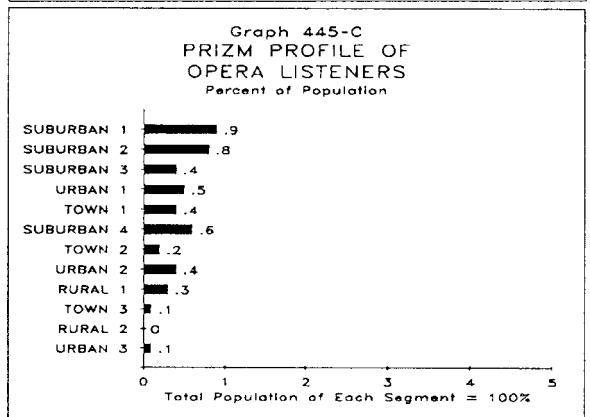
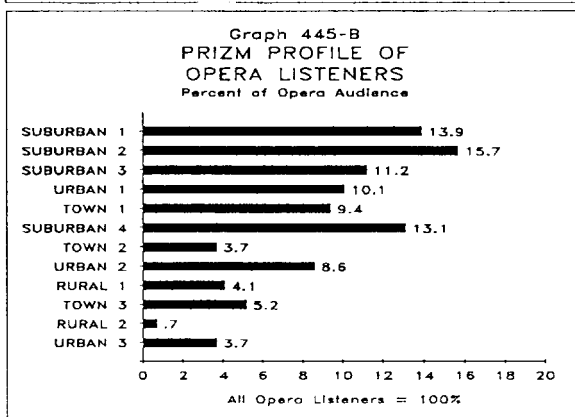
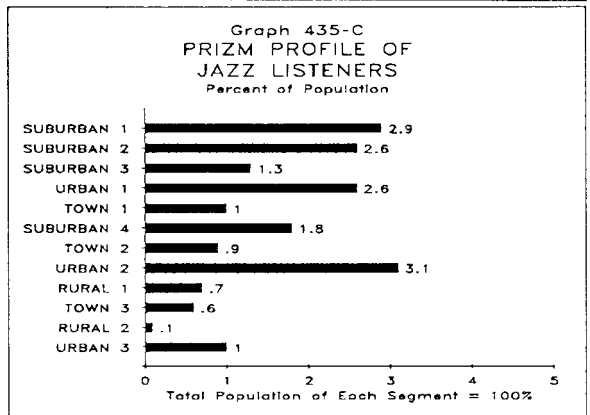
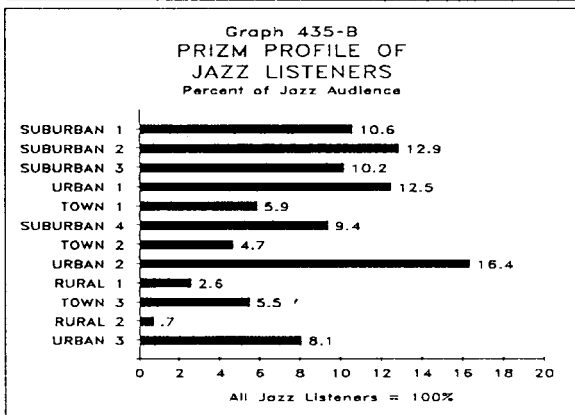
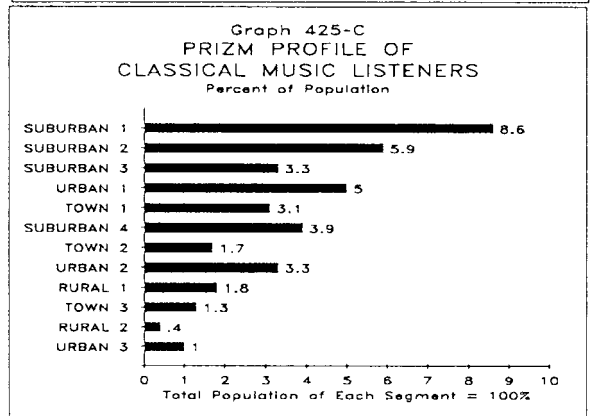
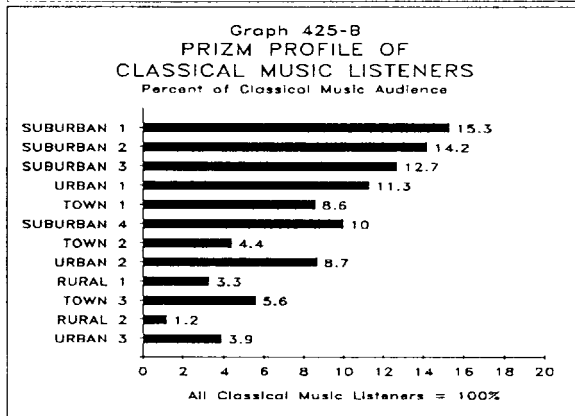
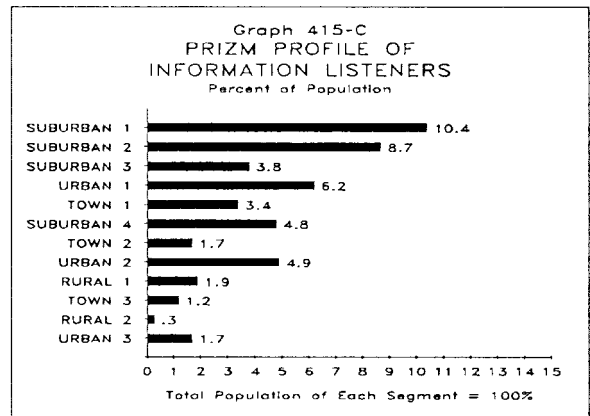
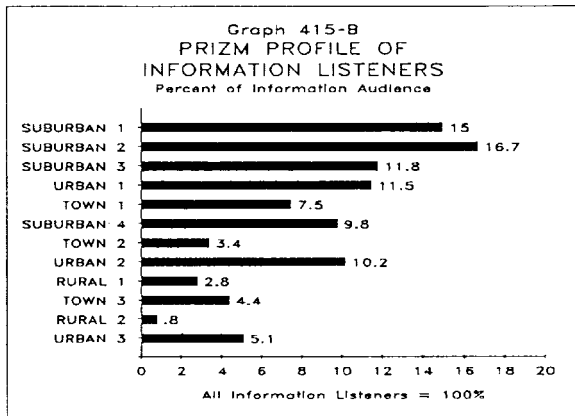
Jazz Programming

Underwriters wishing to reach city dwellers will find public radio's jazz programming quite efficient. Thirty-seven percent of the format's listeners reside in urban (U1, U2, and U3) neighborhoods. Public radio listeners residing in U2 neighborhoods are 48% more likely to listen to jazz on public radio each week than are other listeners.

Opera Programming

The geodemographics of public radio's opera listeners are similar to those of classical music listeners. Half of the audience lives in suburban neighborhoods. Opera is an efficient buy for underwriters wishing to reach listeners in these areas.





Values and Lifestyles

Information Programming

Underwriting any public radio format is an excellent way to reach America's Societally Conscious, but of the four formats studied, information programming is the best. Reach into this group of individuals is extraordinary — 15% of all Societally Conscious Americans listen to public radio's information programming each week. The format is as efficient as it is effective — one-half of its audience is Societally Conscious. Another quarter of the audience is made up of Achievers.

Classical Music Programming

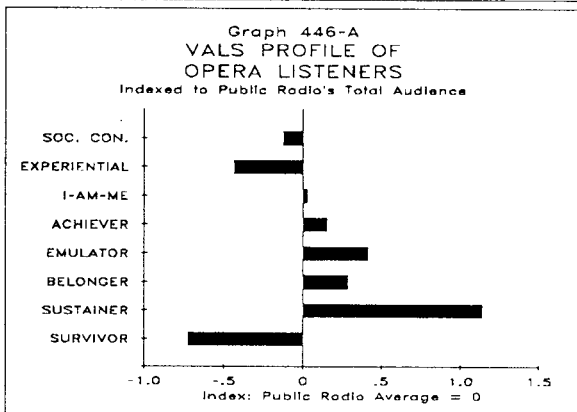
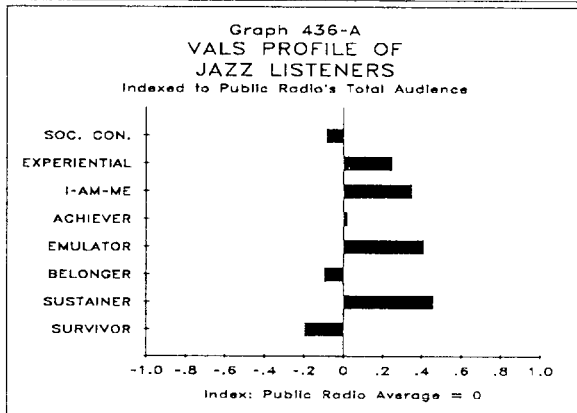
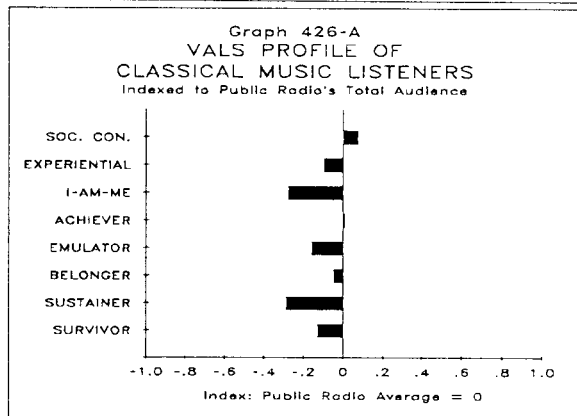
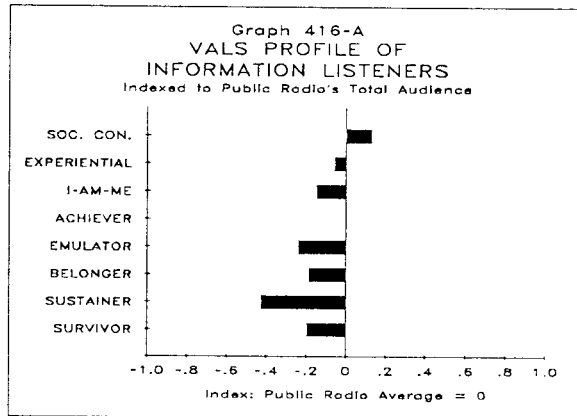
Underwriting classical music programming on public radio is another good way for businesses to reach the Societally Conscious. Public radio's classical music reaches 11% of all Societally Conscious Americans each week; nearly half (45%) of its listeners are Societally Conscious. Achievers compose 26% of the public radio classical music audience.

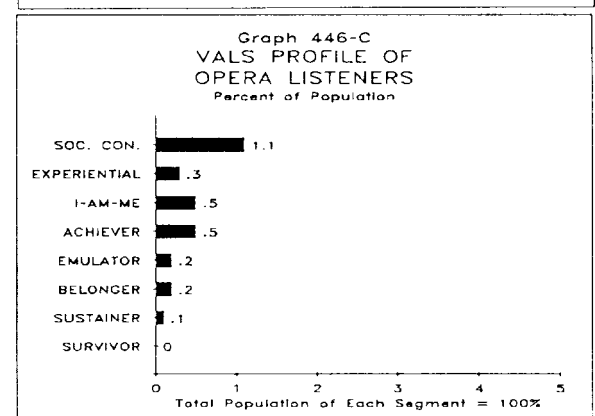
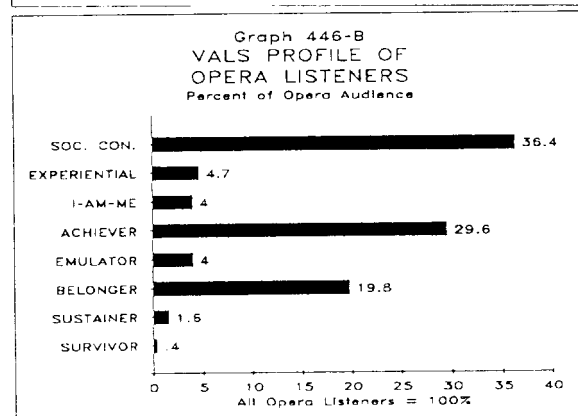
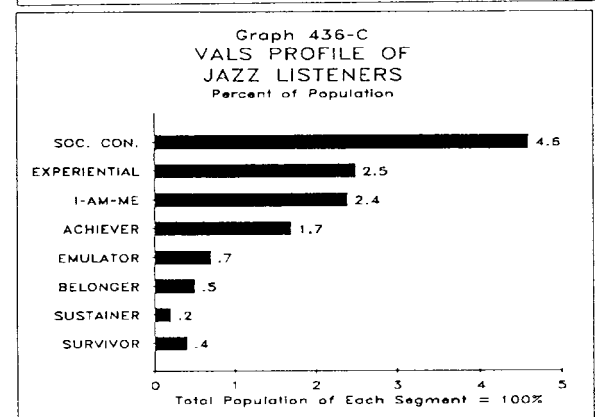
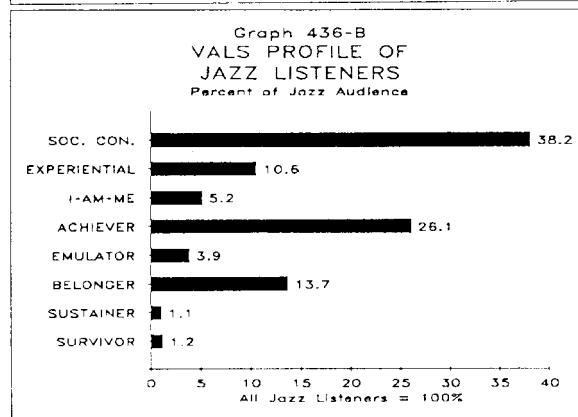
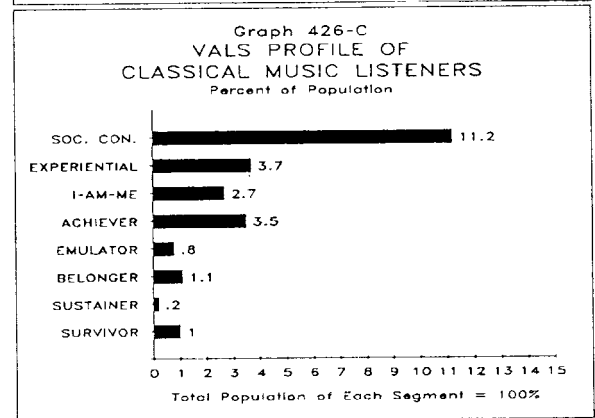
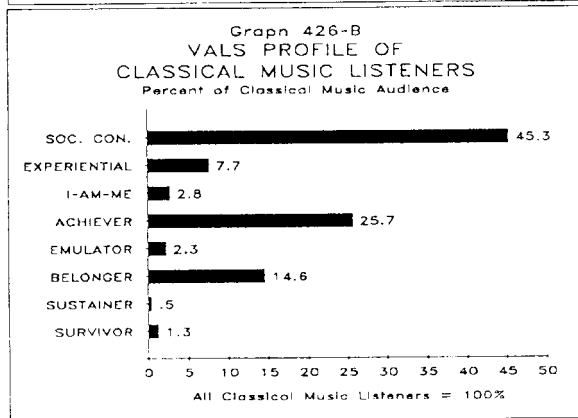
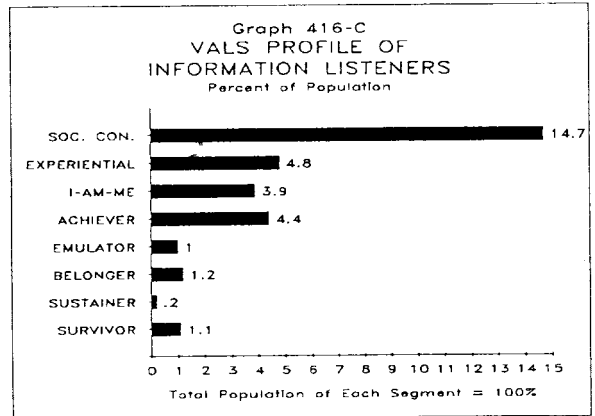
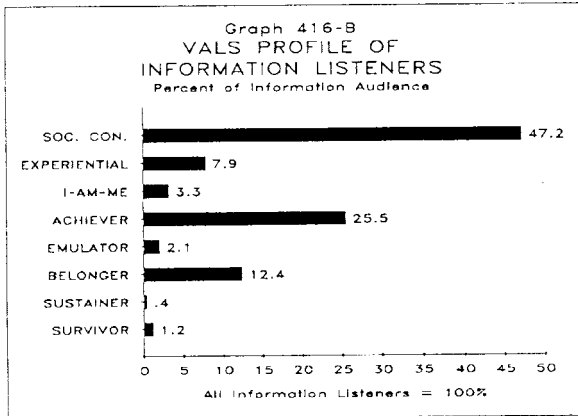
Jazz Programming

Experientials — a difficult group of individuals to reach — compose 11% of public radio's jazz audience. Once again, jazz's unique audience composition is the source of its underwriting appeal. Jazz is just as efficient in reaching Achievers as are classical music and information (26% composition), and 38% of its audience are Societally Conscious.

Opera Programming

The more traditional a listener's perspective on life, the more likely he or she is to listen to opera. Opera appeals to public radio's most Outer-Directed listeners. Belongers, Emulators, and Achievers compose well over half of the audience — an efficient buy for an underwriter wanting to reach public radio's most influenceable listeners.





Age and Gender

All Things Considered

Like information programming, the audience of *All Things Considered* comprises people age 25 to 64, but its greatest appeal is to listeners 35 to 44. In fact, public radio listeners age 35 to 44 are more likely (13%) to listen to the program than are other listeners. Although reach into this group is only 4%, composition is high, with 29% of the listeners age 35 to 44. The program appeals to men slightly more than to women.

Morning Edition

Morning Edition almost parallels *All Things Considered* with regard to age and gender. Its reach into the 35- to 44-year-old group is slightly lower (3%) and its composition is slightly higher (32%). Men are more likely to listen than are women.

*Weekend Edition*¹

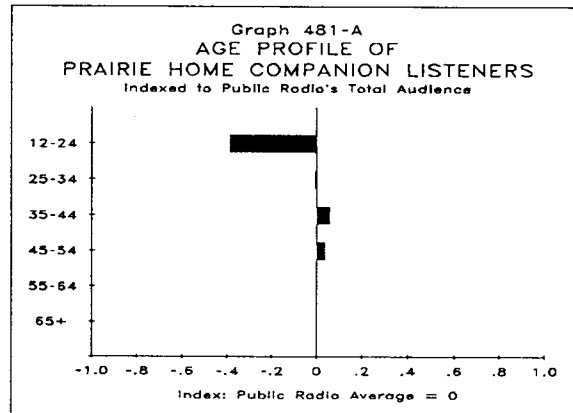
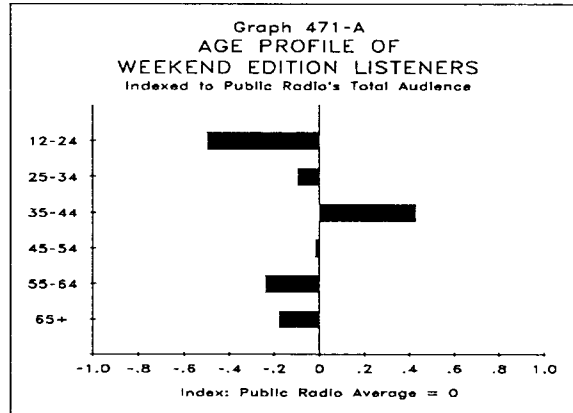
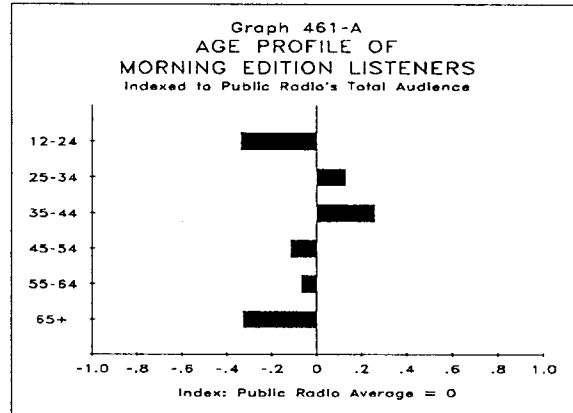
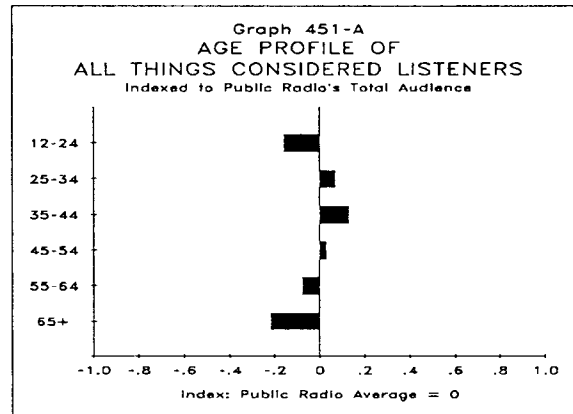
Weekend Edition is somewhat similar to the other two programs. Although fewer than 1% of Americans listen each week, its audience comprises the greatest percentage (37%) of listeners age 35 to 44. Unlike the other two programs, its appeal to women is a little higher than to men.

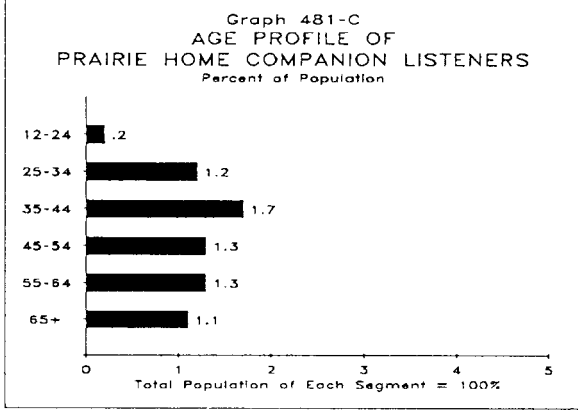
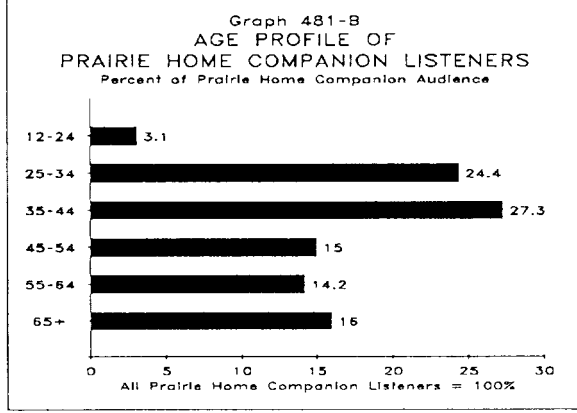
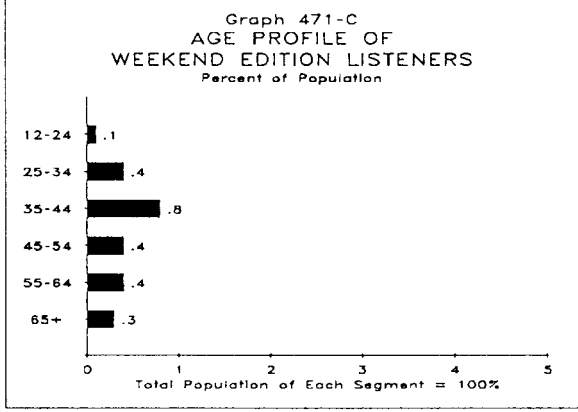
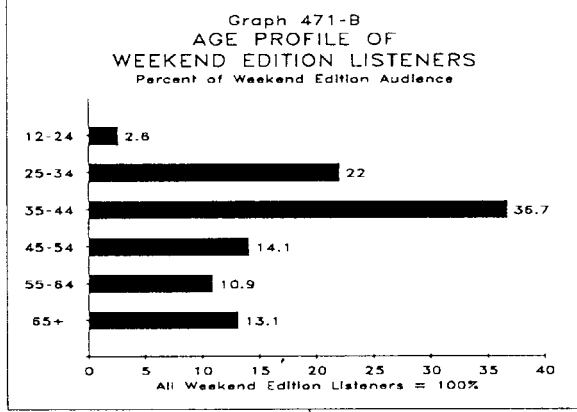
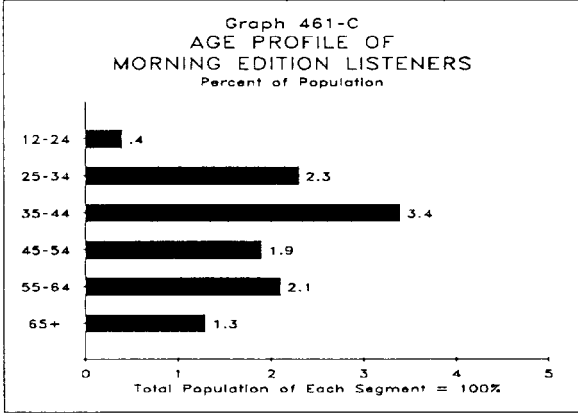
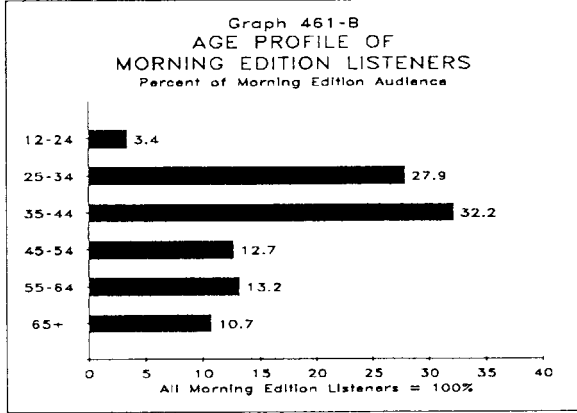
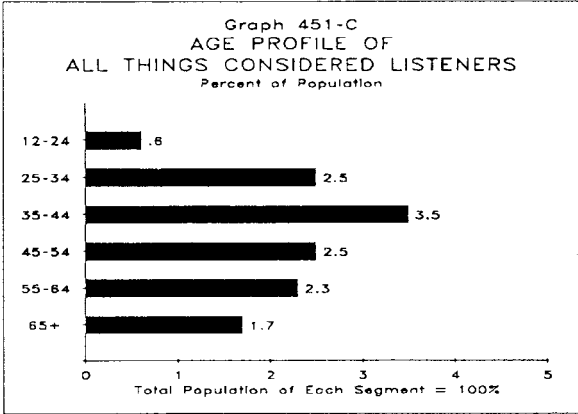
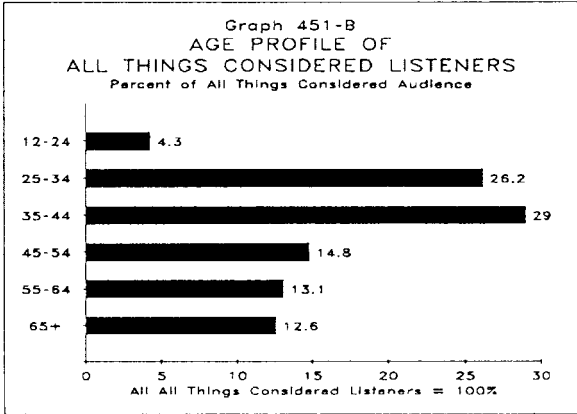
*A Prairie Home Companion*²

While attracting a broad age mix, *A Prairie Home Companion* appeals more to listeners 55 and older than do the other three programs. Thirty percent of the program's audience comprise listeners 55 and older; 27% are 35 to 44 years old. Like *Weekend Edition*, the program appeals slightly more (6%) to women than to men.

¹ At the time the AUDIENCE 88 survey was administered, *Weekend Edition* with Scott Simon had only been on the air for a few months, so data may not truly reflect the program's audience profile.

² At the time the AUDIENCE88 survey was administered, *A Prairie Home Companion* was in live production.





Education

All Things Considered

All Things Considered offers underwriters an exceptional way to reach well-educated individuals. Public radio listeners who have pursued an education beyond college are 24% more likely to listen to *All Things Considered* than are other listeners. The program is listened to by 16% of all Americans who have pursued an education beyond college, and close to half (47%) of its listeners have attended graduate school. Almost three-quarters (72%) have college degrees.

Morning Edition

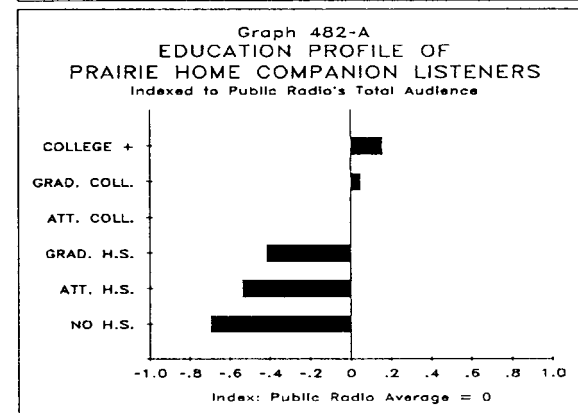
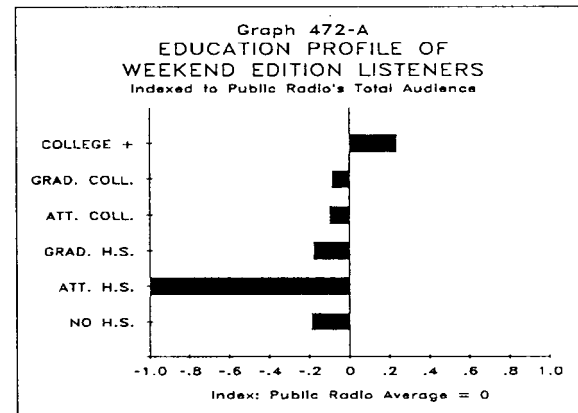
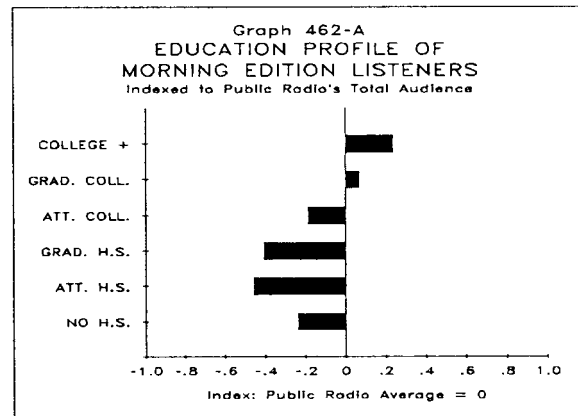
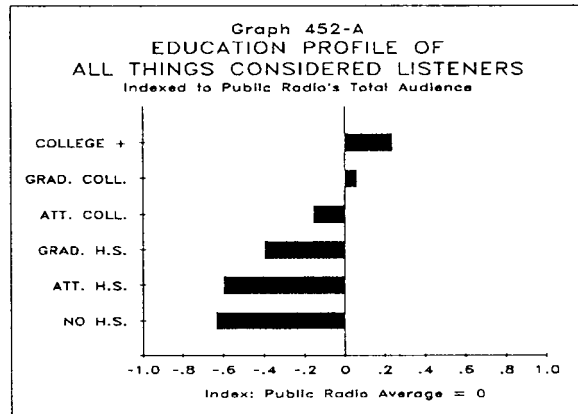
Because the program reaches a slightly smaller percentage (14%) of Americans who have attended graduate school, *Morning Edition* is an underwriter's second best way to reach highly educated listeners on public radio. Like listeners of *All Things Considered*, 47% of *Morning Edition* listeners have pursued an education beyond college, and 72% have college degrees.

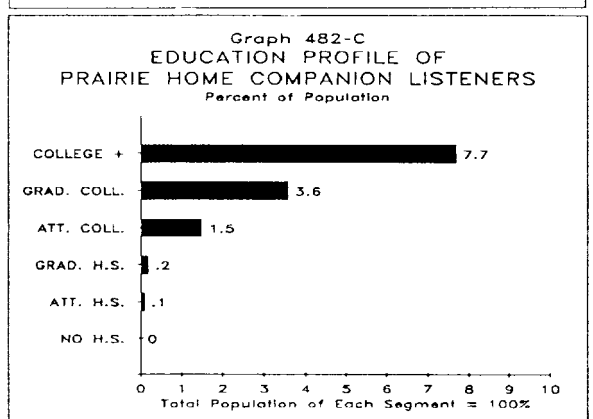
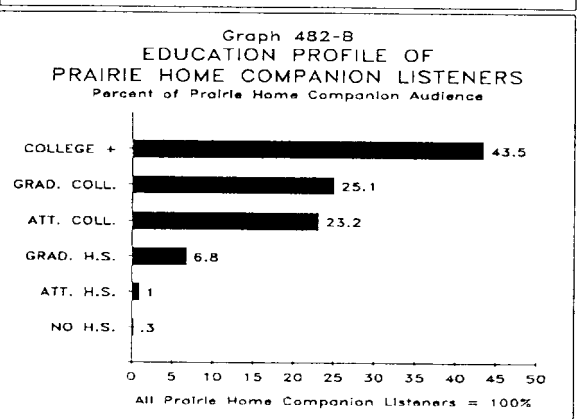
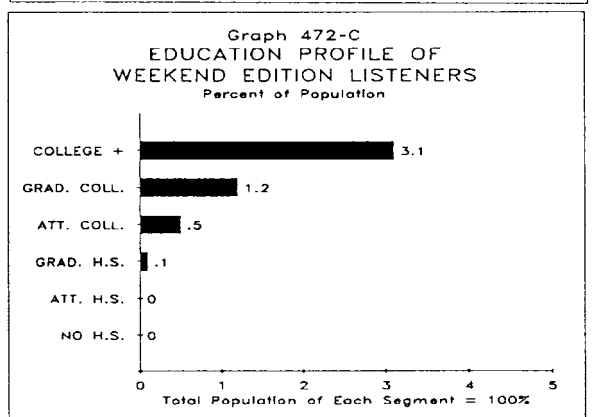
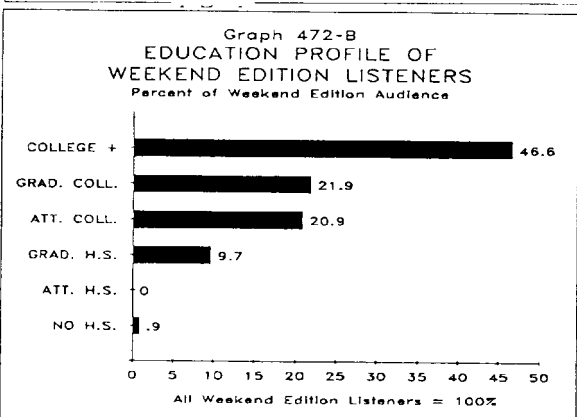
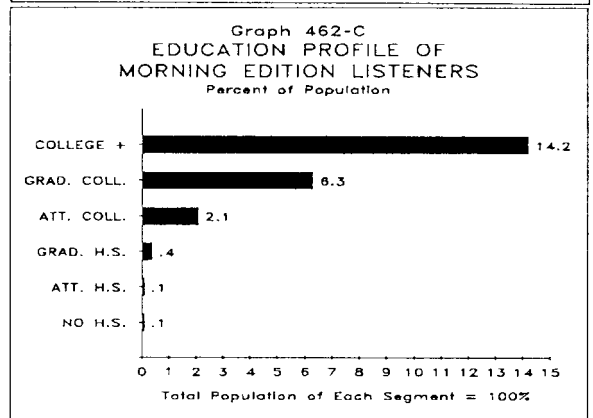
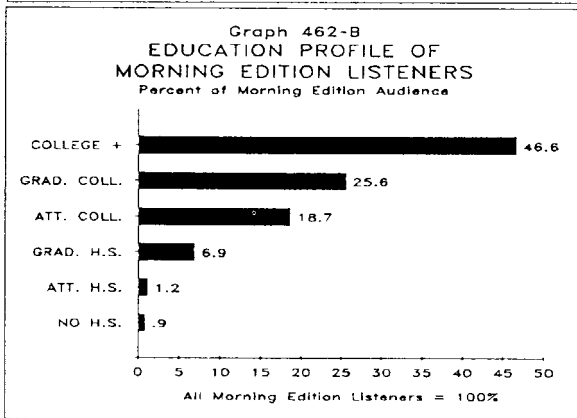
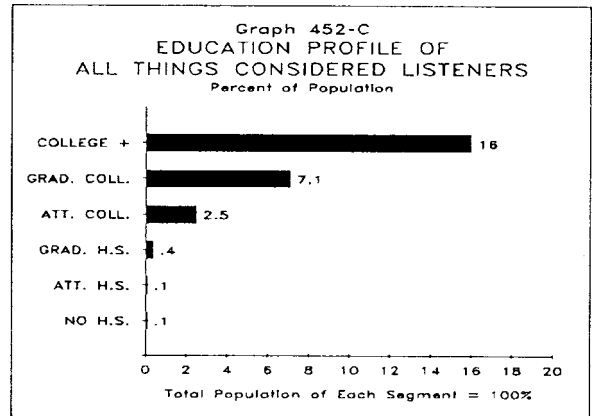
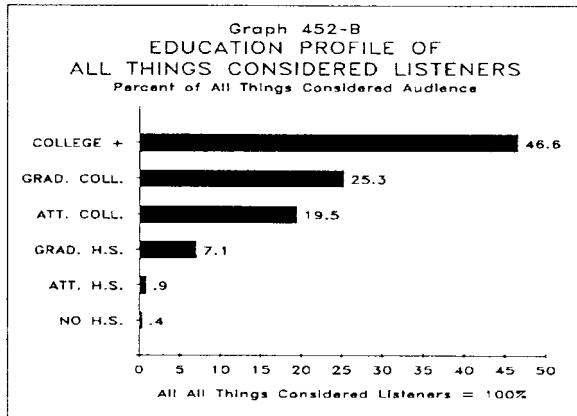
Weekend Edition

Weekend Edition is another program that appeals to highly educated consumers. Like the other two programs, 47% of *Weekend Edition* listeners have attended graduate school, but slightly fewer (69%) have graduated from college. Because of its smaller weekly cume, *Weekend Edition* reaches 3% of this group. But wait — it does that in *only 2 hours a week!*

A Prairie Home Companion

A Prairie Home Companion is also a great way to reach people who have pursued an education beyond college. Eight percent of all Americans who have attended graduate school listen each week. Forty-four percent of the program's listeners have a graduate education and over two-thirds (69%) hold college degrees.





Occupation

All Things Considered

Like information programming, *All Things Considered* is an attractive medium for underwriters wishing to reach people in upscale positions. Public radio listeners who have professional, technical, managerial, or administrative positions are 16% more likely to listen to *All Things Considered* than are other listeners. These individuals represent almost two-thirds (62%) of the program's audience.

Morning Edition

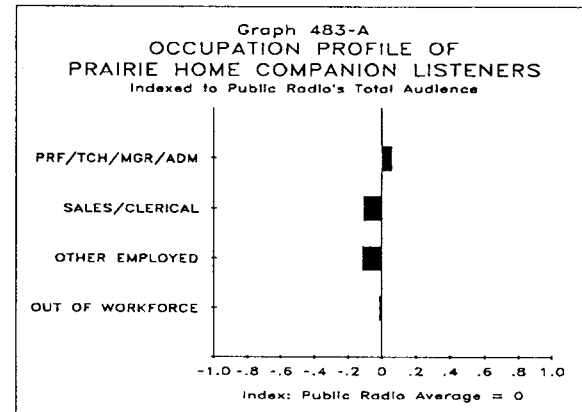
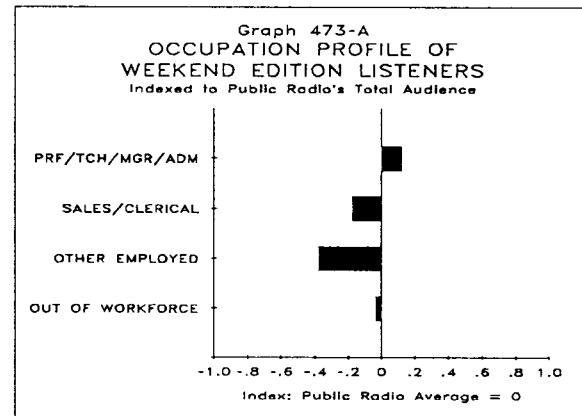
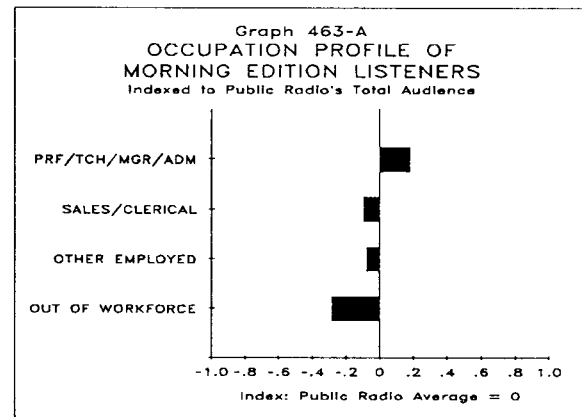
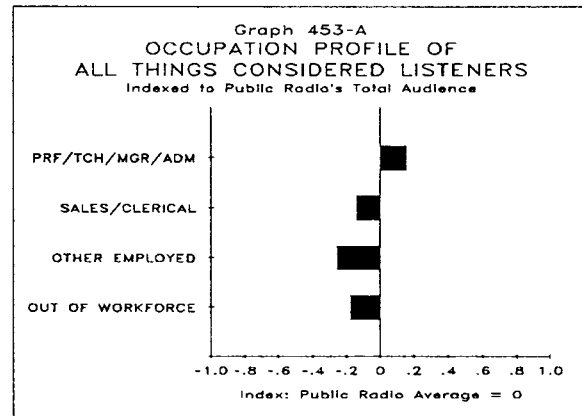
Like *All Things Considered*, *Morning Edition* also appeals to professionals, technicians, managers, and administrators; almost two-thirds (63%) of its listeners hold these top-level jobs.

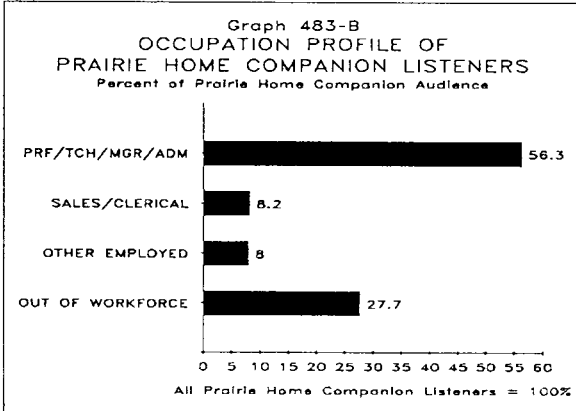
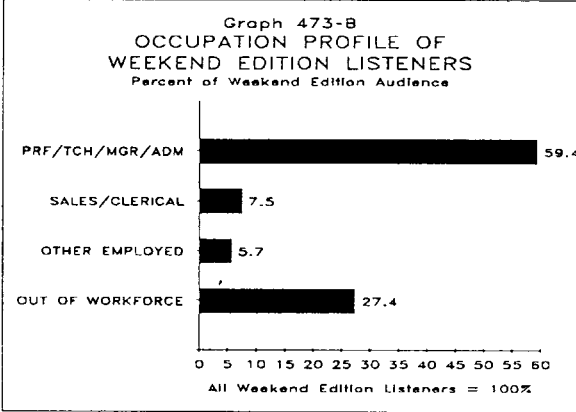
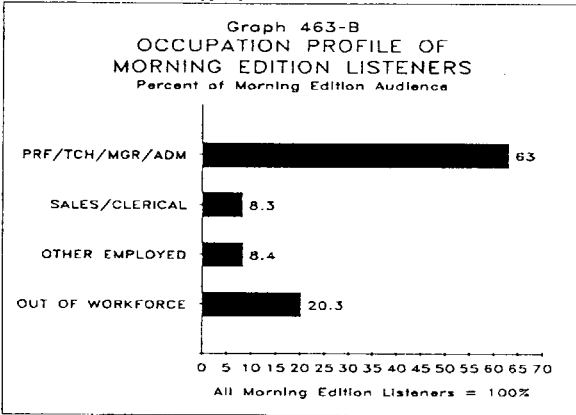
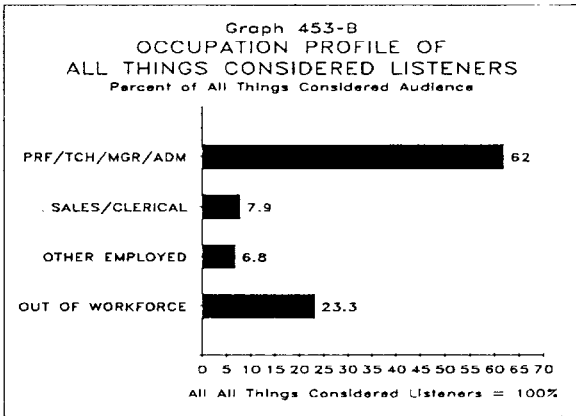
Weekend Edition

The occupation profile of *Weekend Edition* listeners is somewhat similar to the profiles of the other two programs. Sixty percent of its listeners are employed in professional, technical, managerial, and administrative occupations. As with the other two programs, when selling *Weekend Edition* to an underwriter, emphasize the fact that close to two-thirds of its audience are made up of consumers in top-level positions.

A Prairie Home Companion

A Prairie Home Companion ranks fourth among the programs studied in terms of listeners with top-level occupations. Yet, composition is still high at 56%.





Income

All Things Considered

Businesses interested in targeting an affluent market will be impressed with the listeners of *All Things Considered*. The program has a strong appeal to listeners with annual household incomes of \$100,000 or greater; these persons are 17% more likely to listen to the program than are other listeners. Reach and composition may be the best ways to sell *All Things Considered* to underwriters. Over one-fifth (22%) of all Americans with household incomes of \$75,000 or more listen each week. And one in seven of its households has this high income.

Morning Edition

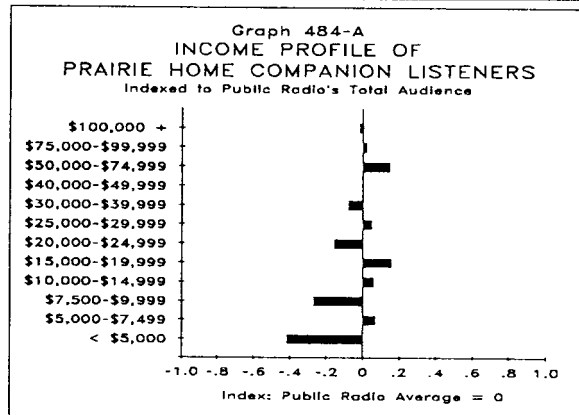
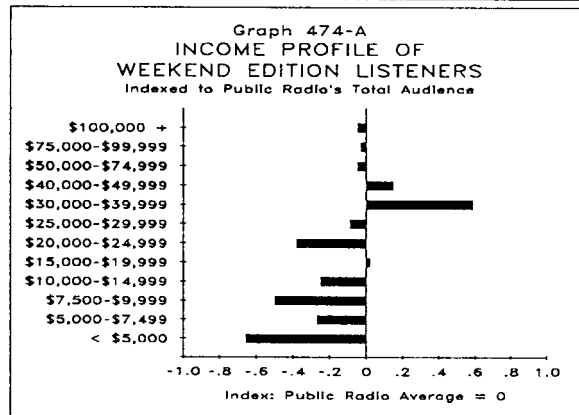
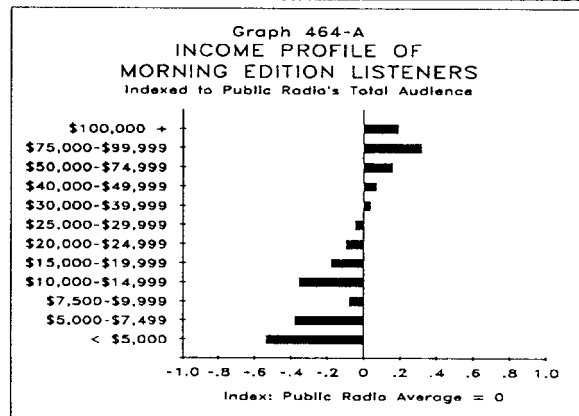
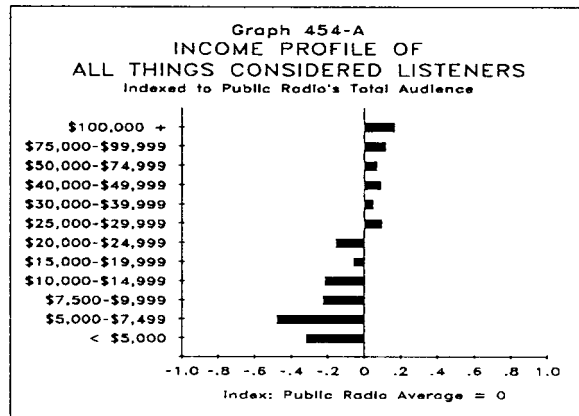
Morning Edition listeners are almost as affluent as *All Things Considered* listeners. One out of five Americans with household incomes greater than \$75,000 listens each week and 15% of the program's listeners live in these high income households. Seventy percent of the program's audience live in households with incomes of \$30,000 and greater.

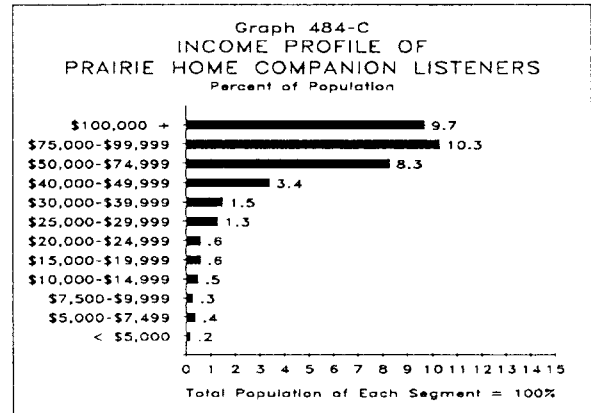
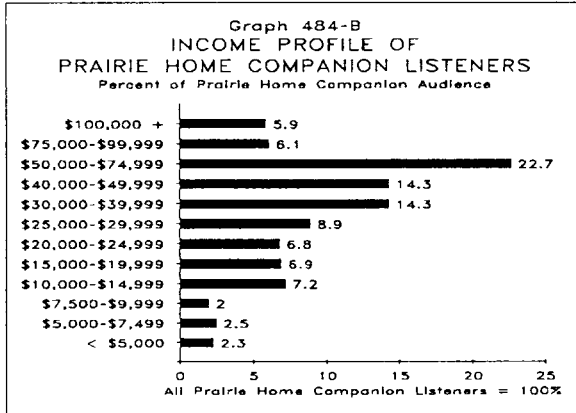
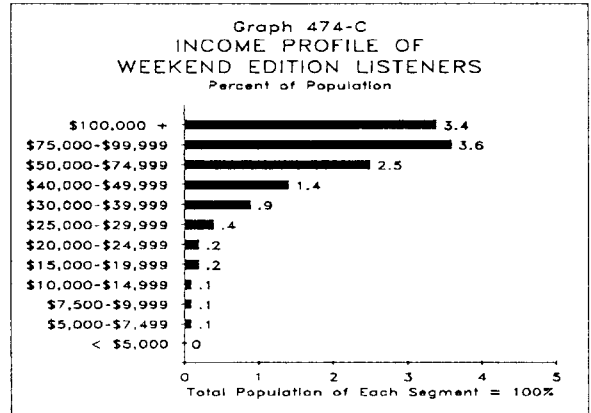
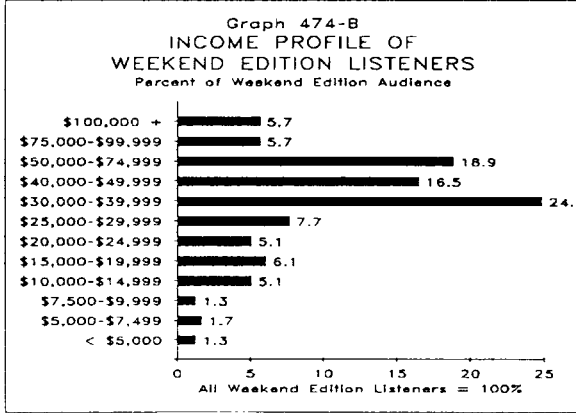
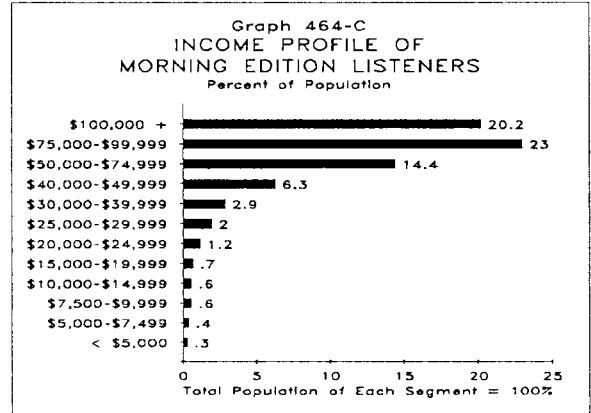
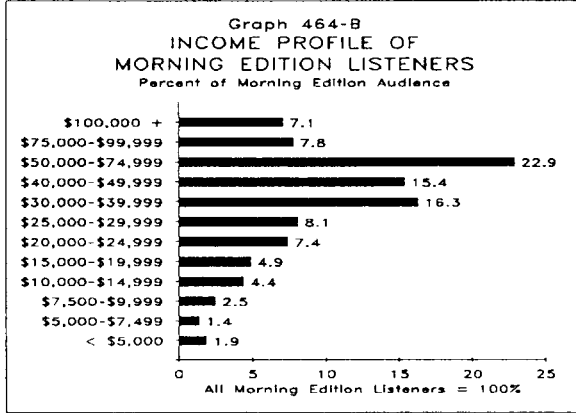
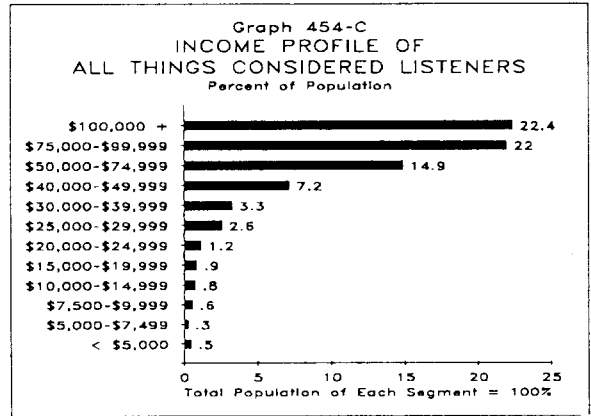
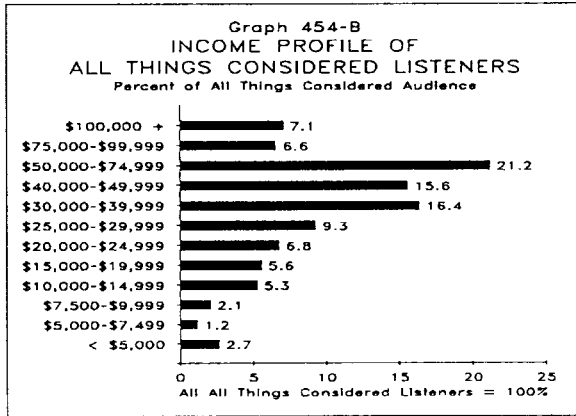
Weekend Edition

Listeners to *Weekend Edition* tend to have slightly lower household incomes. In fact, listeners with household incomes of \$30,000 to \$44,999 are 59% more likely to listen to the program than are other listeners. Fewer (11%) have household incomes greater than \$75,000, but more (72%) have household incomes greater than \$30,000.

A Prairie Home Companion

A Prairie Home Companion tends to appeal to listeners with household incomes across the board, but like most public radio programming, its audience comprises listeners with household incomes of \$30,000 or greater (63%). Its reach into higher income households is slightly greater than that of *Weekend Edition*. One in ten Americans with household incomes of \$75,000 or more listens to the program each week.





Geodemographics

All Things Considered

Underwriters will be impressed with the geodemographic profile of *All Things Considered* listeners. Public radio listeners in the top socioeconomic suburban neighborhoods (S1) are more likely than other listeners to listen to *All Things Considered* each week. The program reaches 7% of all persons in these affluent neighborhoods. Fifteen percent of its listeners reside in S1 neighborhoods — and 44% reside in the top three socioeconomic suburban neighborhoods (S1, S2, and S3).

Morning Edition

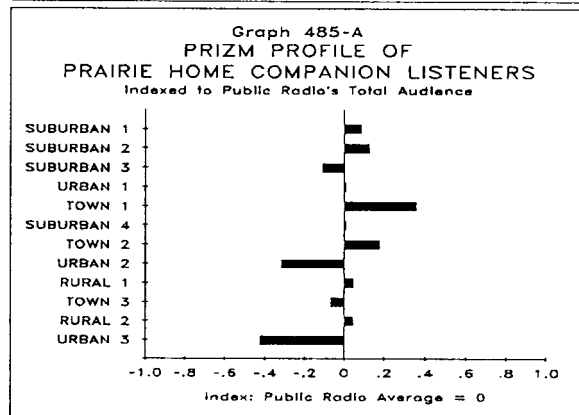
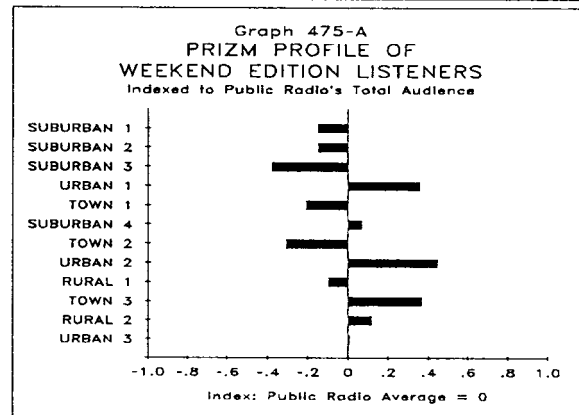
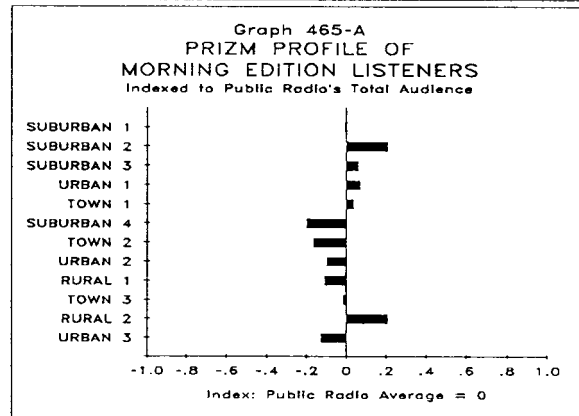
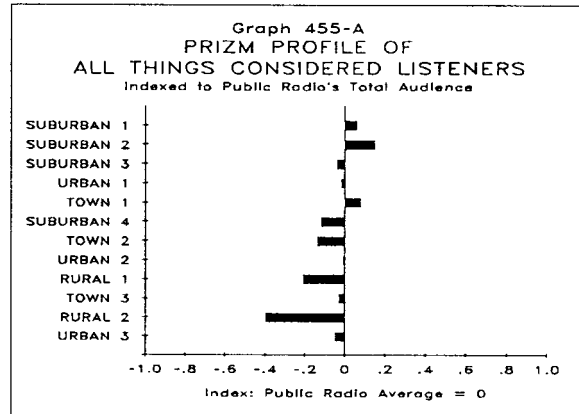
Morning Edition parallels *All Things Considered* in the geodemographic profile of its listeners. Its reach into S1 neighborhoods is 6%. Forty-five percent of its listeners reside in S1, S2, and S3 neighborhoods.

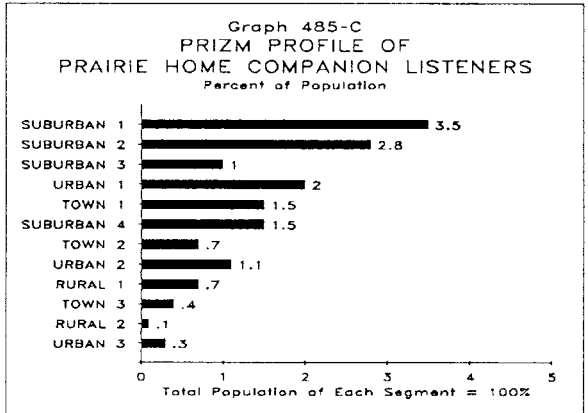
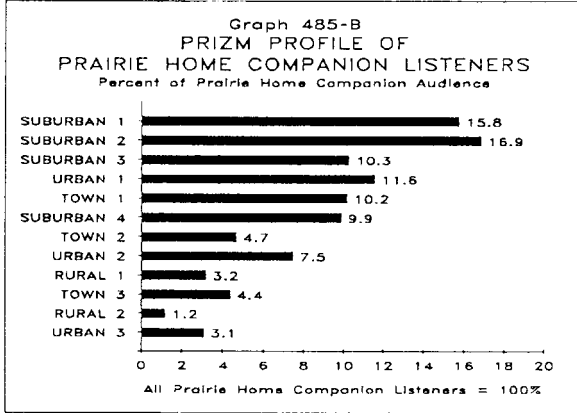
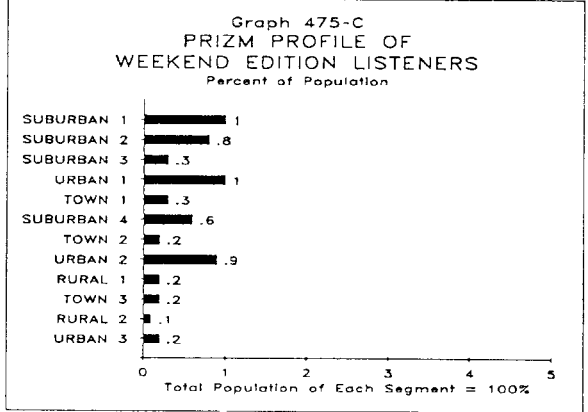
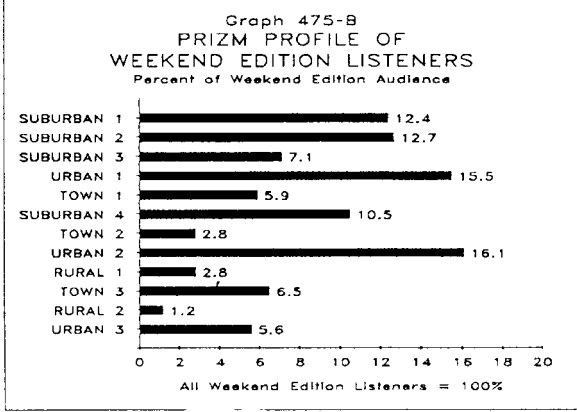
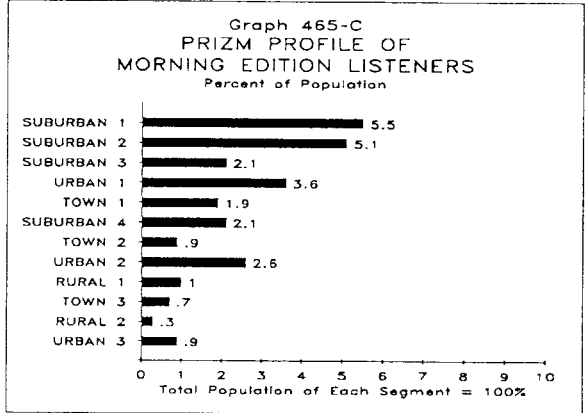
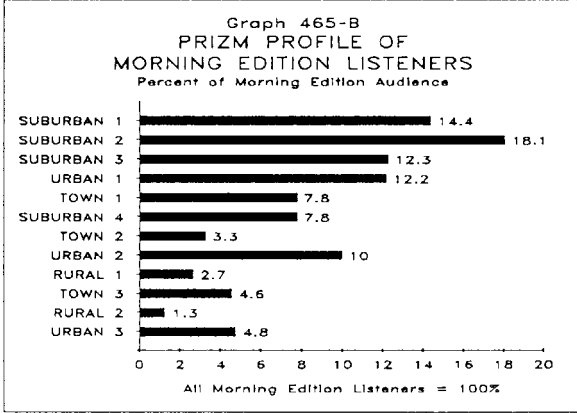
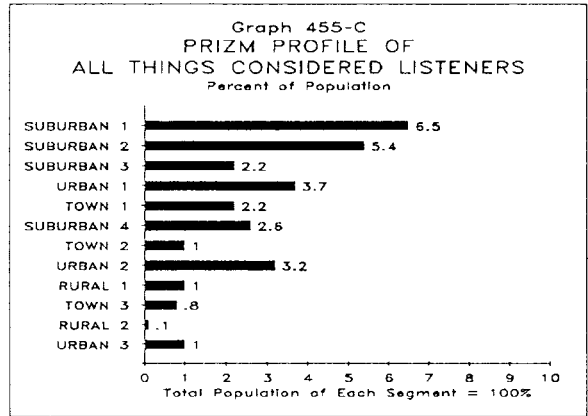
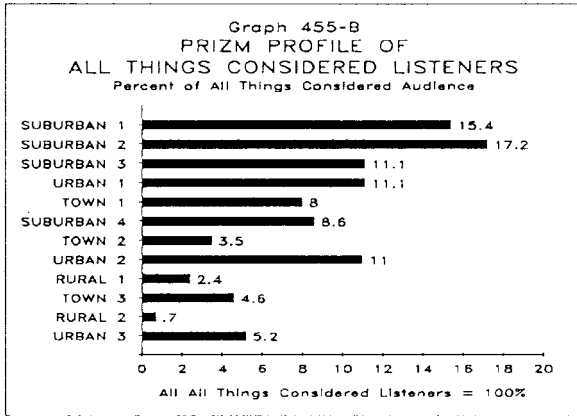
Weekend Edition

Weekend Edition attracts more people residing in urban areas than do the other two programs. Listeners who live in the more affluent urban neighborhoods are 36% more likely to listen to *Weekend Edition* than are other public radio listeners. In fact, one-third (32%) reside in U1 and U2 neighborhoods, with another third (32%) living in the top three socioeconomic suburban neighborhoods. *Weekend Edition* is a good vehicle for underwriters looking for an efficient way to reach middle and upper class individuals residing in both urban and suburban settings.

A Prairie Home Companion

A Prairie Home Companion is similar to *All Things Considered* and *Morning Edition* in terms of audience geodemographics. Forty-three percent of its listeners reside in the top three suburban neighborhoods.





Values and Lifestyles

All Things Considered

Businesses wishing to reach America's Societally Conscious should consider underwriting *All Things Considered*. Public radio listeners who are Societally Conscious are 27% more likely to listen to the program each week than are other listeners. One out of ten Societally Conscious Americans listens to the program each week and over half (53%) of the listeners are Societally Conscious. Businesses can also reach Achievers by underwriting this program. Twenty-four percent of *All Things Considered* listeners are Achievers.

Morning Edition

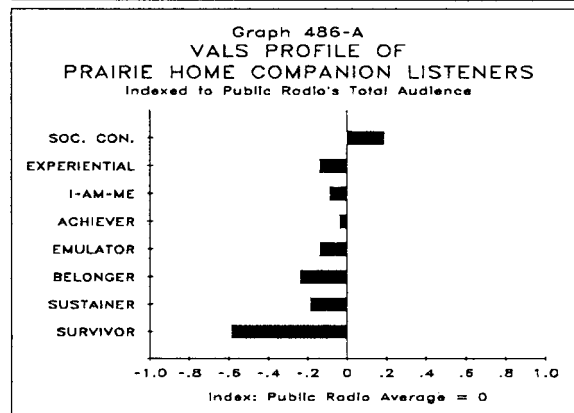
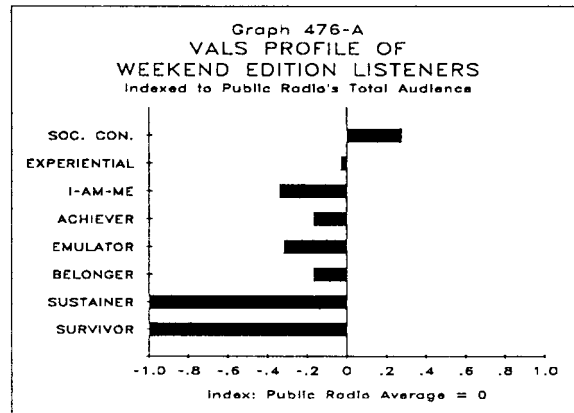
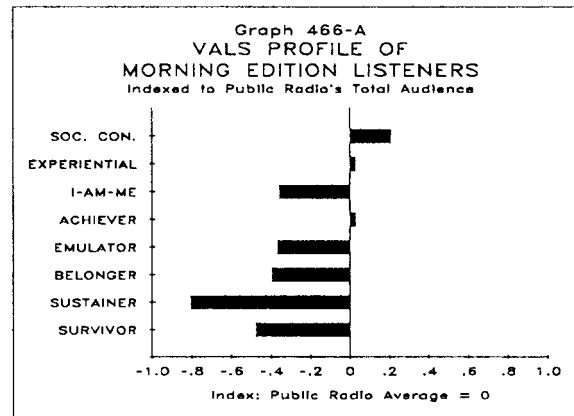
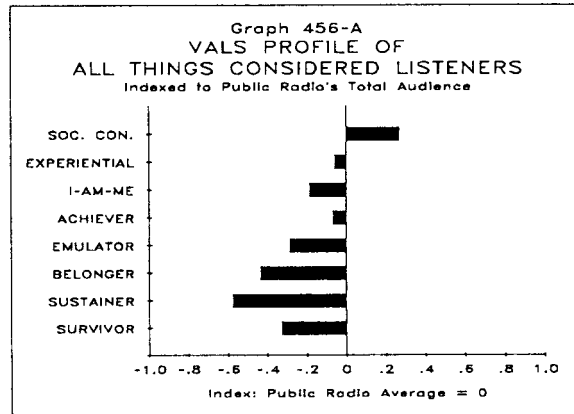
Morning Edition is another program underwriters seeking the Societally Conscious — and Achievers — should consider. Public radio listeners who are Societally Conscious are 21% more likely to listen to this program than are other listeners; Achievers are 3% more likely. Nine percent of all Societally Conscious Americans listen to *Morning Edition* each week. Half (51%) of the program's audience is made up of Societally Conscious persons, and over one-quarter (26%) is made up of Achievers.

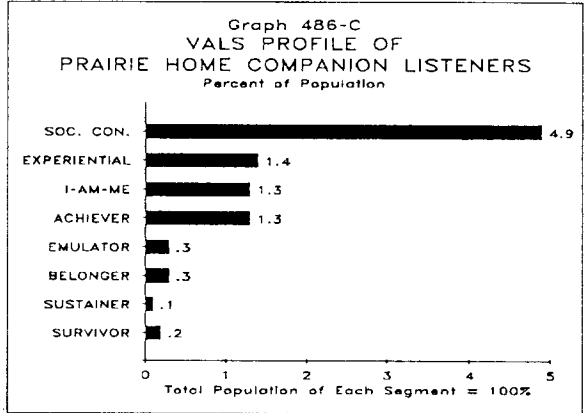
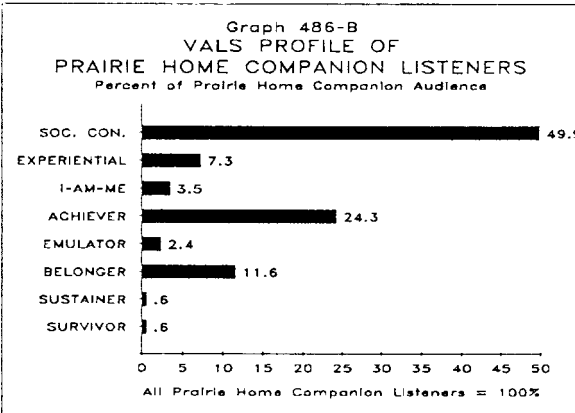
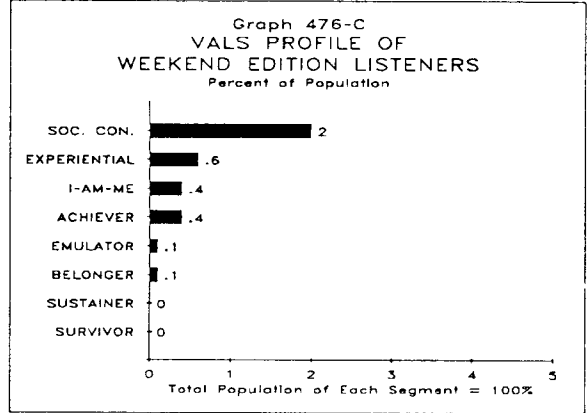
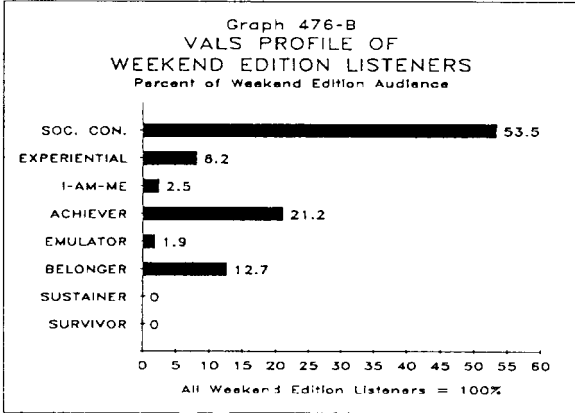
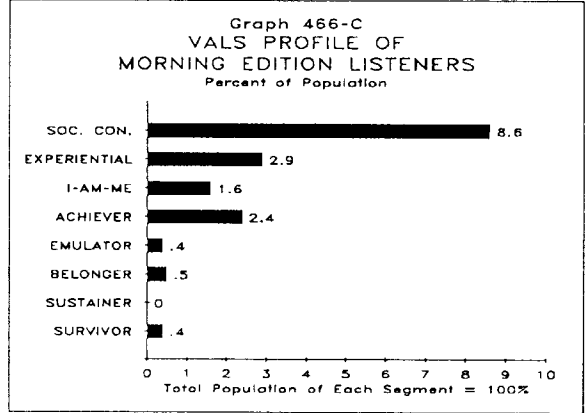
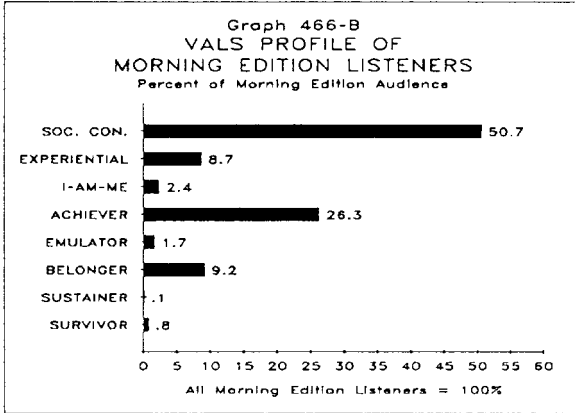
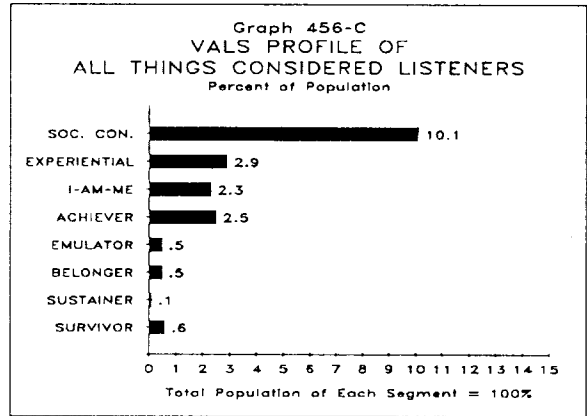
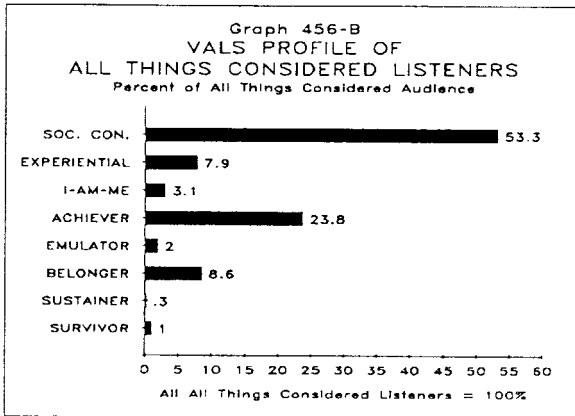
Weekend Edition

The VALS profile of *Weekend Edition* listeners is similar to that of *All Things Considered* listeners. The Societally Conscious make up slightly more (54%) of the program's listeners, and Achievers comprise slightly less (21%).

A Prairie Home Companion

A Prairie Home Companion is similar to the other three programs in that half of its audience comprises the Societally Conscious, and almost one-quarter (24%) is made up of Achievers.





By underwriting public radio programming, your company will...

REACH PROFESSIONALS AND MANAGERS — ACTIVE PEOPLE WITH DISPOSABLE INCOMES

Over one-half of all public radio listeners hold professional, technical, managerial, and administrative positions.

With their high household incomes and top-level occupations, most public radio listeners reside in affluent neighborhoods.

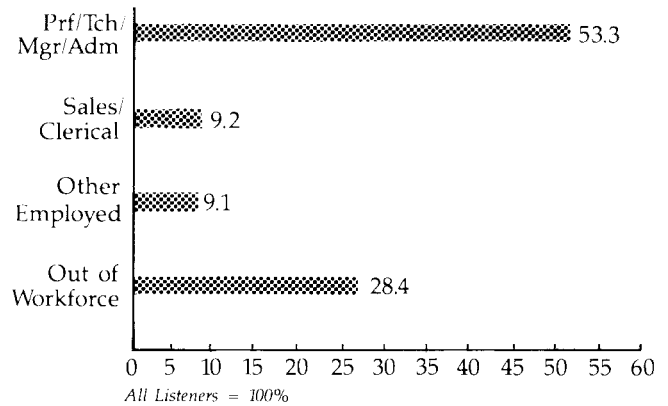
Geodemographic studies show that Americans living in the top socio-economic neighborhoods are 178% more likely than other Americans to listen to public radio each week.

Over one-half of all public radio listeners live in PRIZM's¹ top four socio-economic neighborhoods in the U.S.

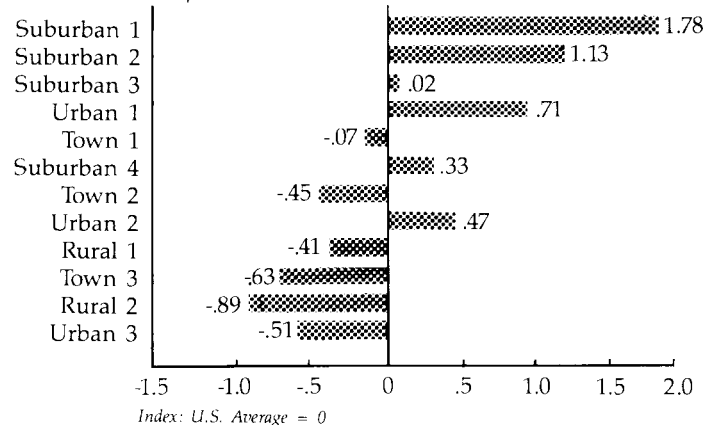
People who live in these neighborhoods are the people who have "made it." They have disposable incomes and invest substantially in their communities, their homes, and their lifestyles.

¹ PRIZM is a registered trademark of Claritas Corporation.

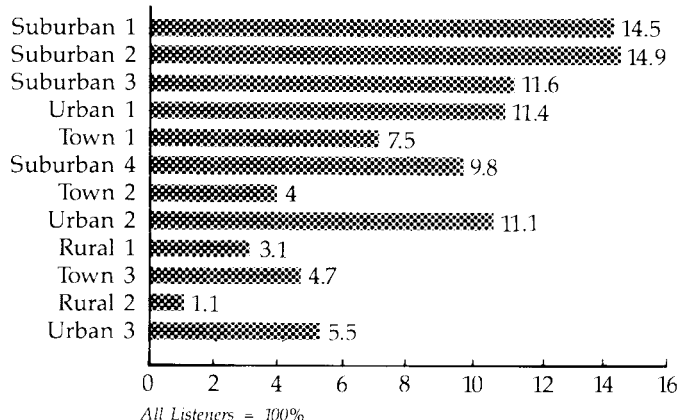
OCCUPATION PROFILE OF PUBLIC RADIO LISTENERS
Percent of Public Radio Audience



PRIZM PROFILE OF PUBLIC RADIO LISTENERS
Indexed to U.S. Population



PRIZM PROFILE OF PUBLIC RADIO LISTENERS
Percent of Public Radio Audience



By underwriting public radio programming, your company will...

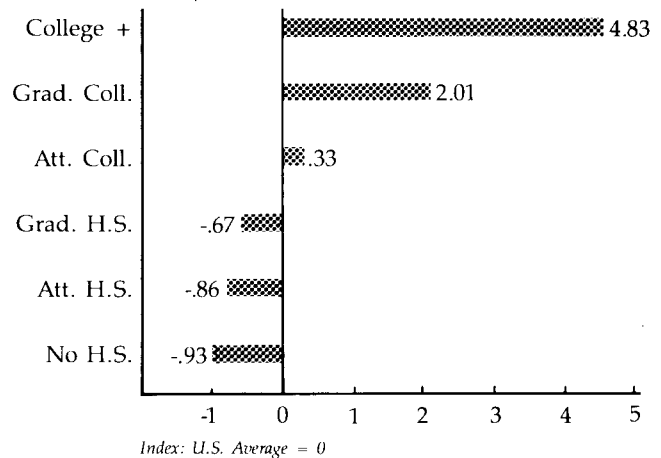
REACH A WELL-EDUCATED MARKET

Public radio listeners are well-educated. People with advanced degrees are 483% more likely than other Americans to listen to public radio each week.

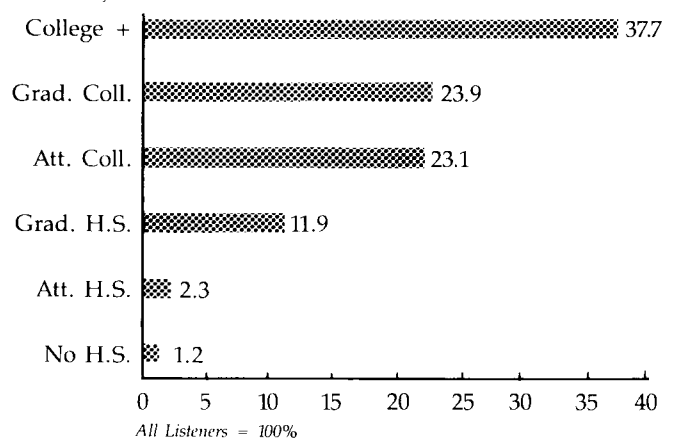
In fact, four in ten public radio listeners have pursued an education beyond college.

One in three Americans with a college degree listens each week to public radio.

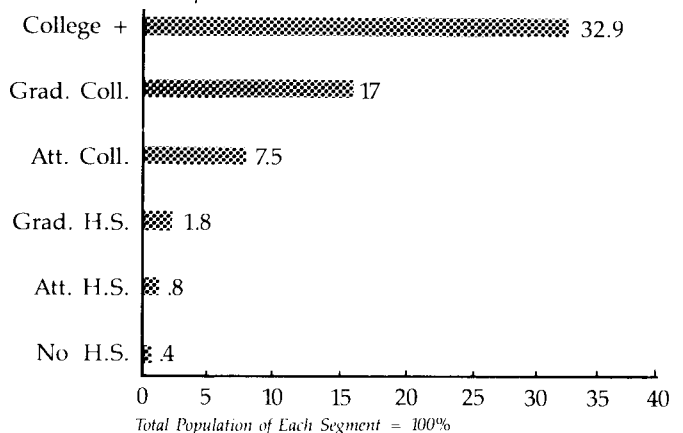
EDUCATION PROFILE OF PUBLIC RADIO LISTENERS
Indexed to U.S. Population



EDUCATION PROFILE OF PUBLIC RADIO LISTENERS
Percent of Public Radio Audience



EDUCATION PROFILE OF PUBLIC RADIO LISTENERS
Reach into U.S. Population



By underwriting public radio programming, your company will...

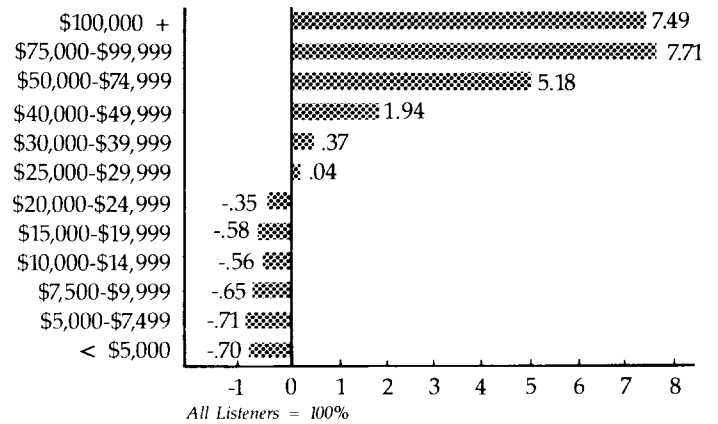
REACH AN UPSCALE MARKET

Public radio listeners are affluent. Americans who have annual household incomes of \$75,000 or greater are 749% more likely than other Americans to listen to public radio each week.

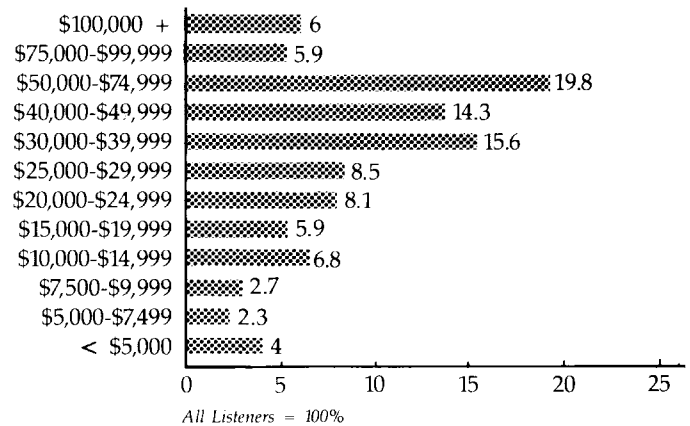
One in eight public radio listeners has a household income of \$75,000 or greater and two out of three reside in households with incomes \$30,000 or more.

Close to half of all Americans with household incomes of \$75,000 or greater listen to public radio each week.

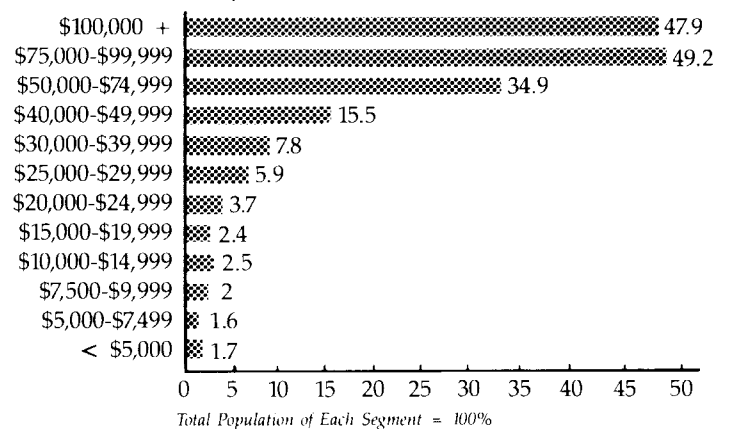
INCOME PROFILE OF PUBLIC RADIO LISTENERS
Indexed to U.S. Population



INCOME PROFILE OF PUBLIC RADIO LISTENERS
Percent of Public Radio Audience



INCOME PROFILE OF PUBLIC RADIO LISTENERS
Reach into U.S. Population



REACH THE PEOPLE WHO MAKE A DIFFERENCE

In today's media-rich society, it's difficult to talk to the *people who make a difference*.

Decision makers, opinion leaders, professionals, and managers are active people — too busy to spend much time with mass media. Because time is important to the people who make a difference, *they select their media with great care*. This makes them one of the *most difficult* groups of Americans to reach.

Yet their educations, high incomes, and influence make them one of the most *desirable* groups to reach. For this reason, the media they do select are *cluttered* with commercial messages vying for their attention.

Enjoy an Uncluttered Message

There is *one medium* listened to by these people that is *not cluttered* with commercial messages — one that *speaks clearly* to this audience and one that provides the information and entertainment they need.

That voice is public radio.

You can *reach* the people who make a difference *efficiently and effectively* by *underwriting* public radio programming.

When you make an underwriting investment, your company receives credit for its support. Your on-air message may include your company name, location, and a brief description of your product or service. Unlike the cluttered environment of commercial radio, *your message stands out and is heard*.

Associate with Quality

In addition to being heard by people who make a difference, you associate your business with quality programming.

Your underwriting investment *builds goodwill* for your organization by demonstrating on air your support of an important public institution.

Four out of five public radio listeners say their opinion of a company is *more positive* when they know the company supports public radio — in part because they believe companies that fund public radio do so because they want to make a charitable contribution to the public interest.

In addition, listeners say that a company's support of public radio *positively influences* their decision to *purchase* that company's products and services.

Public radio listeners are the people who make a difference.

They can make a difference for your company.

Underwrite Public Radio Programming

By underwriting public radio programming, your company will...

REACH THE PEOPLE WHO MAKE A DIFFERENCE

With their college educations, high incomes, top-level occupations, and disposable incomes, public radio listeners can make a difference for your company.

Values and Lifestyles (VALS¹) studies show that the *Societally Conscious* and *Achievers in America* listen to public radio. These are people who are successful — professionally and financially — and enjoy the finer things in life.

The *Societally Conscious* are 256% more likely than other Americans to listen to public radio each week.

Close to half of all public radio listeners are *Societally Conscious* and another quarter are *Achievers*.

Societally Conscious

Demographics

- High incomes
- Professional/technical
- Highest paid women

Consumption

- Compact cars
- Tennis equipment
- Business/pleasure travel
- Natural cheese
- Ethnic foods & ingredients
- Backpacking/hiking equipment
- Photo equipment

Achievers

Demographics

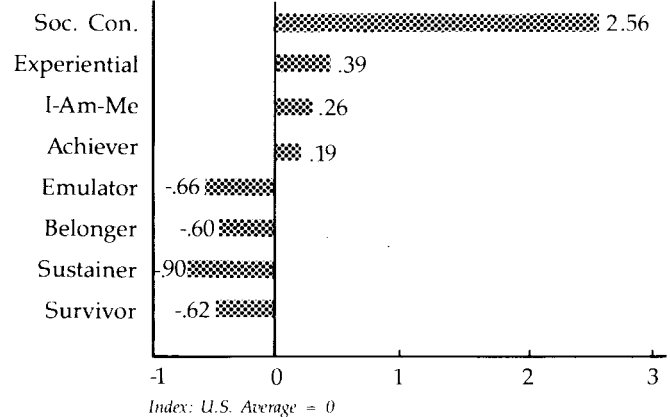
- Highest incomes
- Many managers/administrators
- Predominantly male (58%)

Consumption

- Luxury automobiles
- Recreational equipment
- Business travel
- Hi-tech products
- Frozen vegetables & entrees
- Golf equipment
- High margin gift items

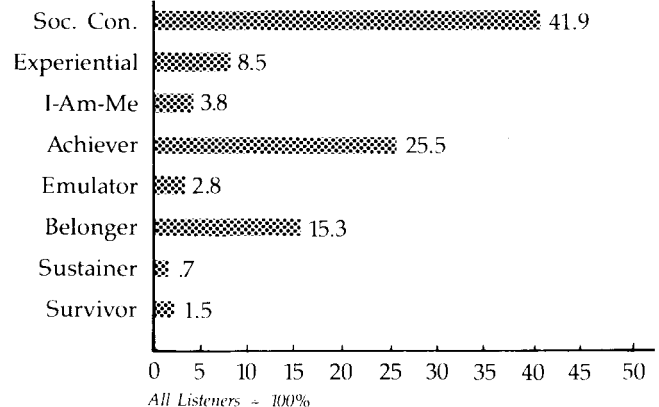
VALS PROFILE OF PUBLIC RADIO LISTENERS

Indexed to U.S. Population



VALS PROFILE OF PUBLIC RADIO LISTENERS

Percent of Total Audience



¹ VALS is a registered trademark of SRI International.