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## **Doubling Public Radio's Service to the Public**

*(11 pages)*

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## DOUBLING PUBLIC RADIO'S SERVICE TO THE PUBLIC

### 1. Introduction

Can the audience for the system of **NPR** member stations be doubled in the next five years? Is this a realistic, yet challenging, rate of growth?

These are questions asked by **NPR's** Board of Directors when, at its July 17th meeting, it addressed the issue of establishing a goal for national audience growth.

This Research and Evaluation report examines the idea of system audience growth. It establishes rates at which public radio's listenership might increase in order to double in five years; through various analyses, it explores the feasibility of these rates of growth, and concludes that **an audience increase of this magnitude in this period of time is possible, but only if the entire public radio system adopts and acts on it as a primary goal.**

There exist various proven strategies which public radio might adopt to achieve this goal. This evaluation stops short of examining specific ways in which public radio could increase its service to the public; it does, however, lay the foundation for the systemwide discussion of audience growth goals and the planning of service-enhancing strategies.

### 2. The Rationale For Increasing Audience Service

An outline of the rationale for increasing public radio's audience defines the framework in which options can be evaluated later on in this report. We assume there are at least two broad reasons why public radio need be concerned with substantially increasing its service to the public.

The first is **mission**. The degree to which public radio serves the public can be measured, in part, by the number of people actually using it. Most Americans **can** listen to at least one NPR member station; but the degree of public service is more appropriately measured by the number of people who **do** listen to at least one member station.

But if public radio ceases to exist, it cannot serve the public. **Survival**, therefore, is the second reason why public radio needs to be concerned with substantially increasing its public service. It costs money to serve the public, and each of public radio's four major sources of revenue is directly concerned with how well the public is served:

1. Federal, State, Local (Tax-based) Support
2. Institutional (Licensee) Support

The number of people using the pub-

**lic radio system (or any public radio station) is a direct measure of public service.** Support from license-holding, as well as federal, state, and local institutions, is often and increasingly tied to such public service indicators.

### 3. Underwriting Support

**The value of air time is a direct function of the number of people listening to the station or the system of stations.** Underwriters appreciate public radio's non-commercial nature, but they are increasingly concerned with the effectiveness of the medium and the value of their underwriting dollar.

### 4. Listener Support

**Audience support is a direct function of the number of people using the service.** In the words of radio researcher Gary Bond, "You can't pick a guy's pocket if you can't reach his pants."<sup>1</sup>

In an environment of increased competition for institutional funds, advertising (underwriting) dollars, and radio audiences, public radio must at least **maintain** service to its existing audience if it is to survive. And if public radio is to further its mission, it must **enhance** its service to the public.

## 3. CUME OR AQH?

All broadcasters have a choice of strategies which yield more listeners. These strategies are often broken down into those which build cume and those which build AQH listening.

Some experts argue that this is a false dichotomy — that cume and AQH audience are built together; a station which increases its cume audience builds (by mathematical necessity) AQH audience, and a station which in-

creases its AQH audience also increases its cume (due to reasons explained in Section 3.2).

This argument is, of course, true. But it misses the point: while all audience building strategies are designed to increase the number of listeners to a radio service, some strategies build audience by **concentrating** on AQH and some strategies build audience by **concentrating** on cume.

Since 1972, when the national audience was first estimated from Arbitron data, public radio has been concentrating on its cume audience — and understandably so. Since it reports the number of different persons who listen to a public radio station for at least five minutes during a typical week, the cume is a very appropriate measure of service to the public. It has been especially important in tracking public radio's expansion. Another reason for its use is less altruistic but just as real — the cume number is typically 10 to 30 times larger than the AQH number.

For these and other reasons, the size of the cume audience remains an important measure of audience service. But so is the size of the AQH audience. Whereas the cume reports the use of public radio over a period of time, the AQH estimate reports the use of public radio at any given time.

An examination of the current state of public

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<sup>1</sup> Research recently completed by Audience Research Analysis for the CPB puts a finer point on the relationship between use and support of public radio. It shows that a person becomes more likely to support his or her public radio station (1) the more time s/he spends listening to it, (2) the more **regularly** s/he tunes in, and (3) the more s/he depends on it in relation to all other radio stations used. Refer to Public Radio Listeners: Supporters and Non-Supporters (sent out this month by the Development Exchange).

broadcasting and the environment in which it works clearly demonstrates that public radio is much more capable of implementing strategies which concentrate on the building of its AQH audience. **Strategies which increase AQH audiences are the most affordable, practical, effective, efficient, and appropriate strategies public radio can adopt to increase its service to the public.**

Indeed, **strategies which build cume audiences are strategies which public radio cannot afford — either financially or programmatically.**

### **3.1. Concentrate On AQH For Financial Reasons**

The simplest and most direct way to build cume audience is through advertising. Audiences can be “bought” with advertising which entices persons to tune in the station. But the price of tune-in advertising is steep.

In major markets, it is not unusual to find commercial stations spending hundreds of thousands of dollars per year on promotions and advertising. In the end, successful commercial stations can recoup this investment by raising the cost of their own air time to other advertisers. Even if public radio could afford to spend hundreds of thousands of dollars in each market on tune-in advertising intended to build cume, its funding structure would not allow it to realize an equivalent return on its advertising investment.

In the end, no amount of advertising can directly improve public radio’s product — programming.

### **3.2. Concentrate On AQH For Programmatic Reasons**

**Strategies which increase AQH audiences are not only the most affordable, they are**

**also the most effective, efficient, appropriate, and do-able strategies public radio can adopt to increase its service to the public.**

For example, **strategies which increase AQH audience are primarily those which improve programming accessibility.** Promoting forward, enhancing continuity, programming consistently, honing presentation, unifying appeal — these are just a few of the many, many ways in which attention to programming can improve audience flow, encourage repeat tune-in, and make the service more important to the listener. These strategies make the station more accessible, and result in a greater number of listeners using the station at any given time.<sup>2</sup>

In this way, **AQH-building strategies directly enhance the accessibility of public radio’s programming.** They cost little (or nothing) to implement — requiring only intelligence, care, and skill in execution.

In addition, concentrating on AQH instead of cume serves both mission and survival purposes discussed in Section 2. Either audience estimate (AQH or cume) can be used to measure how well the public service **mission** is being served. **However, underwriting support and audience support are directly tied to the size of the AQH audience — not the size of the cume.**

Indeed, increasing the average number of persons listening will simultaneously increase the number of people using the station or system over time. In other words, **strategies which build AQH audience also build cume audience.** All available stations — both commercial and public — are constantly being sampled by

<sup>2</sup> For a discussion of programming accessibility and its importance to public radio, refer to Research & Evaluation (June 1985), “Availability

## Rates Of Audience Growth

The following two tables show possible rates of growth necessary for public radio to double its national AQH audience between 1984 and 1989.

**Table 1**

### National AQH Growth Schedule A

#### Constant Rate Of Increase Compounded Annually Over Five Years

YEAR	AQH PERSONS	ANNUAL RATE OF GROWTH
1984	500,000	--
1985	575,000	14.9%
1986	660,000	14.9%
1987	760,000	14.9%
1988	875,000	14.9%
1989	1,000,000	14.9%

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**Table 2**

### National AQH Growth Schedule B

#### Constant Number of Persons Added Annually Over Five Years

YEAR	AQH PERSONS	ANNUAL RATE OF GROWTH
1984	500,000	--
1985	600,000	20.0%
1986	700,000	16.7%
1987	800,000	14.3%
1988	900,000	12.5%
1989	1,000,000	11.1%

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and Accessibility.”

potential listeners; people are frequently tuning across the radio dial in search of programming which best meets their needs. As a public radio station increases its service to existing listeners (which it must do in order to increase its AQH audience), it becomes more attractive to people who tune across it. More people who sample it will stay with it.

In short, **the better a station sounds, the more likely it is to turn chance listeners into regular listeners.**

#### 4. Increasing Audience Service: How Much? How Quickly?

When first proposed almost a year ago, the goal of audience growth was to double the national audience in five years. The intent behind this

goal is much more important than the specific amount of audience increase or the period of time allotted; but a “doubling in five years” is a good place to start the examination of how much public radio can expect to increase its audience, and how quickly it can hope to do so.

For public radio to double its audience in a five-year period, the number of listeners has to increase at an annual compounded rate of almost 15%. Schedule A (opposite page) shows how the audience would increase under this constant rate of growth. While the **rate** of growth would remain constant, the **number** of AQH persons added each year would increase from 75,000 in 1985 to 125,000 in 1989.

An alternative method is simply to figure that public radio needs to increase its AQH audi-

**Table 3**  
**Rates Of National AQH Audience Growth**  
**1976 To 1984**

YEAR	AQH PERSONS	Annual Rate Of Growth		
		COMPARED WITH PREVIOUS YEAR	COMPOUNDED FROM 1976	COMPOUNDED FROM 1980
1976	127,000	--		--
1977	179,000	40.5%	40.5%	
1978	201,000	12.3%	25.8%	
1979	237,000	17.9%	23.1%	--
1980	260,000	10.1%	19.6%	--
1981	343,000	31.7%	22.0%	31.7%
1982	465,000	35.7%	24.1%	33.7%
1983	506,000	8.8%	21.8%	24.9%
1984	503,000	-.5%	18.8%	17.9%

SOURCE: Arbitron Nationwide Reports, M-S 6A-12M

ence by 100,000 persons per year. Schedule B (page 4) shows how the audience would increase under this rate of growth. While the **number** of AQH persons added each year would remain constant, the **rate** of annual growth would decrease from 20% in the first year to 11% in the last.

Either scheme would yield one million AQH persons in 1989. Measured by the number of people being served by public radio, the payoff from the second schedule comes sooner than the payoff from the first; however, the second requires a much greater immediate effort.

Are growth rates of 11% to 20% per year realistic? There are several ways to examine this question.

#### 4.1 Comparisons With Past Rates Of Growth

Table 3 displays national audience growth since 1976.

The average compounded rate of growth from 1976 to 1983 was 21.8%. In other words, during this seven-year period, the AQH audience for the system of NPR member stations increased at an **average** annual rate of 21.8% per year.

Similarly, the average compounded rate of growth from 1980 to 1983 was 24.9%. Even extending through 1984, a year of audience loss, the average annual rate of growth was 17.9%.

But these long-term averages conceal the fact that, since 1982, the rate of national audience growth has been seriously attenuated, and in no way approaches the 15% to 20% needed in 1985 to put the public radio system on an audience-doubling course.<sup>3</sup>

A good year is needed in 1985 to offset this stagnation.

#### 4.2 Predictions For 1985's National Audience

Tom Church of the RRC has estimated that, this year, the national audience for NPR member stations will increase around 10%. This would place the weekly cume audience around nine million, and the AQH audience around 550 thousand (see Table 4). He bases his estimate on (as yet) non-aggregated Spring 1985 data for most member stations.

Another educated guess comes from the mathematical model created for the "Availability and Accessibility" report.<sup>4</sup> The model estimates the amount of listening to the system of NPR member stations based on 1) the amount of listening to FM radio, 2) the number of NPR member stations at the time of the sweep, and 3) the average number of seams for the stations in the PRAP sample.<sup>5</sup>

The model predicts that the continued listening shift towards the FM band is helping public radio. RADAR's Spring 1985 estimate shows that 70.6% of all radio listening in America is to stations on the FM band. This factor alone is expected to add 250,000 cume persons and 16,000 AQH persons over the NPR member system's 1984 levels.

<sup>3</sup> Between 1982 and 1984, the average annual rate of growth was 4.0%. At this rate, public radio might double its audience in 18 years.

<sup>4</sup> Research and Evaluation, June 1985.

<sup>5</sup> The PRAP sample is a reliable cross section of member stations used to generate national program and format audience estimates.



**Table 4**

**Prediction Of 1985 National Audience  
10% Growth Model**

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SOURCE	CUME PERSONS	AQH PERSONS
1984 AUDIENCE	8,210,000	500,000
10% RATE OF GROWTH	+ 821,000	+ 50,000
1985 AUDIENCE	9,031,000	550,000

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GUESS BASED ON OBSERVATION OF SPRING/FALL TRENDS

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**Table 5**

**Prediction Of 1985 National Audience  
Availability And Accessibility Growth Model**

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SOURCE	CUME PERSONS	AQH PERSONS
1984 AUDIENCE	8,210,000	500,000
FM LISTENING SHIFT	+ 250,000	+ 16,000
MORE MEMBERS	+ 210,000	+ 10,000
BETTER PROGRAMMING	+ 780,000	+ 68,000
1985 AUDIENCE	9,450,000	594,000

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GUESS BASED ON AVAILABILITY AND ACCESSIBILITY MODEL

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The model predicts that each station added to the system will increase the national cume audience by 8,000 persons, and increase the national AQH audience by 400 persons. Twenty-seven stations were added between 1984 and 1985; the model expects these stations to add 210,000 cume persons and 10,000 AQH persons to the system.

If every member station were to drop one macro seam from its weekly program schedule, the model predicts that the national cume audience will increase 195,000 persons and the AQH audience will increase 17,000 persons. Preliminary estimates indicate a significant drop in the number of macro seams in stations' program schedules. While preliminary, this estimate does suggest that stations are paying more attention to programming in 1985 than in 1984. Given this encouraging news, the model estimates this factor alone will add 975,000 cume persons and 85,000 AQH persons to the national audience.<sup>6</sup>

The resulting projected Spring 1985 audience estimates are shown on Table 5. The availability and accessibility model predicts a national audience of 9,450,000 cume listeners and 594,000 AQH listeners — an increase of 15.1% and 18.8%, respectively, over 1984 audience estimates.

This prediction is only an educated guess — taking the model beyond its bounds and basing its projection on incomplete data do not argue for its accuracy. But precision is not the point here; the reason for this exercise is to determine whether or not public radio is likely to continue the two-year slump in its rate of audience growth.

Both the 10% estimate (Table 4) and the A&A growth model (Table 5) predict that, between 1984 and 1985, public radio's AQH audience has grown at a faster rate than it did during the 1982-1984 period. And if its audience has in-

creased at a rate predicted by the A&A model, public radio is well on its way to doubling its audience in five years. But if the actual rate of growth proves to be closer to the 10% estimate, then public radio has some catching up to do. (Refer to Tables 1 and 2.)

### 4.3. STATION PERFORMANCE

The audience for "public radio" is really the sum of the audiences for a system of individual stations. When examining the question of national audience growth, it is necessary to determine whether or not individual stations can increase their levels of audience service significantly.

In very round terms, approximately 36,000,000 AQH persons are using the 9,000 commercial stations in this country. This is an average of 4,000 AQH persons per commercial station. Similarly, 500,000 AQH persons are using the 300 NPR member stations, for an average of 1,700 AQH persons per station. These simple numbers indicate that the **average NPR member station serves less than half of the audience served by the average commercial station**. Each station in the system could be serving twice as many listeners and its audience would still be smaller than the average commercial station's.

Perhaps this simple analysis is too simple. To be sure, there are many other factors which affect the number of persons served.

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<sup>6</sup> The model substantiates that, at this stage of public radio's development, programming has a much greater effect on audience than does the number of member stations. As seen from these figures, the decrease of a single macro seam for all stations in the system will serve as many new cume listeners as will the addition of 25 new stations; in terms of AQH persons, one macro seam lost is worth 40 member stations gained.

One of the most important is the size of the market. Table 6 breaks down the average NPR and commercial station AQH audiences by market rank. It shows that member stations outside of the top 25 markets are serving only 32%-42% of the audience served by the average reported commercial station in their market. In the top 25 markets, member stations are doing only 25% (in markets ranked 11-25) to 11% (in the New York and Los Angeles markets) as well as their markets' average reported commercial stations.

This, too, is a simplistic analysis; it is not intended to imply that public radio **should** be

compared with commercial radio. The comparison is made merely to examine whether public radio is serving anywhere near the number of people it might. This analysis strongly indicates that there is room for public radio to grow — especially in the largest 25 markets, where half of the US population resides.

Another comparison can be made among public stations themselves. This too indicates that most public radio stations have a great deal of room for growth. In Spring 1984, Arbitron broke down national radio listening into 165 ADIs and 13 ADI combinations. **In seventy of these ADIs, all listening to all member sta-**

**Table 6**  
**AQH Audience For NPR Member Stations**  
**Compared With AQH Audience For Reported Commercial Stations**

MARKET RANK	AQH AUDIENCE PER AVERAGE		
	NPR MBR STATION	REPORTED STATION	NPR MBR AS A% OF REPORTED STN
TOP 2	6,300	58,200	11%
3-10	4,700	23,200	20%
11-25	2,800	11,400	25%
26-50	2,100	6,500	32%
51-75	1,700	4,200	40%
76-100	1,200	3,000	40%
101-125	800	2,400	33%
126+	800	1,900	42%

NOTE: The number of reported stations is the number of commercial stations meeting minimum reporting standards and published by Arbitron.

SOURCE: Arbitron Spring 1984, M-S 6a-12m  
 NPR member stations: ADI data from ASALE tapes.  
 Reported Stations: TSA data as reported by James Duncan in American Radio.

tions combined accounted for **less than one percent of all radio listening done by the people in those markets**. Yet the same data tells us that public radio can do much better: in 23 of these markets, listening to NPR member stations accounted for over three percent of all radio listening.

**All indications are that most NPR member stations can significantly increase their service to the public.** But public radio will not increase its service to the public merely by wishing it so.

## 5. SETTING THE GOAL

Is the goal of doubling the national AQH audience by the end of 1989 a realistic one? Given this analysis, is it possible?

Yes, it is **possible**. Simple comparisons of average member station audience to average commercial station audience show that public radio has a great deal of room for growth — particularly in the larger markets, where the growth would have the largest impact on the system as a whole.

**But achieving this goal will require a concerted effort to overcome all that public radio currently has working against it.**

Inertia is working against public radio. Long-term historical analyses show that the rates of growth necessary to double the audience in the next five years are well within past system growth rates. But most recently, between 1982 and 1984, **the system's growth rate has slowed and stagnated, and only the most optimistic projection for 1985 suggests that this audience growth rate has picked up enough to move the system towards the audience doubling goal on schedule.**

The increases in availability and accessibility — the forces which caused the stem's rapid

rates of audience growth during the seventies and early eighties — are not nearly as rapid as they once were.

- Availability, which has been estimated by the number of member stations in the system, has additional important components. Transmitter power, antenna height, location, and configuration, signal processing, translators — these and many other technical improvements have been made to **existing** member stations, increasing their availability dramatically. But **the upper limits of technical availability enhancement have been reached by many stations.**
- Availability is also a function of the number of public stations in a market — especially the larger markets. **While there are still major markets with only one CPB-qualified (and/or NPR member) station, this number is diminishing.**
- Programming — all aspects of programming at all levels of production and presentation — will be the most critical and powerful component driving any increase in audience service. Programming is the service to the public. But **since (and in part because of) NPR's financial crisis two years ago, the system as a whole has not paid a great deal of attention to ways in which programming can be enhanced.**
- Availability and accessibility are very much tied to system resources, the most important of which is money. Money buys broadcast and production equipment. Money buys talented and dedicated people; it trains them; it buys the tools they need to serve the public intelligently and creatively; it encourages

them to remain with public radio. But **in terms of constant dollars, the amount of money available per CPB-qualified station has remained virtually constant since 1981.**<sup>7</sup>

## 6. CONCLUSIONS AND COMMENT

Hindsight is an exact science, while foresight is a gift reserved to fewer people than claim it. The analyses contained in this evaluation only yield clues as to what might happen to the size of public radio's audience in the next few years.

But one thing seems very clear: much of what will happen in the next few years is very much

Can public radio double its audience before 1990? Unless the public radio system seriously addresses the issue immediately, this goal will be **impossible**. Even then, it will remain **highly unlikely** unless the public radio system translates lip service into audience service; only at that point will the goal become **remotely possible**. Reaching this goal can only be made **probable** if it becomes the system's **overriding priority** — the one against which all options are compared and for which all decisions are made — for the next 42 months.

This is all the time public radio has left before the Spring 1989 audience measurement period.

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<sup>7</sup> Based on estimates made by Tom Thomas, who used the Consumer Price Index and data provided by the CPB.