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WHAT HAPPENED TO PUBLIC RADIO LISTENING DURING THE GULF WAR ? WILL THERE BE LASTING EFFECTS ?

by David Giovannoni

*The civilian is a soldier on 11 months' annual leave.
—General Yigael Yadin, Israeli Chief of Staff*

The Arbitron audience estimates now being released by the Radio Research Consortium show record audiences at many public radio stations during the most recent sweep. Arbitron's Winter quarter began January 3rd and ended March 27th, 1991, during which time national attention was absorbed by the war in the Persian Gulf.

The research has yet to be done that irrefutably links larger audiences to public radio's coverage of the war. But the correlation is almost certainly more than coincidence. It seems safe to say that larger audiences were indeed a function of interest in — and programming about — the war.

However, there's more to the war story than just larger numbers. Imbedded in the audience data is a wealth of information that answers a number of important questions. The three on many people's minds right now are:

- Did interest in the war bring new listeners to public radio?
- If so, where did they come from? If not, why did the number of persons using public radio swell?
- Will these higher listening levels be maintained into the Spring sweep?

The correct answers are:

- There is no evidence that the war caused significant numbers of new listeners to tune to public radio for the first time.
- The number of persons using public radio increased because existing listeners used public radio more, and because peripheral listeners tuned in frequently enough to be counted in the weekly cume.
- Higher listening levels will not be carried into the Spring sweep unless 1) a station has improved its programming significantly in the last few months, or 2) there's another war or other prolonged event of comparable national and international interest.

Shifting Utiligraphic Segments

In order to comprehend both the long- and short-term effects of the war on public radio listening, we must understand *utiligraphics*. Just as *demographics* report who people are, *geographics* report where people live, and *psychographics* report how or what people think, *utiligraphics* report how people use radio in general — public radio in particular.

Public radio listeners can be segmented into three utiligraphic groups.

- People in the *core* tune to their public station at least once per week and listen to it more than any other station. Core listeners are those to whom public radio appeals most. They account for about two-thirds of all listening to public radio; yet, in a week's time, they account for only one-third of public radio's listeners.
- People in the *fringe* tune to their public station at least once per week but listen to some other station(s) more. Fringe listeners account for two-thirds of public radio's weekly listeners, yet they account for only one-third of all listening to public radio.
- People in the *periphery* tune to their public station every once in a while, but typically do so less than once per week. They account for a relatively insignificant amount of listening at any given time; yet over the course of a year, as many peripheral listeners will tune to public radio as there are regular weekly cume listeners. For instance, a station with a weekly cume audience of 100,000 persons will have an annual cume audience exceeding 200,000 persons once all people in the periphery have checked in.

These three listener types are discussed in detail in "Utiligraphic Segmentation," Chapter 2 of AUDIENCE 88's *Programming* report, published in 1988 by CPB.

People in the periphery are indeed public radio listeners, but most of them are not counted in public radio's weekly audience because they listen less frequently than once per week. Interest in the war, and public radio's unique coverage

and analysis of the war, caused peripheral listeners to tune in more frequently; hence they were more likely to be captured in Arbitron's measurement of the weekly cume, and they boosted the size of the weekly cume audience.

It's crucial to remember that these were not "new" listeners; they were existing listeners who listened to public radio more often than usual because of extenuating circumstances.

Although the influx of peripheral listeners boosted the weekly cume, it did not raise listening levels by the same amount. The higher average quarter-hour audiences and shares seen during the war were the result of more listening by people in the fringe and core.

People in public radio's core became heavier radio listeners during the war. Most of their additional listening was to public radio. In addition, many people in the fringe also increased their time spent listening to public radio — so much so, in fact, that they became core listeners.

It's important to understand that all of this occurred without off-air promotion. The war served as a natural field experiment that confirms what many have been saying for some time: Promotion isn't the solution because awareness isn't the problem. This national crisis demonstrates that people know where to turn for the information and analysis that public radio provides. They know where to find it when they want it.

Appeal

Every type of radio programming is like a magnet that attracts a certain type of person. This attraction is called appeal. When events are especially compelling, as they were during the Gulf war, public radio's news magnet becomes more powerful and people are attracted with

greater frequency. Core TSL increases. Some fringe listeners become core listeners, and many peripheral listeners enter the weekly cume.

For all intents and purposes, this surge of magnetic strength was merely a temporary aberration. The war is over. And although its aftermath is tragic and urgent in its own way, the story is simply not perceived as compelling a reason to tune to public radio as it was during the war.

There's been some speculation that the increased frequency of listening induced by the war caused some people to discover (or rediscover) public radio's programming. Perhaps. This would be particularly true if a station had gotten significantly better over the last few months; people in the periphery who might not have tuned in under normal circumstance may have been introduced to these improvements during the war. In terms discussed in AUDIENCE 88's *Advertising & Promotion* report, the war would have "hastened the next tune-in" — that is, shortened

the time it took for a peripheral listener to discover the improved programming.

But even if they're now listening more, these people account for a small fraction of all public radio listening. Years of observation and analysis teach us that it's the basic underlying appeal of programming that attracts, serves, and maintains listeners. Wars, exploding spaceships, and off-air promotion may increase frequency of listening and apparent audience size in the short run — but consistent programming appeal is what keeps listeners coming back.

The ultimate lesson is simple. If public radio desires to continue serving as many listeners as it did during the war, its programming must be every bit as relevant, compelling, and appealing during peacetime.

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THE UTILIGRAPHIC EFFECTS ON PUBLIC RADIO'S LISTENERS

“The war” occurred in the third through eighth weeks of the sweep (January 17th through February 27th, dates roughly coinciding with the allied invasion through General Schwarzkopf’s “mother of all briefings”). To examine its utiligraphic effects on public radio’s listeners, we have combined audience data for one AM and 17 FM stations: KCFR, KCRW, KERA, KJZZ, KPBS, KPLU, KQED, KUOW, WABE, WAMU, WBEZ, WBUR, WETA, WGBH, WKSU, WNYC-AM, WNYC, and WSHU. All stations are public radio AudiGraphics subscribers from the top 25 markets that have a significant national and international news presence.

Each graph on page 5 shows some aspect of listening week by week during two 24-week periods. The period of interest (solid line) shows the last 12 weeks of 1990 and the first 12 weeks of 1991 (Arbitron’s Fall 1990 and Winter 1991 sweeps). The dashed line shows the same aspect of listening for the last 12 weeks of 1989 and the first 12 weeks of 1990 (Arbitron’s Fall 1989 and Winter 1990 sweeps). Use the dashed line to compare last year’s “norm” against this year’s listening (solid line). (Note: Weekly estimates are smoothed using an algebraic weighting system to mitigate their inherent instabilities. See the Sub-Sweep Audience Estimate section on page 5 for a more detailed explanation.)

The Listener-Hour graph clearly shows much higher levels of public radio consumption by core listeners during and immediately after the war. Consumption by fringe listeners is also slightly greater.

Increased consumption, or gross levels of listening, can result from more people in the cume, and/or higher time spent listening (TSL). Both of these utiligraphics were seen among public radio’s core listeners. As the TSL graph shows, the average core listener spent more time with public radio during the war. But as the Cume graph shows,

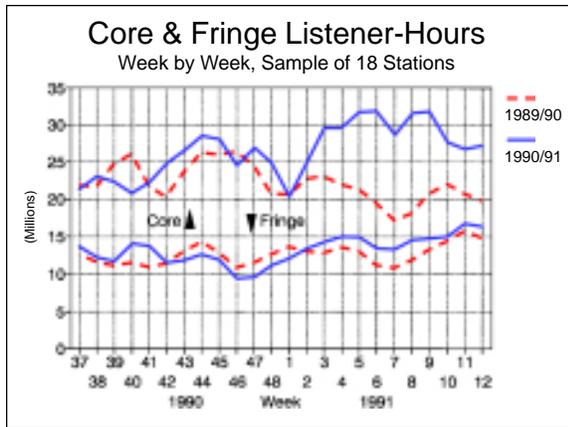
increased TSL alone does not account for all of the additional core consumption of public radio. Clearly, *many public radio listeners moved into the core during the war*. That is, more people than usual listened to their public radio station more than any other during this time.

Most of these people came from the fringe. That is, without the extenuating circumstance of war, many of these “new” core listeners would have used some other station more; they would have been in public radio’s weekly cume, but in the fringe.

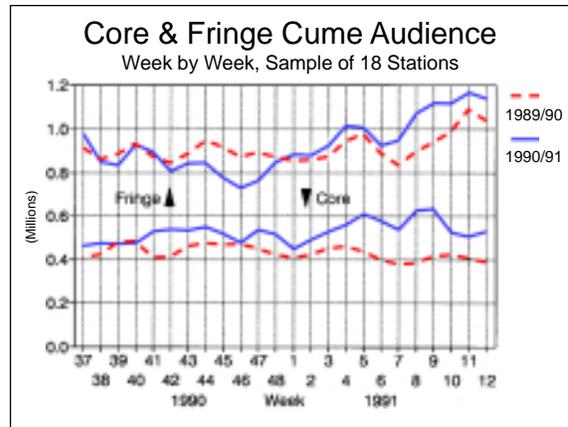
But if so many fringe listeners moved into the core, why are there more fringe listeners overall? Clearly, *there was an influx of listeners into public radio’s weekly cume*. That is, people who would not normally have listened to their public station *did* listen.

Were these “new” listeners? Almost certainly not. As AUDIENCE 88’s *Programming* report discusses in detail, there exist a great number of “peripheral” public radio listeners (also referred to as “samplers”) who are usually not counted in the weekly cume because they typically listen less than once per week. However, they know their public radio station exists, and they tuned to it during the war because it had the coverage and analysis that they sought. *But these listeners weren’t new — they were merely tuning in more frequently*.

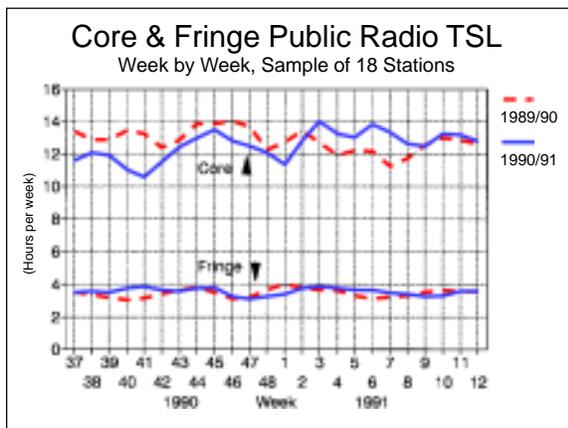
If peripheral listeners entered the weekly cume as fringe listeners, why then did TSL to public radio not increase among its fringe listeners? This is simple but tricky. TSL is an average. As some people normally in the fringe listened more, they moved from the fringe into the core; this served to cap fringe TSL growth. Some fringe listeners stayed in the fringe and listened more; but this upward force on TSL was offset by lighter listening by people entering from the periphery. So it all evened out, and TSL, an average, remained essentially constant for this utiligraphic group.



Listener-Hours is a measure of gross consumption — “How much listening is done to public radio?” One person listening to public radio for five hours contributes five listener-hours; so do five persons listening one hour apiece.



Cume Audience is a measure of reach — “How many people listen at some time or another?” Cume is the number of different people who tuned to one of these public radio stations for at least five minutes during the reported week. These stations serve roughly one-in-ten public radio listeners across the nation.



Time Spent Listening (TSL) to Public Radio is a measure of average public radio use — “How long does the average listener to these public radio stations listen during the week?”

Sub-Sweep Audience Estimates

Because each Arbitron sweep measures listening across 12 weeks, it is possible to calculate listening for shorter periods, such as a month, a week, or even a day. However, two major obstacles limit our ability to put the data under the microscope in this way.

The first obstacle is *sample size*. When we reduce the sample size, which we do in effect when we examine only one week’s or one month’s worth of diaries, we simultaneously decrease the certainty with which the sample represents the radio-listening population. Our resulting estimates may be less accurate, more subject to statistical error or “bounce.”

The second obstacle has to do with the *sample distribution*. In a perfect world, one-twelfth of a sweep’s diaries would be in the field in any week, and they would be distributed evenly across all geographies and demographics. But since it’s not a perfect world, Arbitron must compensate for any sampling inequalities by mathematically rebalancing or “weighting” the sample based on the twelve-week return.

Usually the sample doesn’t deviate too severely, and month by month estimates of audience size are reliable enough for most purposes. But without full knowledge of weekly sample characteristics, or without the introduction of complex formal statistical safeguards, we cannot reliably compare audience size at finer levels; weekly or daily estimates of cume listeners, average quarter-hour audiences, or listener-hours are too vulnerable to unknown sampling inadequacies to be made with any certainty.

Interestingly, statistics that report the *composition* or *behavior* of listeners can be computed reliably enough (for most purposes) at the weekly level. While not completely immune from sample imbalances, loyalty, TSL, occasions, and duration are fairly robust statistics.

One way to mitigate both the sample size and sample distribution problems is to base sub-sweep audience estimates on a number of different markets and stations. For instance, this analysis month by month for the most recent 18 month, as indexed to the average month in 1990. Far more reliable than the weekly estimates upon which this analysis is based, the monthly estimates confirm that among these stations, listening levels were significantly higher in the first three months of 1991 than during the same period in 1990.