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# FRAMING AUDIENCE 88

by David Giovannoni

*The end of all our exploring  
Will be to arrive where we started  
And know the place for the first time.  
— T. S. Eliot*

AUDIENCE 88 is developing lucid new portraits of public radio's listeners in its five-part series of studies. The "Underwriting" report was published two months ago and other installments will be coming during the next few months. As a participant in the AUDIENCE 88 team, I can tell you that certain results of this study are too powerful to keep under wraps. Here is a preliminary glimpse at some of what we've found.

First, the good news.

Each week about two percent of all Americans over the age of 12 listen to a public radio station more than to any other station. That's four million people whose favorite radio station is a public station.

These are public radio's **core** listeners, and public radio serves them well: they spend two out of every three radio listening hours with their public station.

There's more good news. Each week another eight million people tune in to a public station and listen for at least five minutes. These **fringe** listeners find something worth listening to on public radio, even though they spend six hours with commercial radio for every hour they spend listening to public radio.

Now the best news. Over a year's time, public radio captures the attention of another six percent of all Americans for five minutes or more. These 13 million **samplers** check in to public radio's audience less frequently than once a week, and therefore are not likely to be captured in Arbitron's weekly cume estimates. Because they tune in and listen every so often, samplers know that public radio exists; they even have a good idea of what it offers; still, they spend the vast majority of their radio time listening to commercial radio.

Adding up samplers, fringe listeners, and core listeners, we find that public radio enters the lives of roughly 25 million Americans over the age of 12 each year.

This leaves 175 million Americans who **do not** use public radio. To be fair, around 35 million **cannot** listen because they live beyond a public station's signal. But this means 140 million Americans **can** listen to public radio — **but choose not to**.

That's bad news, but here's even worse: **You couldn't pay these people to listen to public radio.** Well, maybe you could pay them, but once the check clears they'd start listening to something else again.

## Don't Panic

Public radio is not alone. Virtually **every** radio station serves a loyal core of listeners well and a listening fringe to some lesser extent; and while many people sample the station over long periods of time, most won't want to listen to it — ever.

In this sense a public station is no different than any other station with any other format. The illustration shows listening to public radio in black and listening to all other radio in white. But it can just as accurately represent listening to contemporary hit radio, classic rock, or country stations. The proportions of core listeners, fringe listeners, and samplers — and the relative time they spend listening to the format — will remain much the same. (The only thing that might change is the absolute size of the “listeners” box, which would get larger for formats with a wider popular appeal and smaller for formats with narrower popular appeal.)

The fact is that every radio station — bar none — has a **core audience** composed of a **certain type** of person. But just because listener **patterns** are the same across formats — with every format having a core, fringe, and sampler element — that doesn't mean that **listeners** are the same across formats. Far from it.

Consider your own observations. Is the core country listener a different kind of person than the core classical listener? Is either different than the core classic rock or core contemporary hit radio listener? Of course they are: Different types of people like different types of radio programming.

The number and types of people in these core audiences vary across formats, stations,

and markets. Yet one thing remains the same — a commercial station succeeds when it serves a large and commercially desirable core audience well. It attracts this core by embracing its listeners' values and lifestyles. In short, the station develops an attitude. This attitude drives the music it plays, the information it selects, the way personalities talk, the topics they choose, the words they use, the jokes they make (if any) — **everything** purposely coincides with the values and lifestyles of a well-defined and well-understood core audience.

## Public Radio's Attitude

While public radio may differ in its intent, it too has a core audience brought to it by the attitude inherent in its programming. Public radio has maintained a distinct attitude about itself and its listeners for decades: being “intelligent” is an attitude; being of the “highest quality” is an attitude; “reflecting the highest achievements of our culture” is an attitude; making lofty ideas and ideals accessible to all interested Americans is also an attitude.

Public broadcasters create and choose their programming based on how well it meshes with public radio's attitude, or “mission.” People who choose to listen to our programming share this attitude; the attitude that makes them listen also sets them apart from others.

AUDIENCE 88 makes it clear that people who are attracted to public radio are different from people who are not; people who listen more to public radio are different from people who listen less; people for whom public radio is the station of choice are quite different from other Americans.

**Programming causes these differences.** Indeed, different formats **within** public radio serve different types of people. People don't listen out of some altruistic concept that public radio is a cause or a public good; they listen — and contribute money — because public radio's programming speaks to their values, in their language, in terms that fit their lifestyles, their attitudes.

AUDIENCE 88's working premise is that public radio can better serve the public and itself by understanding the alliances between various programming options and the different types of listeners each option benefits. It explores programming, advertising, promotion, membership, system development, and planning strategies in this clear and concentrated light. This exploration delivers us back to where we started, but we are not unchanged.

The AUDIENCE 88 project is funded by the Corporation for Public Broadcasting. Linda Liebold, Terry Clifford, Tom Thomas, and I make up the AUDIENCE 88 team. We will release the "Programming" and "Advertising and Promotion" volumes in June. A newsletter previewing the findings in these studies will be crossing your desk within the next

few days. (If it doesn't, ask your station manager, program director, or promotion director to loan you their copy.)

We will complete this series of portraits this summer when we publish the "Membership" and "Issues and Implications" reports.

In addition, the four of us will talk about these studies at several sessions at the Public Radio Conference in St. Louis.

All AUDIENCE 88 materials are mailed directly to stations as they are released. Extra copies of all reports will be available from CPB's Publication Office upon the project's completion this summer.

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

**FACT:** Three-quarters of a million people each minute; five million people each day; twenty-five million people each year listen to public radio's programming.